

Clarksville

CITY
PLAN

2040



Adopted: XXXX XX, 2019

Resolution: 2019 - XX

ACKNOWLEDGEMENTS

Mayor

Mark Simpson

City Council

Freeman Wish
Edward Bradley
Eddie King

Judy Weaver
Danna Schneider
Heather Johnston

Planning Commission

Vickie Alston - Chair
Doug Bryan
Kim Douglas

Jacob Gould
Iva Nell Gibbons
Darrell Weathers

Jazz Johnston

Steering Committee

Pam Bishop-Hamilton – Planning Commission
Vickie Alston – Planning Commission
Matt Wylie
Morgan Barrett
Gina Wilkins

Freeman Wish – City Council
Edward Bradley – City Council
Steven Wyatt
Tom Cogan
Kellie Danielson

Staff

Verla Clark – Administrative Official
Shawn Grigsby – Building Official
John Lester – CLW General Manager

Barbara Blackard – City Clerk/Treasurer
Tom Cogan – Parks Director/Street Superintendent
Jeff Mize - CLW

Planning Team

James P. Walden, AICP - Garver
Juliet Bell Richey, AICP - Garver
Isaac D. Sims – Garver

Phil Walker, AICP - TWC
Randall Gross – RG/DE
Ben Lykins, AICP – Garver

Brent Thomas, PLA - Garver

TABLE OF CONTENTS

EXECUTIVE SUMMARY 5

ONE: INTRODUCTION 6

TWO: CONTEXT AND TRENDS 10

 2.1: HISTORY AND REGIONAL SETTING 10

 2.2: MARKET ANALYSIS..... 12

 2.3: TRENDS..... 26

THREE: VISION AND GOALS..... 37

 3.1: MAJOR ISSUES 37

 3.2: VISION STATEMENT 42

 3.3: GOALS AND POLICIES..... 42

 3.4: COMMUNITY OUTREACH..... 49

 3.5: ALTERNATIVE GROWTH SCENARIOS..... 51

FOUR: THE PLAN..... 54

 4.1: PLACE TYPE PLAN AND STANDARDS 54

 4.2: DOWNTOWN STRATEGY 62

 4.3: DOWNTOWN ECONOMIC DEVELOPMENT STRATEGY 74

 4.4: CONSERVATION AND RECREATION PLAN 86

 4.5: TRANSPORTATION AND MOBILITY PLAN 94

 4.7: ANNEXATION STRATEGY PLAN..... 131

 4.8: UNIVERSITY DISTRICT STRATEGY AREA..... 133

FIVE: IMPLEMENTATION PLAN 136

 5.1: IMPLEMENTATION MATRIX..... 136

APPENDICES 137

 A.1: MAPS AND GRAPHS 137

 A.2 COMMUNITY OUTREACH SUMMARY..... 144

 A.3 MARKET ANALYSIS 159

FIGURES AND TABLES

Figure 1.1.1 Planning Area Boundary 8

Figure 2.2.1 Economic Base – Clarksville 12

Table 2.2.2 At-Place Employment Trends – Clarksville, 2003-2015 13

Figure 2.2.3 Job Flow – Clarksville 14

Table 2.2.4 Trends in Housing Structure – Clarksville, 2010-2016 15

Figure 2.2.5 Residential Permit Trends – Clarksville, 1995-2017 16

Table 2.2.6 Trends in Housing Occupancy – Clarksville, 2011-2016 17

Figure 2.3.1 Population Growth – Clarksville & Batesville 26

Table 2.3.2 Selected Ethnic and Racial Characteristics – Clarksville and Selected Entities 26

Figure 2.3.3 Age Distribution – Clarksville 27

Figure 2.3.4 Age Distribution – Arkansas 27

Figure 2.3.5 Educational Attainment – Clarksville and Selected Entities 28

Figure 2.3.6 Occupational Composition – Clarksville & Arkansas 29

Figure 2.3.7 Median Household Income – Clarksville and Selected Entities 30

Figure 2.3.8 Per Capita Income – Clarksville and Selected Entities 30

Figure 2.3.9 Household Income – Clarksville & Arkansas 31

Table 2.3.10 Poverty – Clarksville and Selected Entities 31

Figure 2.3.11 Occupancy Status – Clarksville and Selected Entities 32

Figure 2.2.12 Percentage of Household with Housing Affordability – Clarksville and Selected Entities 32

Figure 2.3.13 Age of Housing – Clarksville & Arkansas 33

Figure 2.3.14 New Single Family Construction – Clarksville 33

Table 2.3.15 Distance to Work – Clarksville 34

Figure 2.3.16 Travel Time to Work – Clarksville and Selected Entities 34

Figure 2.3.17 Population Change – Clarksville 35

Figure 2.3.18 Population Change Scenarios – Clarksville 36

EXECUTIVE SUMMARY

Provided following Council Presentation

ONE: INTRODUCTION

This document contains the officially adopted Comprehensive Plan for Clarksville, Arkansas, known as Clarksville City Plan 2040. In 2016, the City of Clarksville began the process to create Clarksville City Plan 2040 as an update of its previous 2007 Comprehensive Plan. This effort was undertaken in response to numerous contentious development battles that revealed the city had no cohesive, consensus community vision. Additionally, the city needed to determine and define future community infrastructure investment projects. By engaging residents, elected and appointed officials, business leaders, university stakeholders, and others, the plan represents a united vision of Clarksville's future for the next 25 years. The Plan, which was completed in mid 2018, articulates and identifies how development, mobility, the environment, recreation, public services, and character all interrelate and will guide Clarksville's future.

Clarksville City Plan 2040 began in response to numerous development battles revealing the city had no cohesive, consensus community vision.

What is the Comprehensive Plan?

The plan serves as an official policy statement of the City of Clarksville for directing growth and development within its city limits and planning area as well as articulating strategies to address Clarksville's current and future challenges. A steering committee directed the preparation of the plan during a process that included careful study of the area. Areas of analysis include Clarksville's history, demographics and projected population, community and stakeholder opinions, topography, utility capacity, transportation systems, existing infrastructure, and land use among myriad other items.

Clarksville City Plan 2040 is an official policy statement of the City of Clarksville establishing a consensus vision to guide the community over the next 25 years.

The plan will help guide the decisions of both the Planning Commission and City Council during the planning period, estimated to be 25 years. It is additionally intended to outline strategies and actions for key private entities as well, such as the Chamber of Commerce. The Comprehensive Plan serves all residents and property owners within the planning area as well as others having a stake in the future of the city.

The Comprehensive Plan provides a broad guideline for growth and development. It is not meant to direct land use arrangement precisely, nor is it a zoning ordinance. It serves as an instrument to blend public and private interests in a manner that will best suit the entire community.

Citizens and business interests may look at the plan as a "constitution" for the City of Clarksville. Unlike a national constitution, it may change more often to meet new challenges and growth issues.

The plan will remain flexible, allowing for necessary modification of land uses. It plots land usage areas according to long-term community needs, not short-term individual gains. Planning should also be based on sound development principles. The plan addresses pertinent community issues as a whole rather than treating isolated problems as they may arise.



Clarksville has inherited a legacy of numerous beautiful buildings.

Planning Process

The planning process consisted of three primary phases. The following details the work that was undertaken.



Authority

The purpose of the Comprehensive Plan is consistent with the provisions of Arkansas Codes, Annotated (A.C.A.), §14-56-403. This section requires that plans of a municipality be "... prepared in order to promote, in accordance with present and future needs, the safety, morals, order, convenience, and general welfare of the citizens." The statutes further state that plans may provide for, among other things, the following:

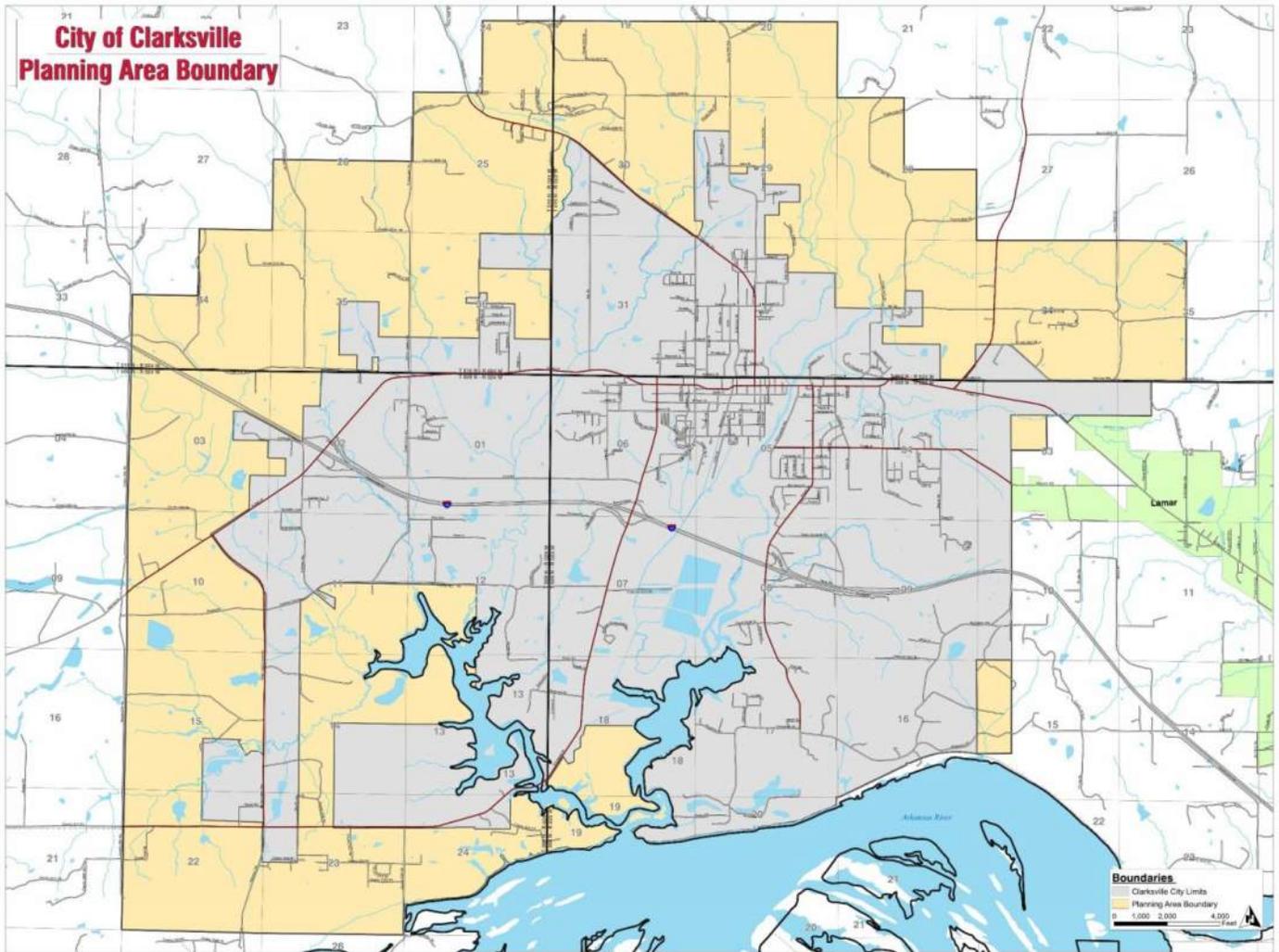
- *Efficiency and economy in the process of development*
- *The appropriate and best use of land*
- *Convenience of traffic and circulation of people and goods*
- *Safety from fire and other dangers*
- *Adequate light and air in the use and occupancy of buildings*
- *Healthful and convenient distribution of population*
- *Good civic design and arrangement*
- *Adequate public utilities and facilities*
- *Wise and efficient expenditure of funds*

Planning Area

The Clarksville Planning Area Boundary appears in graphic form on the plan map, planning area boundary map, and other maps used with this document. The Planning Area Map was prepared in accordance with statutes found in the Arkansas Codes, Annotated § 14-56-413. A copy is on file with the City Clerk and the Johnson County Recorder.

The Planning Area Boundary depicted on the Comprehensive Plan map includes those lands within the territorial jurisdiction of Clarksville for which it may prepare plans, ordinances, and regulations. This area extends beyond the city limits to include those areas most likely to become a part of the city within a period of twenty-five years. The City of Clarksville will, in accordance with A.C.A. § 14-56-422, file the plans, ordinances, and regulations as they pertain to the territory beyond the corporate limits with the county recorder of Johnson County.

Figure 1.1.1 Planning Area Boundary



Relationship to the Land Use Regulations

The Arkansas planning statutes, in A.C.A. § 14-56-416 (a)(1) provide:

Following adoption and filing of the land use plan, the commission may prepare for submission to the legislative body a recommended zoning ordinance for the entire area of the municipality.

The statutes further provide in A.C.A. § 14-56-417 (a)(1):

Following adoption and filing of a master street plan, the Planning Commission may prepare and shall administer, after approval of the legislative body, regulations controlling the development of land.

These provisions, along with the modern history of planning since the landmark case of Village of Euclid, Ohio v. Ambler Realty Co., 272 U.S. 365 (1926), signify a strong relationship between the plan and its supporting regulations. In simple terms, a municipality first plans and then regulates. The primary supporting regulations consist of the zoning code and development (subdivision) regulations. As stated in A.C.A. § 14-56-412 (e):

In order to promote, regulate, and control development and to protect the various elements of the plans, the commission, after adoption of appropriate plans as provided, may prepare and transmit to the legislative body such ordinances and regulations as are deemed necessary to carry out the intent of the plans, or of parts thereof.

Planners take these provisions literally and encourage municipalities to base decisions in land use and development upon adopted plans to the greatest extent possible. At the same time, it has been noted in court decisions in Arkansas that plans are not legal documents but rather broad statements of municipal policy. The legal force arises from the adopted regulations developed to support the plan. In order to reconcile these considerations, the Planning Commission will first determine if a proposal deviates from the spirit and intent of the plan. If it does, the Commission will then consider an amendment to the plan before considering the proposal.

TWO: CONTEXT AND TRENDS

2.1: History and Regional Setting

History

Clarksville, named for early settler Lorenzo N. Clark, is among Arkansas' oldest communities due to its advantageous geographic location. Historically Osage lands, the area was occupied by various Native American tribes prior to the 1830s during the period of Indian Removal. In 1838, just two years after Arkansas achieved statehood, a courthouse was built in the area on the same site where the present courthouse stands today, making Clarksville the seat of the newly formed Johnson County. Notably the new community was also home to a Federal Land Office until 1859.

In 1848, the city was incorporated. Over the next 25 years, the small town of Clarksville grew slowly, stalled by the Civil War and devastating fires. Nevertheless, Clarksville reached 466 residents by the 1870s. In 1873, Clarksville was put on the map when the Little Rock and Fort Smith Railroad was extended to the city. The resulting influx of workers and migrants into Clarksville along with the waning use of steamboat and stagecoach travel gave the town a rowdy reputation, and helped the city surpass nearby communities like Spadra in size and acclaim. During this period, coal mining was prevalent in the area, but declined by the 1930s. Over the years, Clarksville grew into a vibrant city fueled by the poultry and agricultural industries.



Downtown Clarksville, circa 1920. (JC Hill Bldg)



University of the Ozarks, Circa 1920s.

An important component of Clarksville's history and future is the University of the Ozarks. This institution was originally founded in 1834 in Cane Hill (Washington County), making it one of the oldest institutions of higher education in the state. In 1891, the school was moved to Clarksville and renamed Arkansas Cumberland College. In 1920, the school became College of the Ozarks and later, the University of the Ozarks. This college was the first in Arkansas to graduate a woman (1875), and the first historically white college in the state to admit an African-American student (1959).

In 1934, the Johnson County Municipal Airport was built, today known as the Clarksville Municipal Airport. In 1948, a flood control project was completed that restrained Spadra Creek, which flooded several times in the early 1900s. This infrastructure improvement allowed for a resurgence in downtown Clarksville. Expansion of the College of the Ozarks in the 1940s helped to fuel a resurgence in population growth in Clarksville while Johnson County was seeing a decline in population. Today, Clarksville stands tall upon the foundation of its history, looking toward a bright future.

Adapted from *The Encyclopedia of Arkansas History & Culture*

Regional Setting

Clarksville, the county seat of Johnson County, is located along the Arkansas River at the foothills of the Ozark Mountains in the Arkansas River Valley region. The community is within the northwest section of the state, 101 miles northwest of Little Rock, 26 miles northwest of Russellville, and 60 miles east of Fort Smith. Other nearby towns include Ozark, Lamar, Morrison Bluff, Scranton, Knoxville, Hartman, and Coal Hill.



Clarksville has two major east-west corridors running through it, U.S. Highway 64 and Interstate Highway 40. U.S. Highway 64 is an important cross-country federal highway that parallels Interstate 40 in Clarksville. This 2,330-mile highway was constructed in 1926 to carry cross-country traffic from the Atlantic shores of North Carolina to Arizona. U.S. Highway 64 was (and remains) Main Street in downtown Clarksville and was therefore an important generator of travel and traffic through the city for decades. But completion of the 2,550-mile Interstate 40 from Wilmington, North Carolina to Barstow, California largely supplanted this route for long-distance travel and bypassed the center of Clarksville. As such, much of the commercial exposure afforded the city by U.S. Highway 64 is less advantageous today. North-south corridors include Arkansas Highways 103, 194, and Scenic Highway 21.

Not only is Clarksville connected to the rest of the state through its roadways, but the nearby airport, railroad, and river, also link the city to the rest of the state and country. The Clarksville Municipal Airport is in the eastern section of the Planning Area. The airport provides 4,500 feet of runway and is open to the public. Commercial air service is available at Fort Smith Regional Airport with daily service to Atlanta and Dallas. The city is also served by Class I rail through Union Pacific Railroad. In addition, the Arkansas River runs just to the south of the Planning Area and is navigable by barge. Overall, the transportation system in Clarksville is exceptional and gives the city an intermodal advantage over other small towns in the state.

Clarksville has a unique intermodal trifecta of a major river supporting barge traffic, a major freight interstate corridor, and a Class 1 railroad.

The well-connected transportation system in Clarksville has attracted a significant amount of development. As a result, growth in the city has occurred primarily along these corridors. The Arkansas River and Lake Dardanelle are located to the south of Clarksville. The town's location along the upper end of Lake Dardanelle places the city in a unique situation as large

portions of floodplain divide the city into three separate areas. This has also served to break up the continuity of development and spread growth out across the city.

Lake Dardanelle is a 34,000 acre reservoir best known for its abundant fishery. Bass, catfish, and crappie fishing, as well as several fishing tournaments, attract many visitors to the area each year. Clarksville has several other great recreational resources in and around the city. Scenic Highway 21, known as the Ozark Highland National Scenic Byway, runs through the city, heading north through the picturesque Ozark National Forest towards Eureka Springs and Branson. Creeks, lakes, waterfalls, campgrounds, trails, peach orchards, and other spectacular outdoor areas surround the Planning Area and create an ideal destination for outdoor recreation.

2.2: Market Analysis

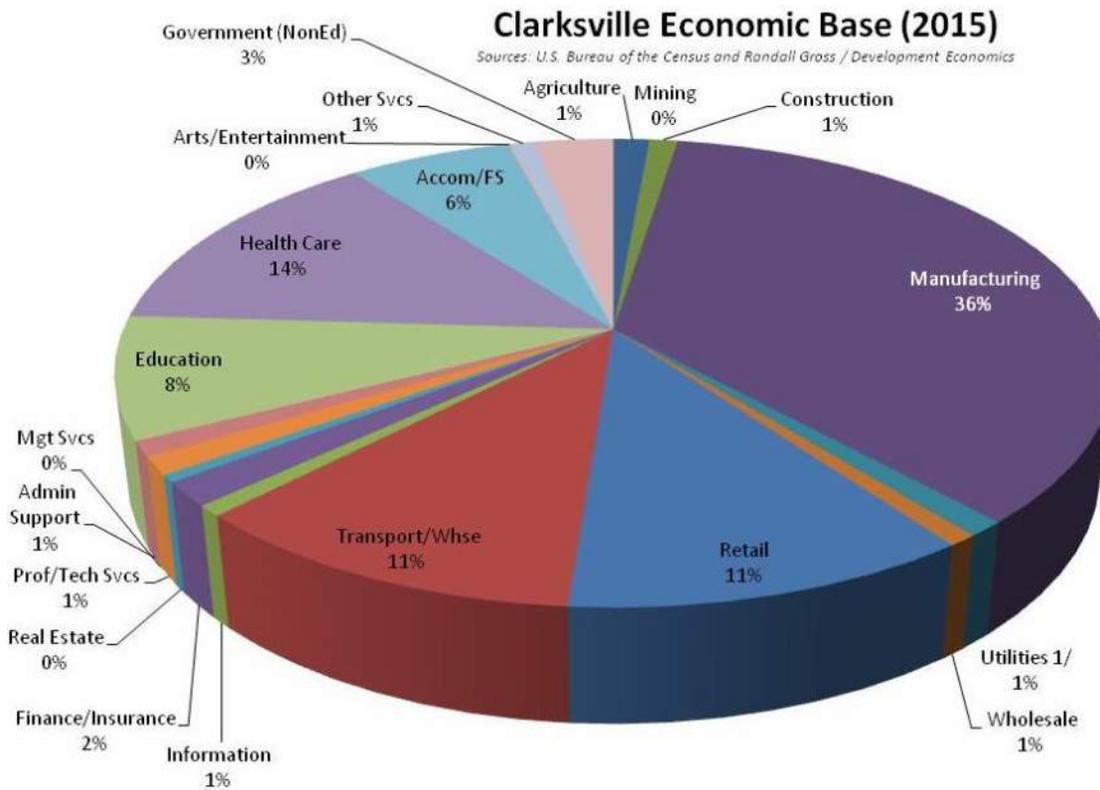
This section contains an abbreviated version of the full market analysis conducted. The entirety of the narrative is contained in Appendix A.4.

Economic Base and Trends

Clarksville’s economy is heavily dependent on manufacturing, which represents nearly 40% of all jobs within the city. The next three largest sectors include health care (14%), retail (13%), and transportation & warehousing (13%). Thus, nearly four out of five jobs in the city are concentrated in just four sectors.

Several sectors have somewhat modest representation in the city, including education (8% of all jobs), accommodation & foodservice (6%), and government (3%). Meanwhile, many economic sectors are relatively under-represented in the city. The city has little or no employment in Management Services (e.g., corporate headquarters or holding companies), arts and entertainment, real estate, and mining. Administrative support services, professional and technical services, information services, wholesale trade, utilities, construction, agriculture, and other services each represents just 1.0% of the local economy while finance & insurance represents just 2%.

Figure 2.2.1 Economic Base – Clarksville



Employment and Labor Force Trends

The Clarksville economy has remained relatively stagnant even since the end of the global financial crisis and national recession of 2008-09. While unemployment has fallen in Johnson County from 7.9% in 10/2010 to 3.1% in 10/2017, the labor force has also shrunk. Johnson County's labor force fell from 10,977 in 2010 to 10,518 by 2015 (a decrease of 4.2%). The Johnson County labor force had still not recovered to pre-recession levels by October 2017. Similarly, Clarksville's employment had fallen during the recession, and is just now returning to pre-recession levels.

The city has total employment of about 6,700, according to the U.S. Bureau of the Census. This represents a decrease of about 100 (1.5%, or 0.2% per year) since 2003, although the employment base decreased at a faster rate after 2010 (3.9% per year). Clarksville saw only marginal growth or a decrease in employment in nearly all sectors, with the exception of transportation & warehousing (up by 127 jobs or 20.9%), government (64, 45.3%), and health care (51, 6.0%). The administrative support sector expanded by 30.2%, but it only added 16 jobs to a small base in Clarksville.

Table 2.2.2 At-Place Employment Trends – Clarksville, 2003-2015

Industry	2003	2010	2015	Number Change	Overall Percent Change	Annual Change Rate
<i>Source: U.S. Census Bureau, RG/DE</i>						
Agriculture	160	140	92	(68)	-42.5%	-3.5%
Mining	4	9	-	(4)	-100.0%	-8.3%
Construction	76	56	72	(4)	-5.3%	-0.4%
Manufacturing	2,484	2,579	2,352	(132)	-5.3%	-0.4%
Utilities	77	82	70	(7)	-9.1%	-0.8%
Wholesale	51	70	53	2	3.9%	0.3%
Retail	790	769	737	(53)	-6.7%	-0.6%
Transportation/Warehousing	607	637	734	127	20.9%	1.7%
Information	41	33	48	7	17.1%	1.4%
Finance/Insurance	137	140	111	(26)	-19.0%	-1.6%
Real Estate	60	29	32	(28)	-46.7%	-3.9%
Professional/Tech Services	76	61	82	6	7.9%	0.7%
Management Services	4	-	-	(4)	-100.0%	-8.3%
Administrative Support	53	47	69	16	30.2%	2.5%
Education	541	613	555	14	2.6%	0.2%
Health Care	849	921	900	51	6.0%	0.5%
Accommodation/FS	472	412	417	(55)	-11.7%	-1.0%
Arts/Entertainment	5	7	4	(1)	-20.0%	-1.7%
Other Services	70	54	63	(7)	-10.0%	-0.8%
Government (Non-Ed)	139	200	202	63	45.3%	3.8%
Total	6,696	6,859	6,593	(103)	-1.5%	-0.2%

Employment trends since are an area of concern. Despite continued steady population growth over the last 15 years, employment in the city has declined.

The manufacturing sector lost more than 130 jobs in Clarksville over the 12-year period, but has actually lost 227 jobs since 2010 (after gaining employment up to that date). Despite this relatively large numerical loss, the manufacturing sector still dominates Clarksville’s employment base and the loss only represents a 5.3% decrease. The city also lost significant

numbers of jobs in agriculture, retail, finance & insurance, real estate, and accommodation and foodservice. Losses in tourism-related industries are perhaps the most distressing, since the sector is less dependent on the local demographic base. The city forms the heart of a significant agricultural region, with a particular strength in peach production.

Major Employers

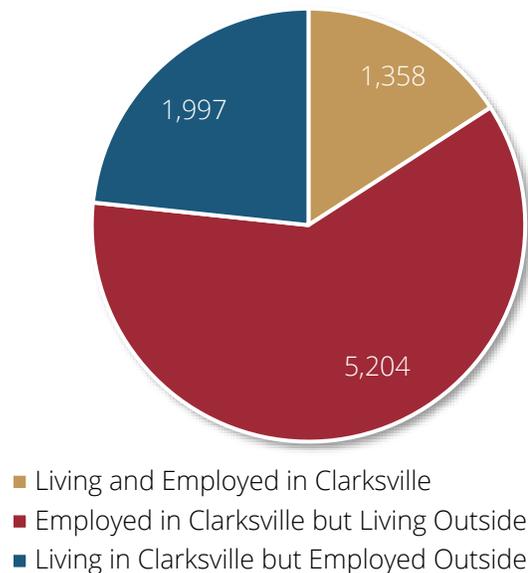
In 2013, the largest employers in Clarksville and Johnson County included Tyson Foods, Walmart Stores, Hanesbrands, Johnson Regional Medical Center, Clarksville School District, Baldor Electric Company, University of the Ozarks, and Munro and Company. Of these entities, 50% were engaged in manufacturing and 25% in education. Walmart operates an 850,000 square-foot distribution facility in Clarksville, which may account for some of the growth in transportation and warehousing employment since 2003.



Clarksville's Walmart Distribution Center

Commuting Patterns and Trends

Figure 2.2.3 Job Flow – Clarksville



Source: ACS 2014 (5-Year Estimates) U.S. Census Bureau

A significant share (78.4%) of Clarksville’s workers commute to their jobs from outside of the city. Only 21.6% of Clarksville’s jobs are held by Clarksville residents. Clarksville’s workers come from a wide variety of places including Russellville, Fort Smith, Springdale, and Little Rock but also from dozens of small towns in the region. In general, just less than one-half (46.7%) originate in Johnson County, with significant numbers commuting from Pope (7.3%), Logan (4.7%), Benton (3.5%), Washington (3.1%), Franklin (2.9%), Sebastian (2.7%), and Pulaski (2.1%) counties. This area roughly defines the city’s extended labor market area.

Meanwhile, more of Clarksville’s residents work outside of the city (57.4%) than in it (42.6%). Significant numbers work in Russellville (e.g., Entergy’s Arkansas Nuclear One Plant); or in Little Rock, Lamar, and Knoxville. Just over 50% stay in Johnson County to work, while nearly 10% commute to Pope County, 8% to Pulaski County, and 3% to Logan County for work. Others commute to Yell, Sebastian, Benton, Faulkner, Franklin, and other counties. Overall, Clarksville seems to have the strongest economic relationship with Russellville and Pope County, the closest micropolitan area.

Housing Market Analysis

The housing market analysis forecasted the potential for housing development and rehabilitation within the city of Clarksville as an input to the comprehensive planning process. Existing housing market conditions were analyzed based on field reconnaissance, and analysis of Census data, apartment inventory, and housing sales trends information. A housing market area was defined and household demographics projected through 2022. Based on the demographic forecasts, employment trends, and other factors, housing demand was forecasted. The competitive context was analyzed and the city’s capture of future demand determined within key demographic cohorts and market segments. The findings from this analysis are summarized below.

Housing Supply and Characteristics

Clarksville has a total of about 3,900 housing units. Nearly 70% of these units are in single-family detached homes, while another 17% are in 2-4-unit buildings. There are relatively few units in larger, multi-family buildings and Clarksville has almost no attached single-family housing (e.g., townhouses). The city does have residents living in about 250 mobile/manufactured homes.

Table 2.2.4 Trends in Housing Structure – Clarksville, 2010-2016

Housing Type	2010	2016	Number Change	Overall Percent Change
<i>Source: U.S. Census Bureau, RG/DE</i>				
Single Family Detached	2,577	2,681	104	4.0%
Single Family Attached	40	23	(17)	-42.5%
2-4 units	642	670	28	4.4%
5-9 units	94	103	9	9.6%
10-19 units	171	127	(44)	-25.7%
20+ units	36	62	26	72.2%
Mobile/Manufactured Homes	121	243	122	100.8%
Boat, RV, Van	-	-	-	0.0%
Total	3,681	3,909	228	6.2%

The number of housing units is estimated to have increased by about 230 since 2010, for an average increase of about 38 per year. Only about 100 single-family homes are estimated to have been added since 2010, yielding an average increase of just 16 per year. Meanwhile, the number of attached single-family and mid-sized multi-family buildings actually declined since 2010.

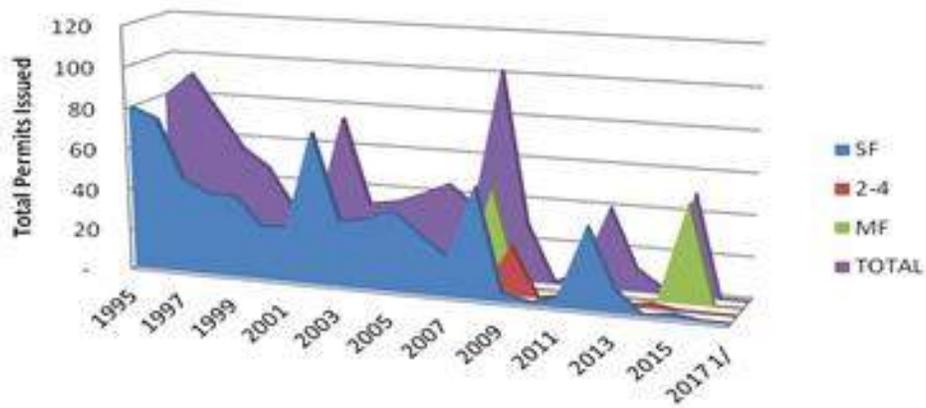
Construction Trends

The City of Clarksville has issued nearly 900 housing permits (an average of 41 per year) since 1995. However, housing construction has gradually declined in Clarksville since that year. Between 1995 and 1999, the City issued an average of almost 70 permits per year, including 56 single-family and 13 multi-family units per year. Between 2000 and 2009, the number fell to 44 per year, including 34 single-family units. That period includes the recession of 2000-2001, when permits fell to just 26 per year overall. The most recent global financial crisis and recession seems to have had a devastating impact on Clarksville’s housing market, which has seen only 14 units (7 single-family) permitted per year on average since 2010. This number is even lower than the 16 per year determined based on Census housing estimates but is consistent with information supplied by brokers and realtors active in the market.



Grandview Avenue is home to many large historic homes.

Figure 2.2.5 Residential Permit Trends – Clarksville, 1995-2017



U.S. Census Bureau, RG/DE

Housing Market Indicators

Clarksville has a total of 3,900 housing units, up by about 220 or 5.9% since 2011. As one indicator of demand, the number of occupied housing units has increased by 340 or 10.4% since 2011, yielding a declining vacancy rate. Overall housing market indicators are summarized below.

Table 2.2.6 Trends in Housing Occupancy – Clarksville, 2011-2016

Factor	2011	2016	Number Change	Overall Percent Change
<i>Source: U.S. Census Bureau, RG/DE</i>				
Total Units	3,692	3,909	217	5.9%
Occupied	3,273	3,615	342	10.4%
Renter Occupied	1,438	1,553	115	8.0%
Vacancy	11.9%	4.1%		
Median Rent	\$ 608	\$ 618	\$ 10	1.6%
Owner Occupied	1,835	2,062	227	12.4%
Vacancy	0.6%	2.6%		
Median Value	\$86,800	\$ 92,300	\$ 5,500	6.3%

Rental Housing

There are about 1,550 renter-occupied units in Clarksville, representing 39.6% of the total. There are seven low-income housing developments in the city with 396 units. A 34-unit affordable housing development has recently been built on U.

S. Highway 64 East. Otherwise, there is very little new rental-housing product in the Clarksville market. Much of the rental housing stock is in single-family homes held by investors and is not always well maintained.

Poor maintenance of rental housing is a common problem in the community.

Vacancy

The city's vacancy rate peaked at nearly 12% just after the recession but has fallen back to about 4% today. This vacancy is within the normal range for a healthy market where there is a balance between supply and demand. One company manages about 90 units averaging 6 to 8% vacancy. New low-income housing filled up fairly rapidly, thus helping to meet some pent-up demand for affordable housing in the city. The number of rental listings on Trulia.com has increased significantly since April 2017, but the numbers (20 listings in August 2017) are still relatively small.

Construction Costs vs Sale Prices

Construction costs in central Arkansas (Little Rock area) are estimated to fall in the range of \$90.64 to \$134.59 per square foot, with an average of \$112.62. At this cost, a 1,800 square-foot house would logically be priced at about \$220,000 to \$250,000, depending on land prices. Lots in Johnson County are averaging \$15,000 to \$18,000, while those in city subdivisions are priced around twice that amount, at \$30,000+.

Housing market conditions and construction costs are a barrier to any new higher end housing, except for custom built homes.

Thus, new housing (of 1,800 square feet) in Clarksville would need to approach the upper end of the range or \$250,000 to be profitable for most home builders. Clarksville housing prices have averaged \$92,500 over the last

seven years (or about \$100,000 to \$110,000 at present), and newer construction tends to sell in the \$125,000 range, on average. Housing sold at such prices would, by necessity, be of a smaller size (1,100 square feet) and constructed of cheaper materials (e.g., siding to yield lower costs at the \$90/sf range) in order to be profitable, assuming land costs can be held down.

Key Market Segments

Based on housing sales, economic indicators, and interviews with agents and brokers, the largest segment (40%) in the Clarksville market has been identified as first-time home buyers. These buyers typically fall within the 25 to 35 age cohort and are moving up out of rental apartments or living with parents. The second-largest group purchasing housing in Clarksville is investors (20 to 25%), the majority of whom are local or live in nearby Russellville and surrounding areas. The investors purchase property to generate secondary income through rentals to 1st-time renters, such as women with children or young people employed in their first job.

The remainder of the market is split between retirees (15-20%), job transfers (15%), and those up- or down-sizing (10-15%) in the local market. Retirees aged 55 to 75 relocate to the area from Florida, Illinois, California, Texas, Ohio, and other states for a combination of reasons, such as to be in the mountains with have a moderate climate, or due to the low cost of living and a slower lifestyle. There are always job transfers as area employers expand or as people retire or move and are replaced in their positions. Up-sizing householders include those aged 40 to 50 who are selling a smaller home and building a larger new one as well as those whose families are expanding in size. Down-sizing householders include those aged 70 and over with increasing health issues or who otherwise no longer want to maintain a larger house and yard.

Market Segments	
First-time buyers	40%
Investors	20-25%
Job transfers	10-15%
Retirees	15-20%
Up/down-sizing	10-15%

Housing Demand

The market analysis forecasted housing demand within the broader Clarksville market area and among key inflow cohorts including retirees and those who may be motivated to move to the area for work. The analysis determined that there will be nearly 5,200 householders moving up or down within the market area over the next five years, due to reasons related to life changes, change in income, or other factors. Added to this number will be several hundred new households in the market, generated by job growth (relocations) or other factors that bring net new households to the market area.

The Clarksville area is projected to add about 370 jobs over the next five years, including added staff at the University of the Ozarks which is likely to generate downtown-related housing demand. Finally, retirement to the area will account for another 15 to 20% of growth in households over the next five years. Job growth, movement within the market, and retirement will generate demand for housing within the market. In addition, there will be a need for replacement housing where there are demolitions due to fire or damage, accounting for an estimated 0.5 to 1.5% of the overall housing stock.

Competitive Framework

Portions of Johnson County outside of the city of Clarksville, coupled with new development in Russellville, are among the locations most likely to compete for housing in the Clarksville market. The River Valley's new homes in Russellville are coming on line in the \$160-170,000 range for 1,800 square-foot and 3 bedrooms, targeting the middle of the market (e.g., nuclear plant and manufacturing workers) within both Pope and Johnson counties. Local builders claim to have been "scared away" from years of cumbersome and time-consuming

Pro-active engagement with regional developers is needed to recruit them to Clarksville and help the city capture more of the regional market demand.

approvals processes in Clarksville. Administrative changes have helped immeasurably in restoring confidence in the City's ability to process and approve building permits. Still, builders claim that land prices are too high to ensure profitability at affordable prices within Clarksville as compared with lower-priced county land. Either way, there is a need for pro-active engagement with regional developers to attract and recruit them into the Clarksville market to help the city capture its "fair share" and more of the market demand.

Rental Housing Potential

The market analysis forecasted potential for about 130 to 235 rental units in Clarksville over the next five years. This number includes up to 60 affordable "workforce" housing units to meet demand generated by those households with incomes below the Area Median Income (AMI) for Johnson County. Overall rental housing potentials in Clarksville are summarized below.

Table 2.2.8 Rental Housing Potential – Clarksville 2018-2023

Rent Range <small>Source: U.S. Census, Claritas, RG/DE</small>	Clarksville Area Capture		Market Rate
	Moderate	High	
\$300	13	17	-
\$500	9	13	-
\$600	13	21	-
\$700	20	36	-
\$800	12	22	17
\$1,100	18	36	27
\$1,200	13	31	22
\$1,500	4	14	9
Subtotal	102	190	75
<i>Workforce</i>	34	58	-
<i>Retirement</i>	11	14	12
Jobs Induced	15	30	25
Total	128	234	112

The number also includes up to about 15 retirement rental units and 30 "job-induced" units that would be generated by new employment growth specifically within Clarksville.

A significant amount of the rental demand would be for units renting in the \$600 to 700 range, but there is also demand for up to about 60 higher-end rentals in the \$1,000 to \$1,200 range. A significant amount of this higher-end rental demand would be generated by relocating workers, including faculty and staff of the University of the Ozarks as well as professional workers at other businesses in the city.

Homeowner Housing Potential

The market analysis also forecasted demand for development of 85 to 150 for-sale housing units in Clarksville over the next five years. This number includes about 50 to 60 workforce units for those households making less than the median housing income for Johnson County. The potential also includes up to 40 job-induced units and 30 retirement housing units. Nearly all of these markets would be accommodated in market-rate housing.

Table 2.2.9 Homeowner Housing Potential – Clarksville 2018-2023

Price Range	Moderate	Area Capture High	Market Rate
\$ 106,250	14	17	-
\$ 156,250	8	11	-
\$ 185,100	5	10	-
\$ 218,750	4	10	7
\$ 247,500	5	11	8
\$ 288,750	3	6	4
\$ 367,500	7	15	12
Subtotal	46	80	31
<i>Retirement</i>	14	31	22
Jobs Induced	24	40	36
Total	84	151	90

Housing Prices

There is significant workforce housing demand at the lower-end of the market around \$100,000, but there is also demand at various price levels up to a maximum of about \$365,000. In general, housing priced in the \$150,000 to \$225,000 range will find the middle of the market. Retirees and those relocating from other parts of the country for jobs are most likely to spend at the upper-end of these ranges, since they will have typically arrived from larger or more expensive markets. That being said, many retirees are attracted to the Tri Peaks Region due to its relative affordability. A growing share of retirement demand is being generated by existing residents of “flatland” portions of Arkansas (e.g., the Delta).

Retail Market Analysis

Findings from a Retail Market Analysis for Clarksville are provided in this section. This analysis examined existing retail market conditions, inventory and supply, sales trends, key sub-markets, and indicators of the existing market. Interviews were conducted with a sample of businesses. An inventory of commercial space and use was developed as a baseline. The Clarksville Retail Trade Area is defined and household demographics projected for this trade area. The market analysis forecasted household and student retail expenditure potentials and demand by specific type of retail, restaurant, entertainment, or personal service business. The competitive framework was examined. Finally, the warranted economic potential for new development or reuse of existing space for commercial uses was then determined based on the city's positioning and capture within the competitive market.

Vacancy

There is a total inventory of about 75,000 square feet (74,656) of vacant commercial space in the city. This amount yields a vacancy rate of 10.3% overall, which is about twice of where it should be under ideal market conditions. Some of the vacancy relates to the condition of retail space and functional obsolescence, but much of this issue is market related. Vacancy is highest in the downtown area, at 17.3% (or about 24,000 square feet, excluding several non-rentable buildings). Downtown suffers from both a lack of destination marketing activity as well as functional issues with the physical building stock, where retail space does not always meet the standards (such as floor space and layout) required for modern retail operations.

Retail vacancy rates are particularly high due to poor building conditions and lack of market demand.

Nevertheless, vacancy is also high outside of downtown in the Main Street corridor, at 14.8% (16,000 square feet). Here a part of the problem is the replacement of U.S. Highway 64 by I-40 as the main highway through the city. I-40 essentially bypasses the older commercial areas along Main Street, including downtown. By comparison, average daily traffic counts (ADT) along West Main reach approximately 9,600, while ADT on I-40 approach 30,000. Some of the competitive value of retail land along U.S. Highway 64 has been lost to big box stores and areas that benefit from interstate highway exposure. Not surprisingly, vacancy along South Rogers is somewhat lower, at about 8%, and the corridor has relatively little vacancy in areas most proximate to the interstate. South Crawford and West Clark (which also benefits from exposure to I-40) have little vacancy.

Vacancy rates are lowest on South Rogers, Crawford, and Clark Road.

Rents

Rents are difficult to pinpoint, since many businesses own or franchise their stores. But, rents tend to list for as low as \$3.50 per square foot and range up to about \$8.50 per month on free-standing properties (and up to \$12.00 on some smaller stores). Rents in shopping centers tend to be higher. Even where rents are relatively low, retailers tend to face challenges especially downtown with issues such as building conditions (e.g., flat roofs that contribute to leakage problems), parking, rehabilitation constraints (e.g., no/few incentives like tax abatements) and others.

Construction

There has been limited new retail construction or absorption of new space over the past 20 or more years. The average age of retail buildings, based on a sample of those included in the inventory, is about 48 years. Within the downtown area, not surprisingly, the average commercial building age is nearly 87 years (1930). Among the newer retail spaces are the Dollar General on West Main (2012), and the Family Dollar and Sonic Drive-In on South Crawford (both built in 2012). There was a flurry of commercial activity in the early 2000s, with the construction in 2003 of the Walmart Supercenter, followed in 2004 by Clarksville Plaza and other spin-offs.

Retail Trade Area

Clarksville should draw about 70-80% of its retail expenditures from within a natural trade area that includes the city of Clarksville and surrounding Johnson County, as well as from southern Newton County and northern Logan County (Paris, Scranton). In reality, Clarksville's retailers currently draw a higher share of their business from within the trade area, with very limited "destination" inflow from outside of the trade area. That being said, the city's retailers do see some inflow from portions of Pope (Russellville) and Franklin (Ozark) counties. For the purposes of this market analysis, the Clarksville Retail Trade Area includes the following sub-areas:

- Clarksville
- Rest of Johnson County
- Southern Newton County (Census Tract 1802)
- Northern Logan County (Census Tracts 9501, 2, and 3)

As noted above, Clarksville also draws inflow from Pope (Russellville) and Franklin (Ozark) counties as well as from tourists and travelers along I-40, U.S. 64, and the Ozark National Forest. Aside from trade area households and tourists, students from the University of the Ozarks are also generate retail demand in the city.

Competitive Framework

The competitive framework was defined in order to assess Clarksville's capture of retail demand within the trade area and likely inflow from outside of the trade area. A focus on the competition for sub-markets like downtown Clarksville was also provided. The analysis determined that much of the city's competition is generated from the east and west of the city in Russellville, Ozark, Fort Smith, Little Rock, and points in-between along I-40. Much of this competition comes in the form of destination shopper's goods, restaurants, and entertainment. Because Johnson is a dry county, residents of Clarksville and surrounding communities (as well as many tourists) are likely to drive to larger cities for dining and entertainment. When tourists are drawn to larger cities, they will also spend more money there on destination shopping for goods and services. Thus, there is market "leakage" from Clarksville to other communities, in part due to the lack of dining, destination shopping, and entertainment options.

There is market leakage due in part to Clarksville's lack of restaurants, destination shopping, and entertainment.

Clarksville Retail Potentials

Clarksville's retail market potentials were forecasted based on two different scenarios. The first scenario assumes a baseline "do nothing" approach without any pro-active retail marketing or business recruitment efforts. The second scenario assumes that there would be a "destination" marketing strategy implemented with a much more aggressive effort to pro-actively recruit businesses, provide incentives and assistance to business, and enhancing tourism and other destination marketing efforts.

Baseline Scenario

Under the “do nothing” approach, Clarksville will continue to have an over-supply of retail space of about 50,000 to 70,000 square feet.

Table 2.2.10 Baseline Retail Potential – Clarksville 2017-2022

Type of Good <small>Source:: RG/DE</small>	Gross Demand (SF)		Existing Uses	Warranted Demand
	2017	2022		
Convenience	112,283	116,655	88,152	28,503
Shoppers Goods	433,403	449,682	495,598	(45,916)
Eating/Drinking	69,788	71,445	53,148	18,297
<i>Limited Service</i>	30,918	31,647	26,486	5,161
<i>Full Service</i>	31,673	32,424	26,662	5,762
Entertainment	8,621	8,944	-	8,944
Personal Services	34,661	35,917	22,313	13,604
Total	658,757	682,642	659,211	23,431
<i>Existing Vacant</i>			<i>74,656</i>	<i>-</i>
New Net Space				(51,224)

In particular, there will be an oversupply of shopper’s goods stores within key categories including furniture, garden supply, non-department store general merchandise (i.e., “dollar” stores), used merchandise, automotive dealers, florists, automotive supply, and several other categories. Even so, there would be net demand in other categories like restaurants and entertainment, home centers, groceries, and certain specialty goods stores.

Without intervention, Clarksville is expected to have an oversupply of retail space in the coming years.

Destination Scenario

In the destination marketing scenario, where there is a more pro-active effort to recruit target retail businesses, provide incentives for operation, and enhance marketing for tourism and other destination markets, then there would be potential for nearly 180,000 square feet, or about 100,000 square feet of net demand (after 75,000 square feet of vacant space is filled).

Table 2.2.11 Destination Retail Potential – Clarksville 2017-2022

Type of Good <small>Source:: RG/DE</small>	Gross Demand (SF)		Existing Uses	Warranted Demand
	2017	2022		
Convenience	137,445	144,228	88,152	56,077
Shoppers Goods	467,850	484,650	422,456	62,193
Eating/Drinking	76,591	79,581	53,148	26,433
<i>Limited Service</i>	33,016	34,212	26,486	7,726
<i>Full Service</i>	34,348	35,517	26,662	8,855
Entertainment	17,241	18,051	-	18,051
Personal Services	35,807	37,350	22,313	15,037
Total	734,933	763,860	586,069	177,791
<i>Existing Vacant</i>			74,656	-
New Net Space				103,136

In this scenario, there is significant net demand in all major categories including convenience, shopper's goods, eating and drinking, entertainment, and personal services. In particular, there would be demand for home centers, gift and novelty stores, groceries, health and personal care stores, convenience, apparel and accessory stores, various specialty stores, eating and drinking establishments, personal service, and entertainment. A detailed summary of retail potential by specific category is provided in the Appendix of this report.

Recommended Retail Mix

A recommended target retail business mix is provided below, based on the findings of the retail market analysis. The target mix is disaggregated into downtown versus more “highway-oriented” locations in the city like U.S. Highway 64 and South Rogers Street. The recommended business mix is shown below.

Table 2.2.12-13 Recommended Retail Mix – 2017-2022

Retail Type	Square Feet
<i>Source:: RG/DE</i>	
Downtown	
Specialty Food Store	4,000
Hand-Made Jewelry/Accessories	3,500
Antiques/Home Furnishings	9,000
Musical Instruments/Lessons/Repairs	1,200
Gift and Novelty	6,000
Hobby/Toy/Games Destination	2,500
Leather Products	3,500
Sporting Goods-Camping/Hunting/Fishing	2,000
Office Supply/Shipping	3,000
Destination Restaurants	8,800
Coffee/Tea Shop	3,500
Other Restaurants	7,100
Entertainment/Recreation Venue	18,000
Health Spa/Services	10,000
Total	82,100

Retail Type	Square Feet
<i>Source:: RG/DE</i>	
Highway Oriented	
Specialty Grocery/Health and Personal Care	35,000
Convenience	8,500
Home Furnishings	10,000
Home Center	90,000
Limited Service Restaurants	7,700
Total	151,200

2.3: Trends

Population

Figure 2.3.1 Population Growth – Clarksville and Batesville

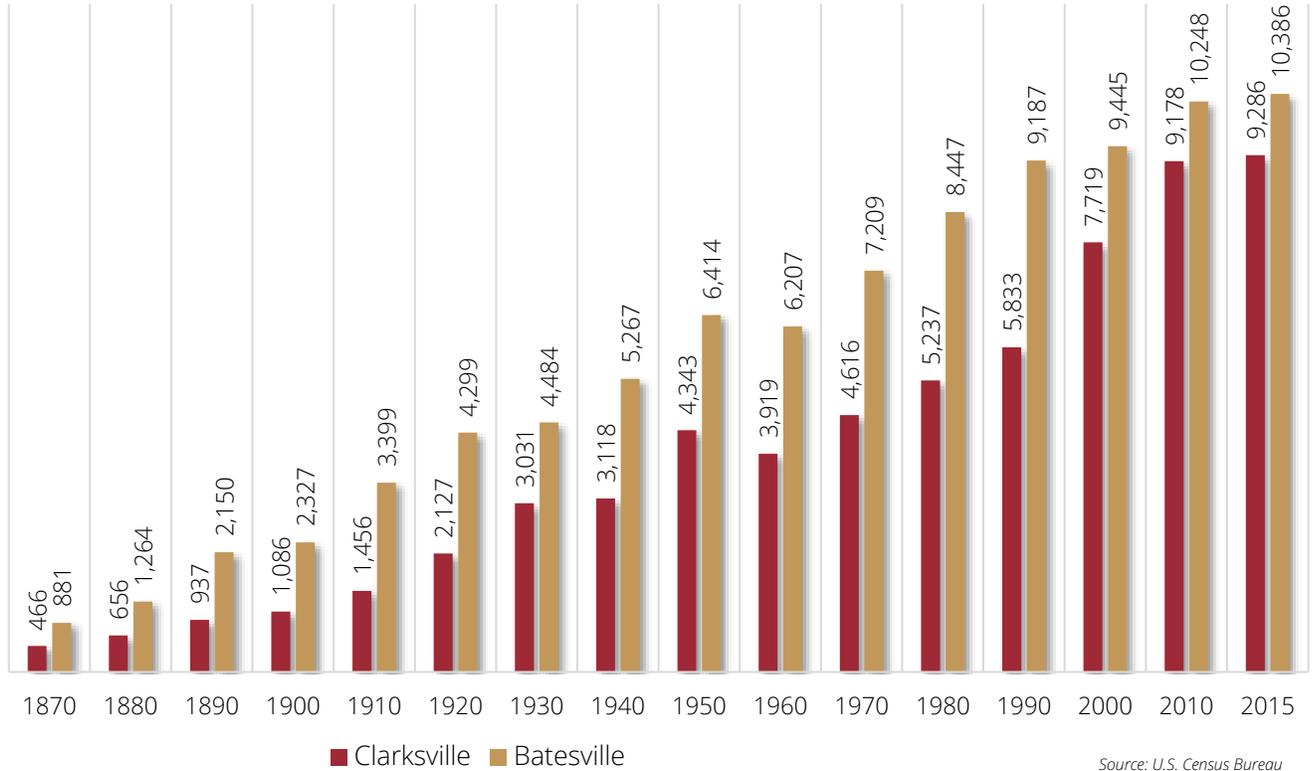


Table 2.3.2 Selected Ethnic and Racial Characteristics – Clarksville and Selected Entities

Race	Clarksville	Batesville	Johnson County	Arkansas
White Alone	84.8%	90.6%	92.3%	78.3%
Black or African American Alone	5.1%	5.6%	1.9%	15.6%
American Indian and Alaska Native Alone	0.4%	0.6%	0.5%	0.6%
Asian Alone	1.9%	1.1%	0.9%	1.3%
Native Hawaiian and Other Pacific Islander Alone	0.5%	0.0%	0.2%	0.2%
Some Other Race Alone	3.9%	0.8%	1.7%	2.1%
Two or More races	3.5%	1.4%	2.6%	2.0%
Hispanic	21.3%	13.5%	12.9%	6.7%

Source: U.S. Census Bureau

Figure 2.3.3 Age Distribution – Clarksville

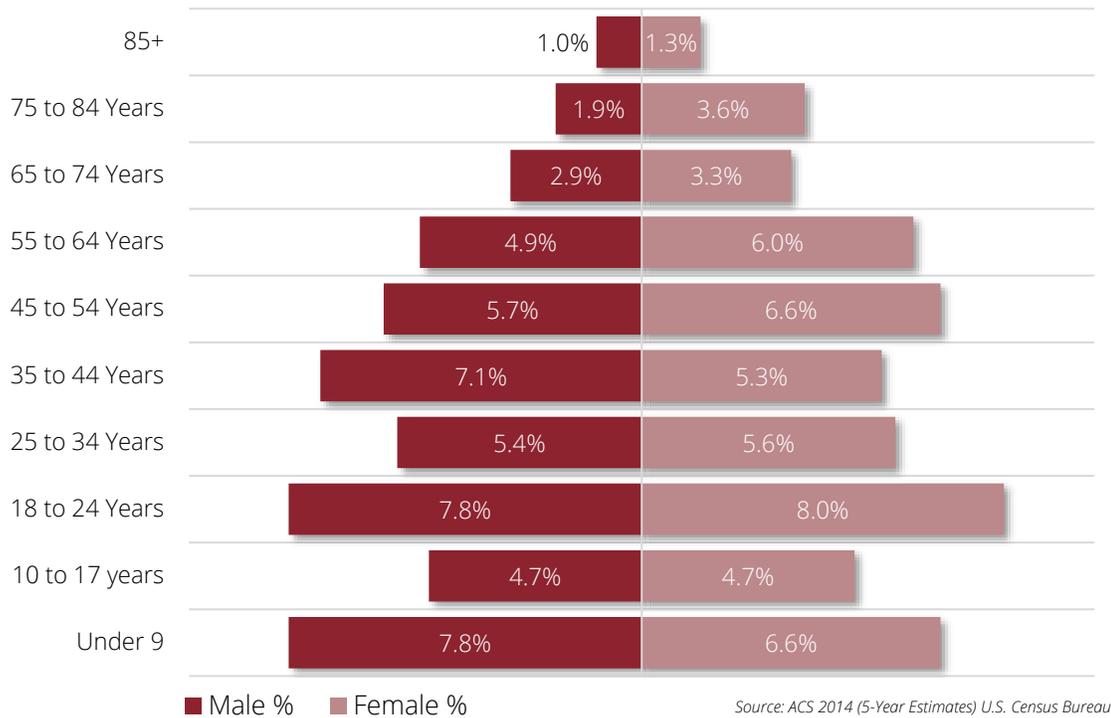
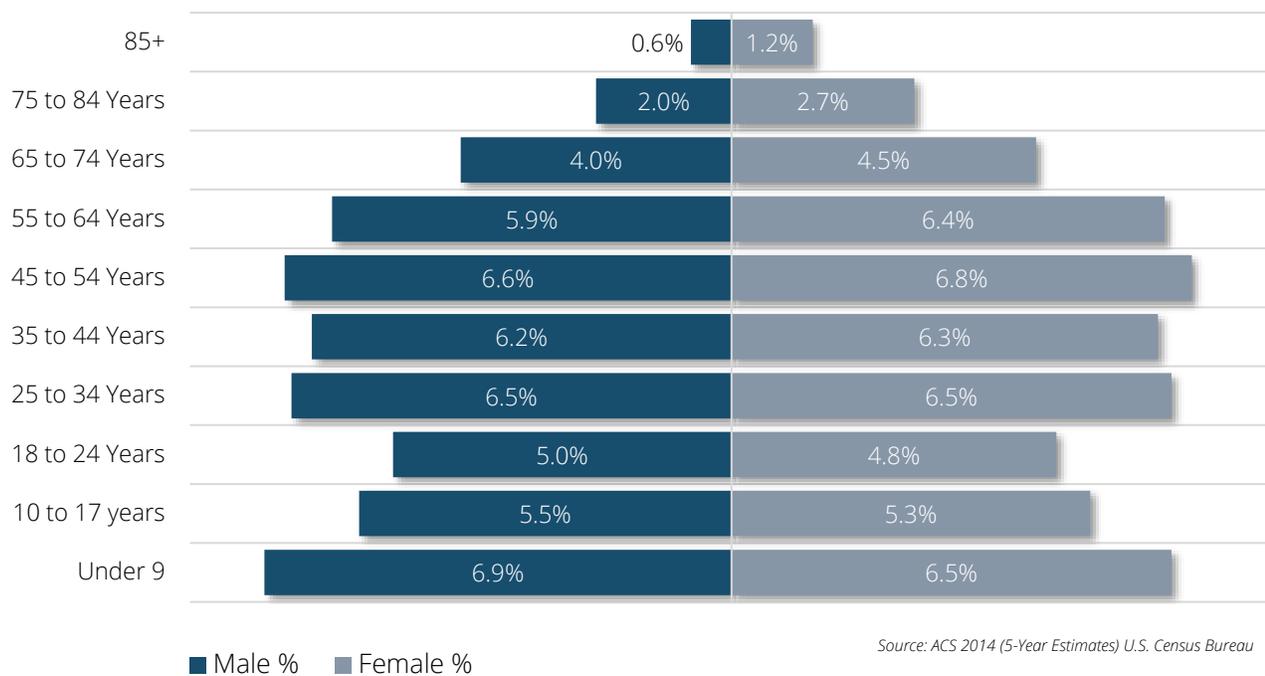


Figure 2.3.4 Age Distribution – Arkansas

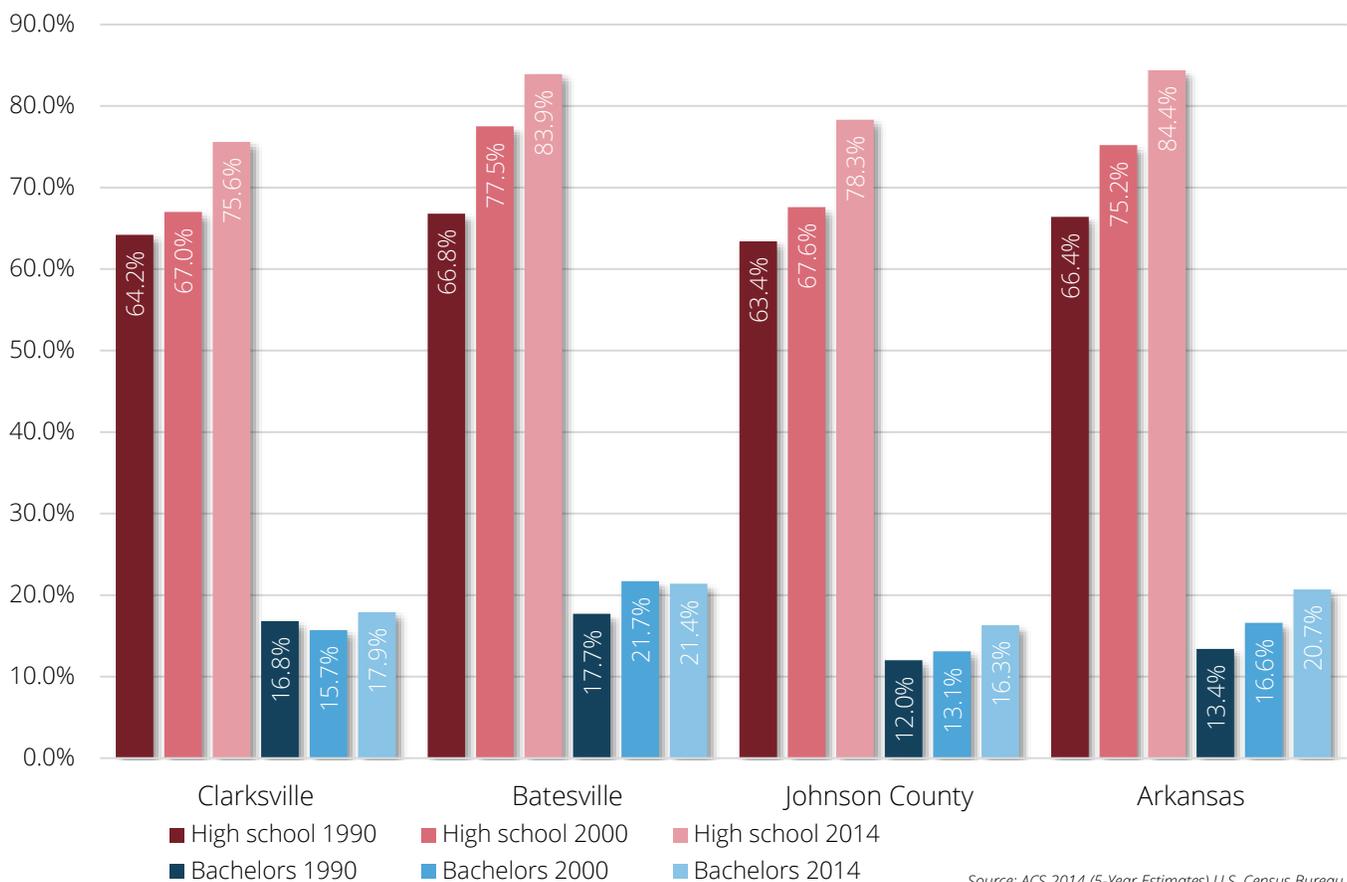


- Clarksville has seen steady population growth since the 1960s, likely fueled by the city's manufacturing sector and The University of the Ozarks.

- In recent years, growth has slowed in Clarksville and Batesville. This could indicate effects of a larger regional or national trend.
- Clarksville has a large Hispanic population share compared to the state and county. Clarksville makes up roughly half the population of Johnson County, but has a much larger percentage of minority population. This is likely because these population groups have been migrating into Clarksville to work in the manufacturing and poultry sectors.
- Hispanic population growth has accounted for half of Clarksville's growth in the last 15 years.
- Clarksville's age distribution is less uniform than that of the state, especially in the 18 to 24 year old range. This could be a product of the University of the Ozarks enrolling a large group of 18 to 24 year olds.
- Despite a small share of the 25 to 34 year old range, Clarksville's age distribution indicates a healthy population distribution. Meaning, even without migration into Clarksville, growth should continue.

Education

Figure 2.3.5 Educational Attainment – Clarksville and Selected Entities

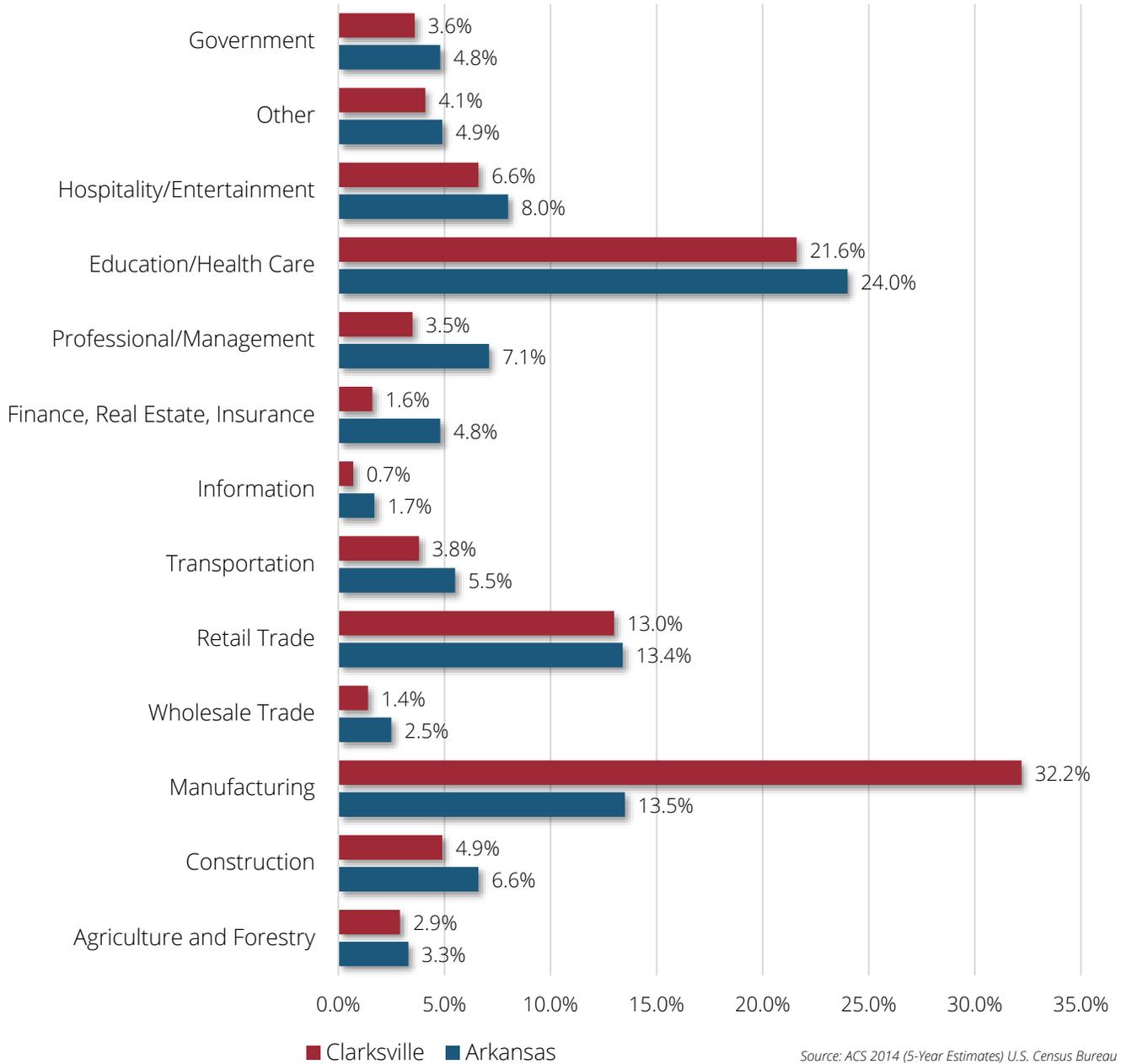


- Educational attainment has been improving in Clarksville since the 1990's, specifically the share of residents with a high school diploma equivalency. However, the improvements in educational attainment lag behind Batesville, Johnson County, and Arkansas. This could be a product of the manufacturing sector's prominence in the community.

- Clarksville has a smaller share of residents with at least a bachelor’s degree than would be anticipated in a college town. This could be an indicator that work should be done to retain *U of O* graduates and encourage in town residency of college faculty and staff.

Employment

Figure 2.3.6 Occupational Composition – Clarksville and Arkansas



- Clarksville has an economy less diverse than that of the state with a very heavy focus on manufacturing. This could lead to vulnerability in Clarksville’s economy due to changes in the national economy, as offshoring and

automation continue to erode employment in this economic sector. The plan will need to address the issue of economic resiliency to deal with inevitable shocks to Clarkville's future economy.

- Surprisingly, Clarkville has a lower percentage of residents employed in Education and Health Care than the state. This is unexpected due to the presence of *U of O* and Johnson Regional Medical Center.
- Clarkville also has fewer residents employed in Professional - Management Sector and Finance - Real Estate - Insurance sector, sectors where job growth would produce higher wage jobs.

Income

Figure 2.3.7 Median Household Income – Clarkville and Selected Entities

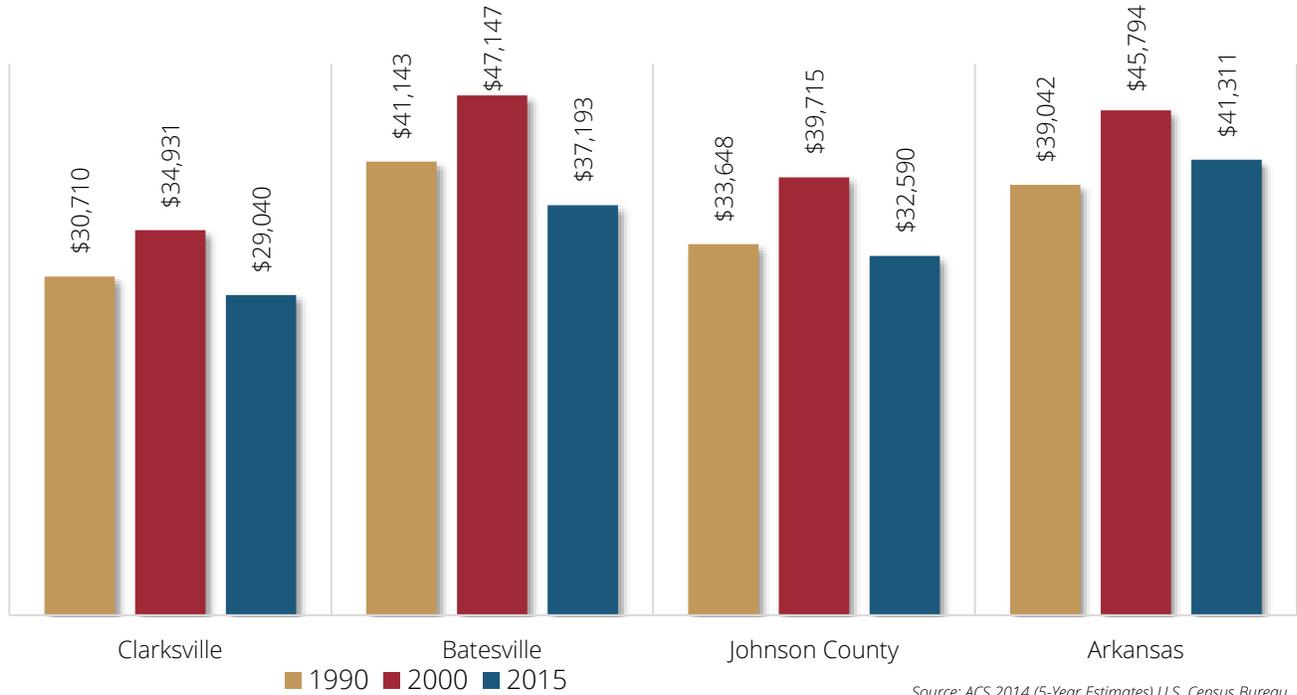


Figure 2.3.8 Per Capita Income – Clarkville and Selected Entities

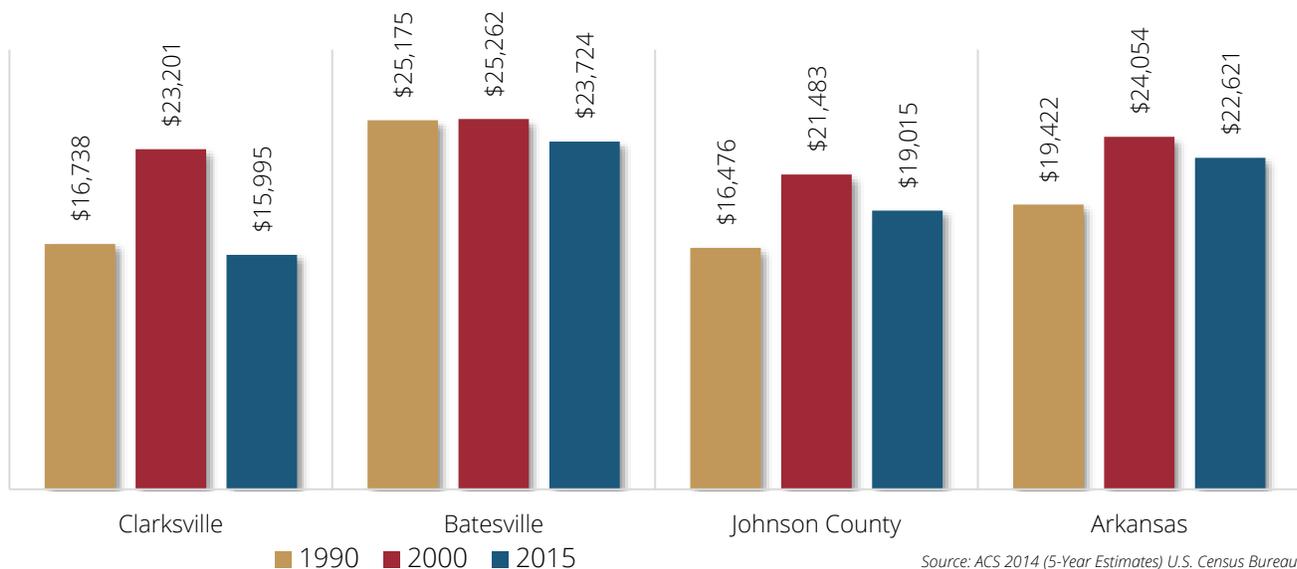


Figure 2.3.9 Household Income – Clarkville and Arkansas

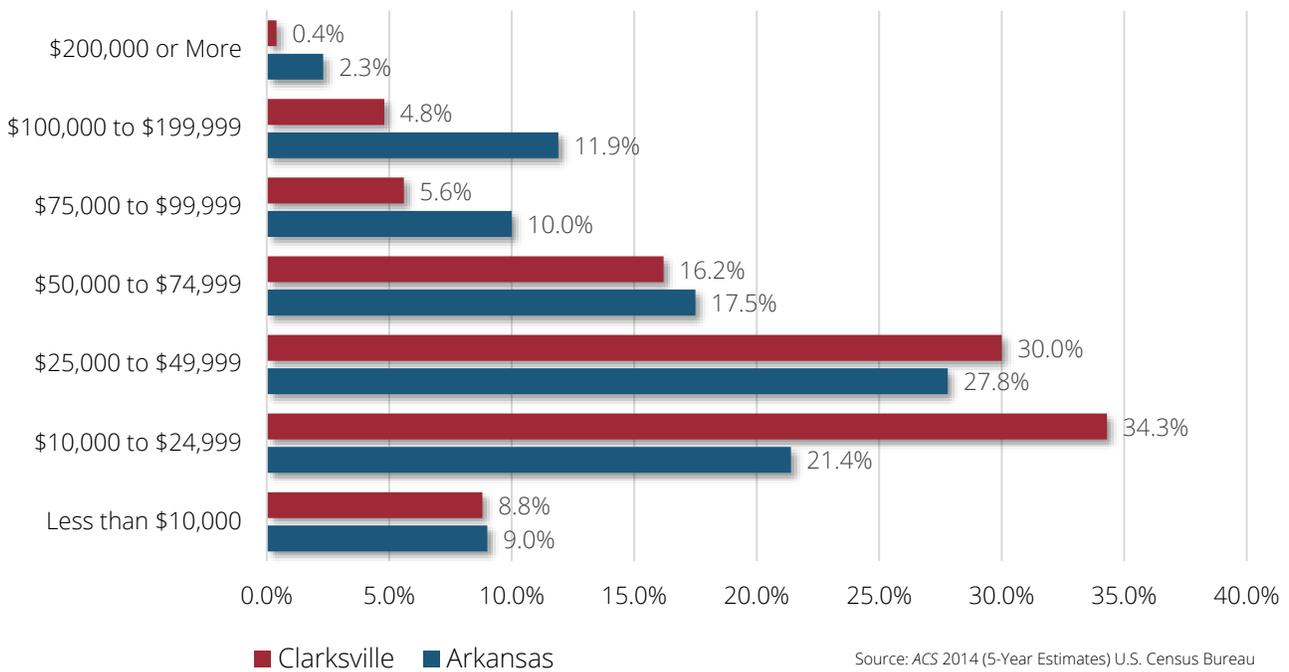


Table 2.3.10 Poverty – Clarkville and Selected Entities

Poverty Category	Clarkville	Batesville	Johnson County	Arkansas
Individuals below poverty level, 1999	20.3%	14.5%	16.4%	15.8%
65 years and older	13.4%	16.6%	15.3%	13.9%
Under 18	25.3%	15.5%	20.4%	21.9%
Individuals below poverty level, 2013	↑ 25.8%	↑ 21.7%	↑ 21.2%	↑ 19.2%
65 years and older	↓ 9.2%	↓ 7.3%	↓ 9.8%	↓ 10.5%
Under 18	↑ 43.5%	↑ 35.4%	↑ 33.2%	↑ 27.7%
Families below poverty level, 1999	16.2%	11.1%	12.9%	12.0%
No Husband Present	6.0%	6.1%	3.9%	5.8%
Families below poverty level, 2013	↑ 22.1%	↑ 17.0%	↑ 17.7%	↑ 14.4%
No husband present	↑ 13.1%	↑ 10.7%	↑ 8.6%	↑ 7.6%

Source: Source: U.S. Census

- Though per capita and household incomes are below Batesville, Clarkville income patterns have followed a national trend of decline when accounting for inflation. This poses a threat to the community's economic vitality.
- Incomes in Clarkville are much lower than the state on average. There are 13% fewer households with incomes over \$75,000 and 13% more with incomes below \$25,000.
- Poverty rates in Clarkville have been increasing on average, but the worst increase has been for children under the age of 18 increasing by 23% in the past 10 years. However, the elderly have seen a decrease in their poverty rate.
- Trends of increasing poverty and declining incomes are an issue of serious concern for Clarkville.

Housing

Figure 2.3.11 Occupancy Status – Clarksville and Selected Entities

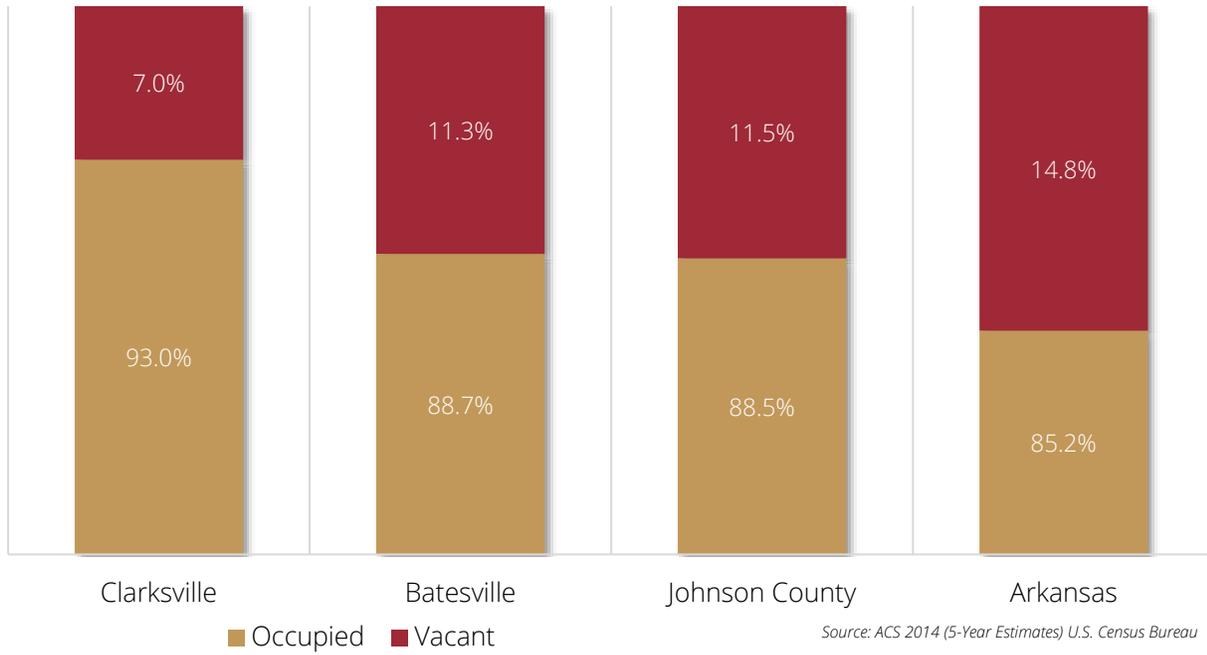


Figure 2.2.12 Percentage of Household with Housing Affordability – Clarksville and Selected Entities

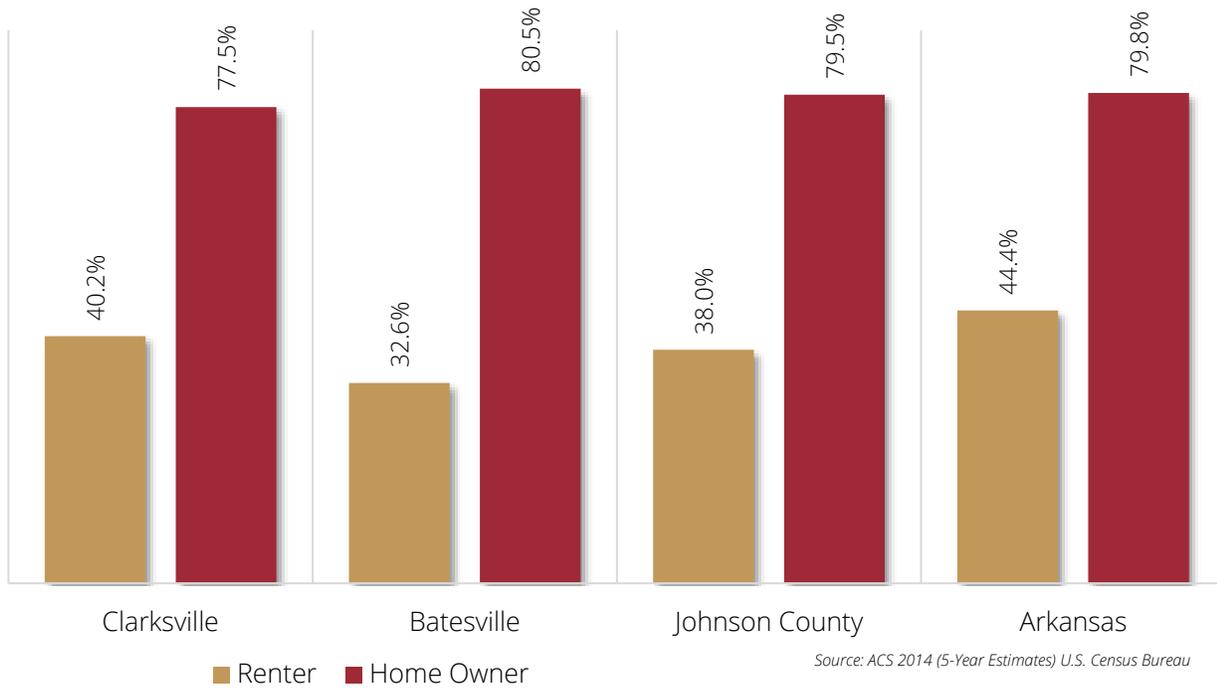


Figure 2.3.13 Age of Housing – Clarksville and Arkansas

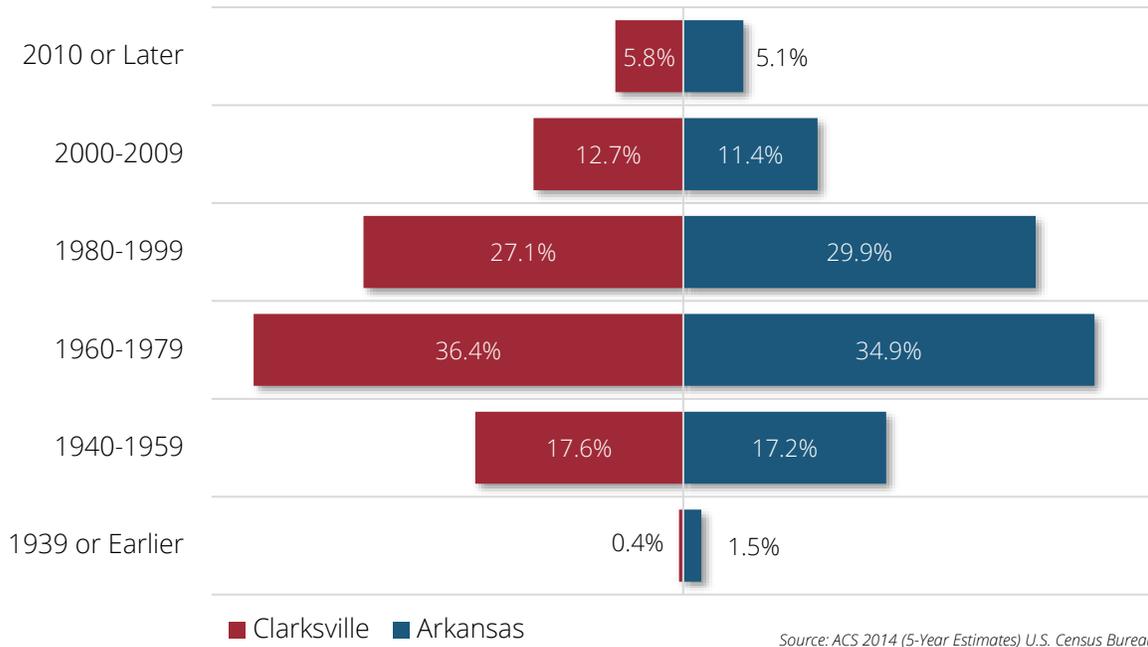
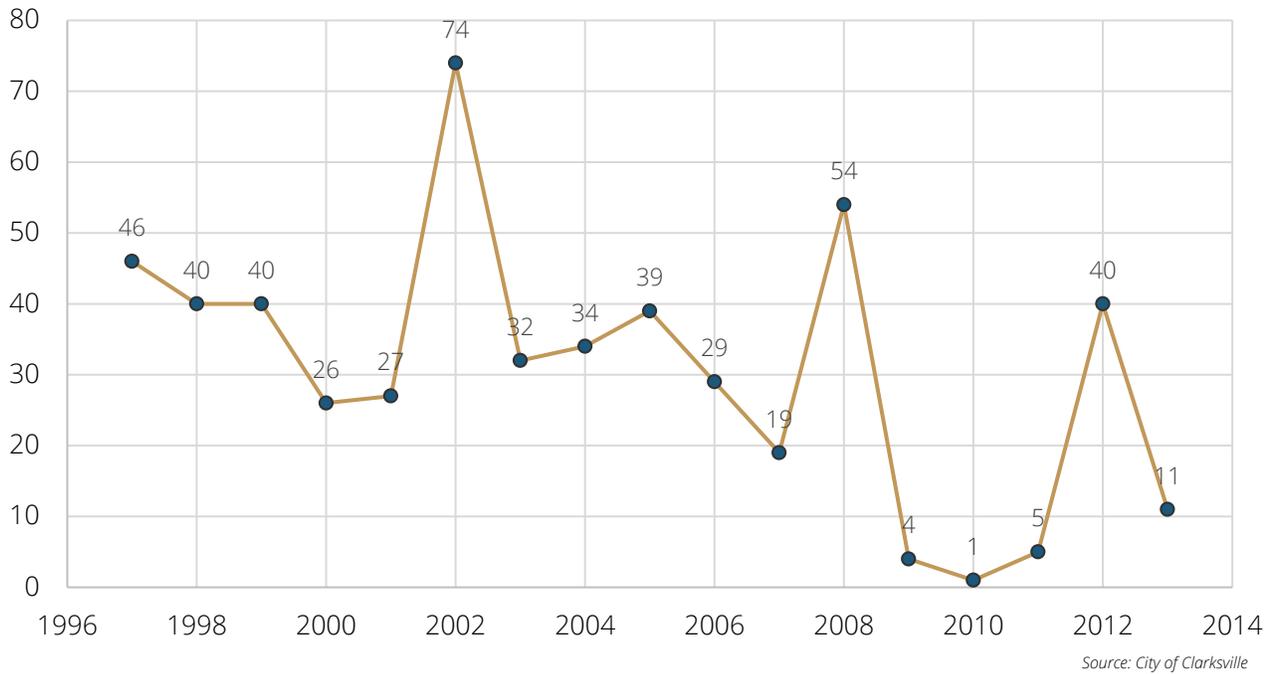


Figure 2.3.14 New Single Family Construction – Clarksville



- Clarksville has a lower percent of vacant structures than its peers and comparable rates of affordability (less than 30% of income spent on housing costs). Additionally, there have been very large fluctuations in housing starts since 2008. It appears new housing developments have generally declined over the last 10-15 years.

- Clarkville’s housing stock was built in a similar time-period to that of the state. A similar distribution indicates that Clarkville is an older city that has developed consistently overtime. This likely also means healthy amounts of new construction prevent an over accumulation of dilapidated structures.

Transportation

Table 2.3.15 Distance to Work – Clarkville

Miles	Clarkville Residents	Workers in Clarkville
Less than 10	45.2%	42.3%
10 to 24	15.0%	17.7%
25 to 50	6.0%	8.3%
50+	33.8%	31.8%

Source: U.S. Census

Figure 2.3.16 Travel Time to Work – Clarkville and Selected Entities

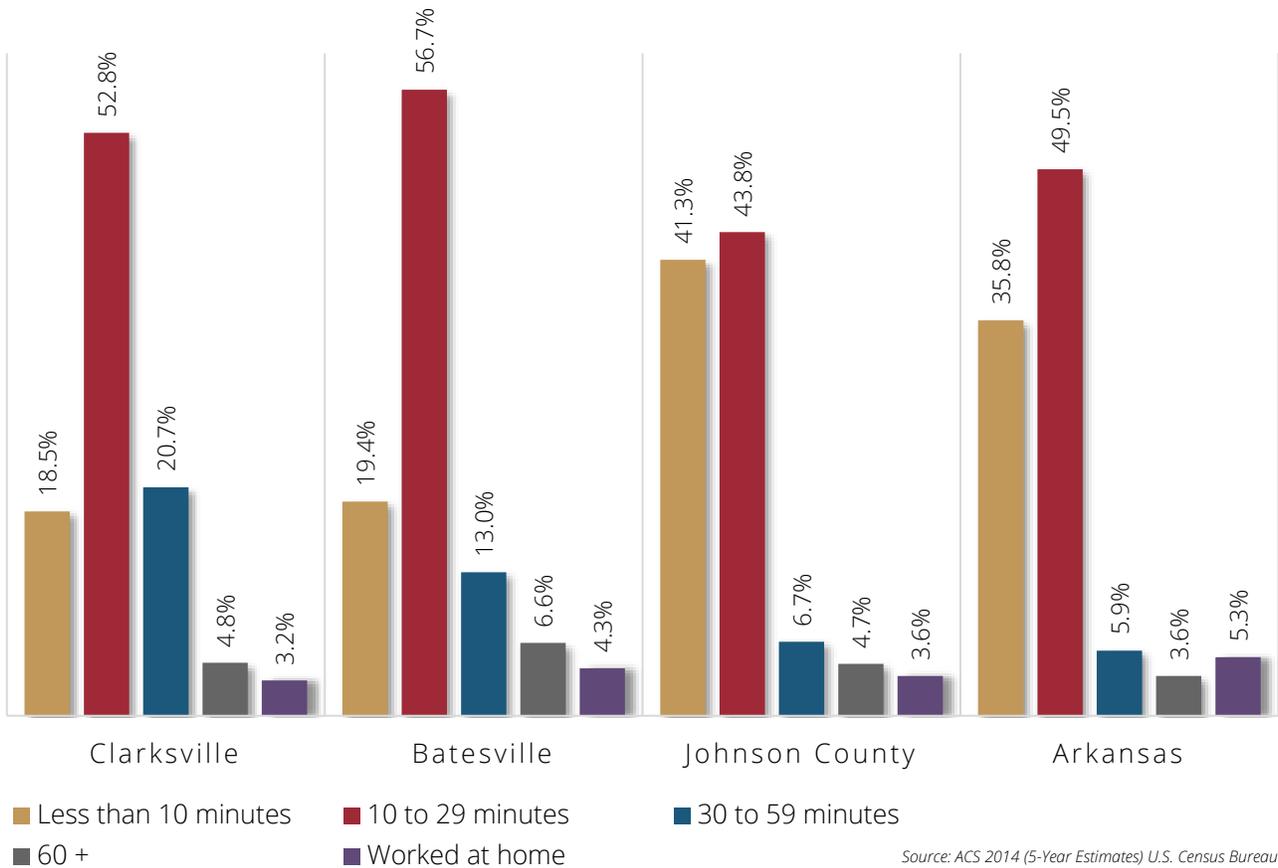
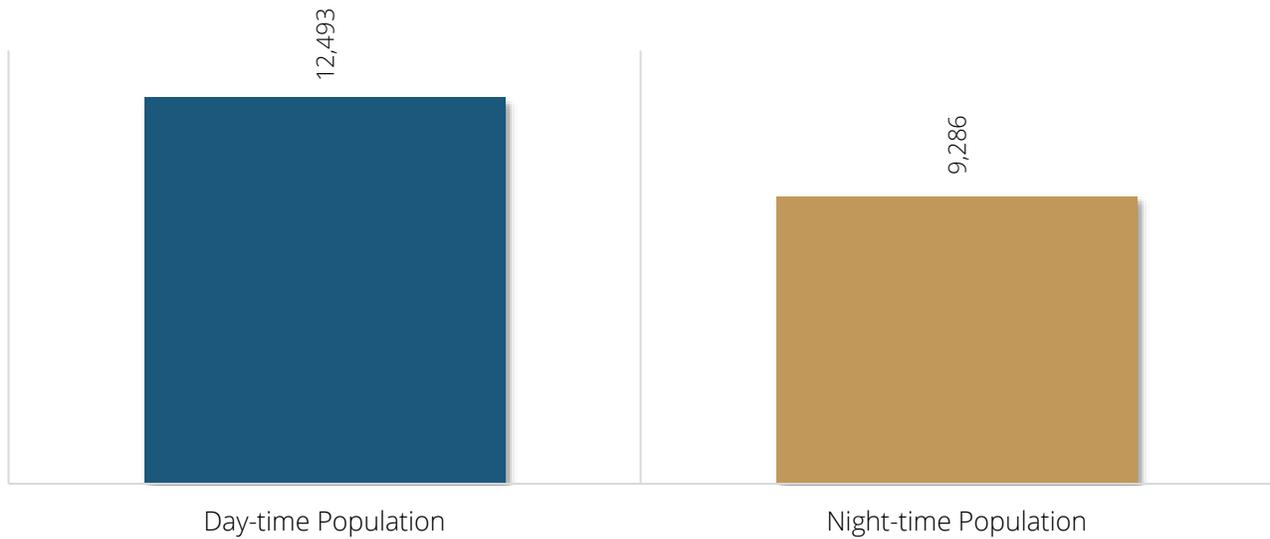


Figure 2.3.17 Population Change – Clarksville

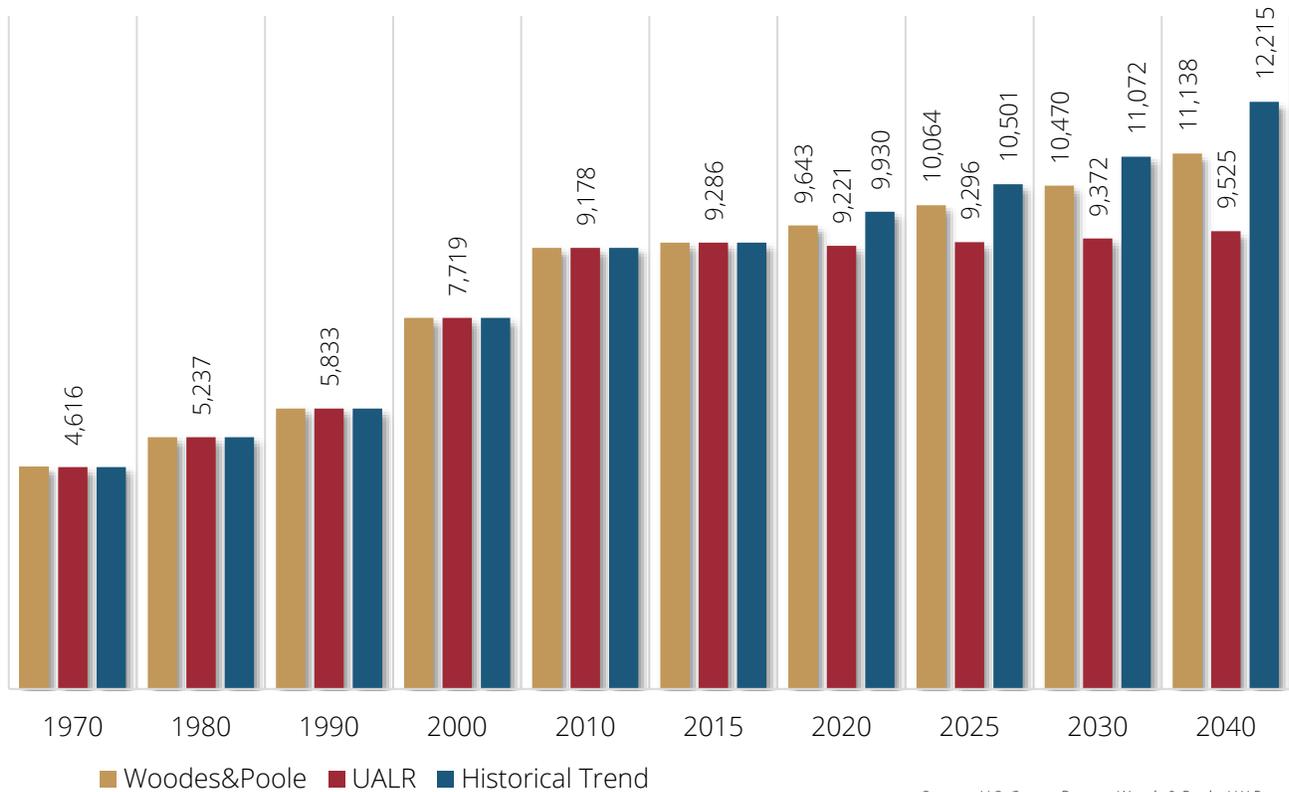


Source: ACS 2014 (5-Year Estimates) U.S. Census Bureau

- Clarksville is a jobs magnet for the local area. This creates a day time influx of population that is 34% higher than the night-time population. This is beneficial for the city's tax base.
- Many Clarksville residents also appear to commute to destinations such as Russellville, Little Rock, and Fort Smith for work.
- Clarksville has over 5,000 workers commuting into town each work day. This statistic should be further explored to see if opportunities exist to make these individuals residents of Clarksville.
- Clarksville has 45% of its residents living closer than 10 miles to work and 33% living further than 50 miles from work. Workers who only work in Clarksville, but do not live there, have a nearly identical distribution. This means Clarksville is simultaneously a job's magnet and suburban community.

Population Change Scenarios

Figure 2.3.18 Population Change Scenarios – Clarksville



Clarksville has been experiencing population growth since the 1970's, but how will Clarksville growth patterns change in the coming decades? The Woods and Poole projection show potential population growth of 1,200 people by 2030 and nearly 2,000 people by 2040. The UALR projections indicate more conservative growth rates showing almost no growth by 2030 and 300 people by 2040. Both of these projections are based on extensive data analysis at the county level applied to the city, but what does the population look like if it the community continues to grow the way it has historically? The historical trend line based on a regression analysis exceeds the Woods and Poole economic based projection.

Most indicators show continued population growth in Clarksville and current demographic trends are also supportive of this, but Clarksville has the opportunity to impact how and where this growth will occur. Will manufacturing continue to be the driving force of the city's economy? Will new economic development partnerships be pursued by the university and the city? Can the city continue to pursue quality of life improvements that may attract higher wage employment and workers? All of these ideas and questions need to be investigated in order to help direct the city's future.

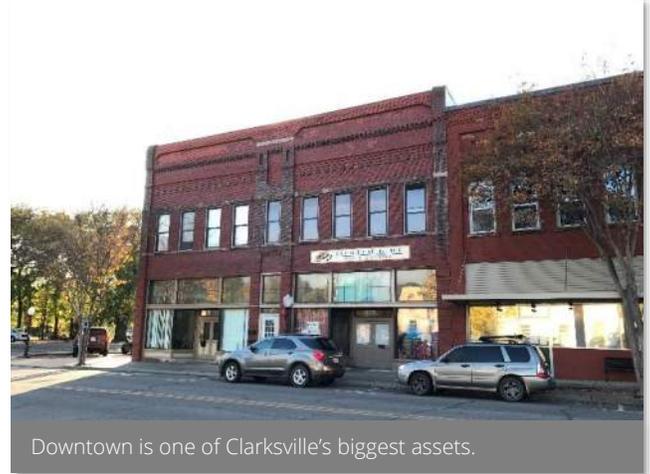
THREE: VISION AND GOALS

3.1: Major Issues

Connecting Downtown and the University of the Ozarks

A city's downtown is not only a unique destination for its residents, it is also the heart of the community and a physical representation of its heritage. What sets apart a downtown from other areas of a city is the opportunity it lends individuals to walk from storefront to storefront, experiencing the city in a personal way connecting the present with past generations. The same experience cannot be achieved through a car window.

Less than half a mile north of downtown, a key demographic attracted to historic and walkable areas like downtown is concentrated en masse at *U of O*. In the last decade generational preferences have shifted toward placing higher value on the experiential aspect of college life. Universities have engaged in an arms race over student amenities. Students not only want a good education, they want a college campus and community environment that will make the college experience special. A funky college town with a nice downtown has become an expected amenity.



Downtown is one of Clarksville's biggest assets.

Beyond being an important college recruiting tool, a vibrant downtown makes the community more economically and socially dynamic and vibrant.

Though an important college recruiting tool, having a vibrant downtown has many more important benefits for the community as a whole. It promotes quality of life, and makes the community more attractive for outside investment and growth. Downtowns almost always yield higher rate of tax revenue for the amount of public money invested in

infrastructure than any other part of the community, meaning downtown often helps subsidize infrastructure costs in other portions of the city. In short, a vibrant downtown makes the entire community more economically and socially dynamic and vibrant.

Few cities are lucky enough to have a college campus close to downtown. Those that do are increasingly working to capitalize on that advantage by strengthening the connection between their downtown and college/university. Bridging the gap between downtown and the *U of O* should be a top priority. This will require altering the physical environment along College Avenue between *U of O* and downtown to be more pedestrian and bike friendly with uses that attract students and encourage pedestrian activity.

Downtowns almost always yield a high rate of tax returns for the amount of infrastructure invested – this helps subsidize infrastructure in other areas of the city.

College students are flexible with transportation options: most do not mind walking or biking to class, although many have access to a car. Downtown's proximity to *U of O* makes it a prime location for college-oriented businesses such as a bookstore, ice cream/coffee shop, and even student housing. Filling in vacant storefronts and areas could spur growth and development of available lots that could jumpstart downtown.

Connecting Downtown and the University of the Ozarks in 2040?

What does this mean for Clarksville's downtown and college in 2040? Here are some items the plan should address:

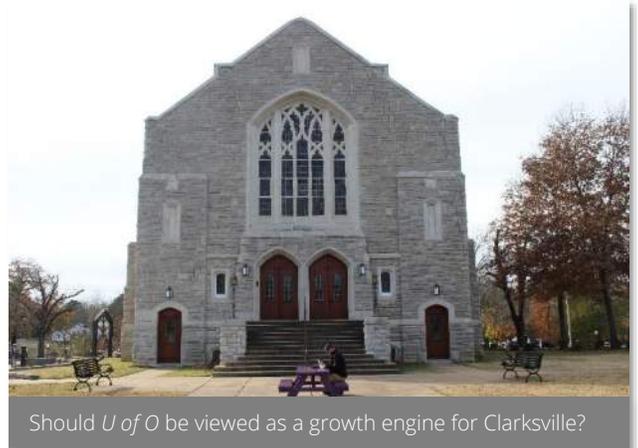
- *Investing in College Avenue* – Should the City of Clarksville and the *U of O* invest in College Avenue between downtown to strengthen the link between downtown and *U of O*?
- *Downtown Redevelopment* – Should Clarksville follow national trends and numerous positive case studies and place greater focus on redeveloping downtown?
- *U of O Investment Downtown* - Could student housing downtown bring a much-needed breath of fresh air to downtown? Could *U of O* play an important role in downtown redevelopment?
- *Connectivity* – The city is examining ways in which it can connect its two greatest assets. Are bike paths or shared-use trails possible solutions to bringing more college students downtown on a regular basis?

Economic Resiliency

Economic resilience is commonly known as the ability of a place or economy to withstand or recover from economic shocks, such as the loss of a major employer or new technology that can disrupt an industry. Though economic resiliency may be a growing issue in Clarksville, it is also a growing question for the global and national economies, as effects of globalization and automation (replacement of human workers with robots) are being seen and felt. A key question for this plan will be, "How can Clarksville become more economically resilient to withstand change in the future?"

Why should this topic be a concern? Clarksville is a jobs magnet. Over 5,000 workers commute into Clarksville each day from areas surrounding the city. That figure represents a sum that is greater than half the population of the entire city. Clarksville's economy is heavily focused on manufacturing, with over 30% of local employment in that sector. Furthermore, Clarksville has two major employers that account for a large percentage of the city's employment base. As such, the city's economy is highly dependent upon these employers and that economic segment. With the rising threat and specter of automation further affecting employment in this economic sector, should the city work now to insulate itself from any possible future jobs losses in this industry segment or others?

Clarksville is heavily invested in the manufacturing sector, composing over 30% of the local employment base. How might automation affect the local economy?



Should *U of O* be viewed as a growth engine for Clarksville?

Declining incomes are an area of concern for the city. Clarksville has seen drops in both its median household incomes and per person incomes over the last 25 years. Conversely, poverty rates in the community have risen. These issues are interrelated. Should the city work at attracting more employment opportunities that will support a larger middle class?

Growth at University of the Ozarks is outstripping the growth of Clarksville as a whole. In one year, 2015-2016 enrollment at the university grew by 5.4%. While this amount of growth isn't expected to continue, enrollment should continue to increase. This also means employment growth. The university currently stands as the city's 7th

largest employer. Should the community rethink its view of the university? Should the city invest in economic development opportunities and infrastructure that will help ensure the continued success of the university?

Clarksville's Economy in 2040?

What does all of this mean for Clarksville's economy in 2040? Here are items the plan should address:

- *Attracting New Industry* – What market segments should economic development efforts be focused on in the next 25 years?
- *Entrepreneurship* – Retention of a greater segment of *U of O* graduates could greatly benefit the community. Could programs be created to help encourage entrepreneurship, help retain graduates and give rise to homegrown employment?
- *Declining Incomes* - What strategies can be employed concerning trends with the increase of poverty, declining wages, and lower education attainment rates?
- *What is U of O?* – Should the community view of *U of O* change to that of an economic driver? Though a private educational institution, should the university be viewed in the same way other major employers are? Can the city and *U of O* work together as community development partners?

Transportation and Infrastructure

The infrastructure in a city and the tax base that supports it are essential to continued growth. The health of both the tax base and infrastructure in a city are directly related. A city cannot provide adequate infrastructure without an adequate tax base, and an economy to create a tax base is enabled by good infrastructure. As such, discussion of transportation, infrastructure, and future development are linked in this plan.

Clarksville has a small population but still suffers from traffic congestion, particularly near Clarksville High School. Clark Road reaches maximum capacity in afternoon hours, and the two-lane road quickly becomes clogged as high school students and parents attempt to return home. This important collector road is traveled by large numbers of residents in the city, but it is not operating in a manner that serves the city appropriately. Current widening projects will ensure increased roadway capacity and flow. However, this important step will likely not solve the traffic issue. Are additional road connections needed in the area to better distribute traffic?

Will improvements to Clark Road be enough to alleviate traffic problems in the area long term?



While other streets in the city are in need of renovation, construction of new street connections could bring hope of infill development and a stronger tax base for Clarksville without annexation. Annexation is often viewed positively by most cities. It conveys notions of growth and expansion with more territory and more residents. It also often means funding long-term liabilities and potentially absorbing bad infrastructure. Encouraging development of new roads could increase connectivity within Clarksville, but also ensure that the city does not have to annex unnecessary land and absorb any unnecessary liabilities. Could infrastructure be used as a means to help spur infill development?

Clarksville has looming future liabilities for reinvestment within its sewer system. The city's wastewater treatment plant has a capacity of 2.5 million gallons per day. Generally, the treatment plant is adequate to meet the needs of the community. However, inflow and infiltration of stormwater is a problem within the sewer system, particularly

near downtown, and causes overflows at the treatment plant. This is often a problem within older sewer systems, either by design allowing stormwater drains to flow into the sewers or by deterioration from roots penetrating lines. Neither are cheap or easy to fix. As the reinvestment is made, should future development and redevelopment align with planned utility improvements? Can existing infrastructure, if updated, be made more efficient with infill development?

Clarksville Light and Water has made significant investments in creating a fiber optic network within the city in the last few years. High speed data access is quickly becoming a prerequisite for any business due to the need to manage data and network across multiple offices. Additionally, the utility company is currently collaborating to build a large solar array on the west side of town. Major companies are increasingly becoming more socially conscious about environmental impacts. Could these investments be leveraged to help Clarksville attract new jobs in the green economy?



Clarksville's new solar array is a major investment in clean energy. Can it be leveraged to attract new jobs?

Transportation and Infrastructure in 2040?

What does this mean for Clarksville's transportation and infrastructure in 2040? Here are items the plan should address:

- *Clark Road Area Traffic* – School traffic and siting has made Clark Road a traffic problem. Could new road connections help alleviate traffic problems?
- *New Roads* – Could the construction of new roads and streets help spur new infill development and foster a stronger local tax base?
- *Development/Infill* – As Clarksville reinvests in its aging infrastructure, should development be encouraged to take full advantage of such reinvestment?
- *Clean and Green* – Can the city's investments in fiber-optic and solar energy be leveraged to help attract jobs and industries in the clean economy?

Community Image and Quality of Life

In the last twenty years, people have begun to change their priorities regarding where they work and live. People used to move to cities where there were plentiful opportunities for work, but now, they are deciding where they want to live, and looking for a job there. A strong economy is the basis for a healthy city, but that alone cannot attract new residents. Factors such as parks, trails and unique businesses combine to create a quality of life that sets some cities apart from others. Over the next 25 years, these factors will play a large role in defining how and if many communities grow.



Investment in quality of life and recreation is a key desire of the community.

The Marvin Vinson Center is a point of pride for Clarksville residents. It features unique programs and amenities that attract users from across the region, including nearby Russellville. The city has also reinvested in older parks such as Cline Park with trails and new equipment. However, community desire and support is building for additional investments in recreation.

Clarksville's trail system is well used and loved by the community. It represents a pioneering investment the city has made, and a cherished community amenity. Most community members want to see continued expansion of the trail system. However, the city's budget is limited and other investments are desired as well.

Clarksville's ballfields are spread across the community at several different sites. Some community members want to consolidate these facilities along with additional soccer facilities in a single sportsplex either through expansion adjacent to the Marvin Vinson Center or construction of a new facility. Such a facility would allow Clarksville to host more baseball/softball tournaments, which will attract teams and bring in tax revenue from across the state and region. Moving forward, what investments should the city make in youth sports and outdoor recreation? Should the city focus efforts on expansion of the trail system? Can all priorities be funded?

Clarksville is one of Arkansas' oldest communities. While many areas are rich with history and character, some neighborhoods have become run down and blighted. The community engagement process resulted in a clear and loud desire to see stronger code enforcement within the community. This need for and desire to see stronger code enforcement applies to many of the city's main corridors as well.

The community engagement process resulted in clear and loud support for stronger code enforcement to improve community aesthetics and protect property values.

Many properties are cluttered and junky, portraying a poor image of Clarksville to visitors. Should the city examine its current method of code enforcement, and take steps to aggressively pursue code enforcement? How can investment in blighted neighborhoods be encouraged? What programs and policies are needed to support private reinvestment and strengthen the city's enforcement tools?

Clarksville Community Image in 2040?

What does this mean for Clarksville's quality of life in 2040? Here are items the plan should address:

- *Extending the Trails System* – The city boasts beautiful trails for pedestrians and cyclists. Should the city examine extending trails to connect to different neighborhoods and important parks?
- *Sports Complex* – Clarksville's parks are widely enjoyed. Should additional investments be made to build a centralized sports complex?
- *Code Enforcement/Corridor Enhancement* – Clarksville has a number of major arterial entrances to the city that need beautification. How can the city take steps to improving first-impressions for visitors? Should code enforcement be heavily emphasized?

3.2: Vision Statement

Clarksville will be a safe, charming college town of choice with a resilient 21st century economy and an excellent quality of life and place. The community will be one that invests in amenities for its residents, and preserves its natural and cultural heritage and assets. The city will provide an equitable regulatory process that creates a strong sense of place and protects private property.

The vision is to be supported through the following guiding principles:

1. *Preserve Open Space and Environmentally Sensitive Areas.*
2. *Take Advantage of Existing Community Assets.*
3. *Foster Walkable Neighborhoods Offering a High Quality of Life.*
4. *Create a Range of Housing Opportunities and Affordable Choices.*
5. *Mix Land Uses for Pedestrian-Friendly Places.*
6. *Promote Attractive Development with a Strong Sense of Place.*
7. *Provide Recreational and Cultural Amenities*
8. *Provide a Variety of Transportation Choices and High-Quality Transportation Corridors.*
9. *Expand Economic Development Opportunities.*
10. *Ensure Policies and Processes that are Enforced and Equitable to both Citizens and Developers.*

3.3: Goals and Policies

The following goals and policies have been created to help direct action within the plan. These goals are to help with the actualization of the vision.

Goal areas:

1. *Economic Resiliency*
2. *Community Change and Development*
3. *Transportation and Infrastructure*
4. *Quality of Life/Recreation*

Economic Resiliency

Economic resilience is the ability of a place or economy to withstand or recover from economic shocks, such as the loss of a major employer or new technology that can disrupt an industry. While economic resiliency may be a growing issue in Clarksville, it's also a growing question for the global and national economies, as effects of globalization and automation (replacement of human workers with robots) are being seen and felt. The goals and policies in this section aim to insulate Clarksville from major shocks in the national economy, and to provide a roadmap towards greater economic prosperity.

Goal 1: Develop a diverse economy and prepare for potential future economic shocks.

Policy 1.1 – Actively work to identify changing economic trends driven by technological and cultural change.

Policy 1.2 – Identify and direct economic development efforts toward growing areas of the national economy.

Policy 1.3 – Actively work to recruit higher wage employers that fit Clarksville's labor force.

Policy 1.4 – Work to support and retain existing local employers.

Policy 1.5 - Support public education, higher education, and skills training to maintain and equip a skilled labor force.

Policy 1.6 – Encourage collaboration between education providers and local employers on academic programming.

Policy 1.7 – Leverage investments in fiber optics and clean energy to recruit new companies to Clarksville.

Goal 2: Create an economic atmosphere that is ripe for entrepreneurship.

Policy 2.1 – Encourage interactions between *U of O* and Clarksville High School students to foster creativity and community pride.

Policy 2.2 – Create incentives that help promote local entrepreneurship.

Policy 2.3 – Support creation of a business incubator.

Policy 2.4 – Explore ways to operationalize academic/research programs toward business development.

Policy 2.5 – Create a robust internship program to place *U of O* students with local employers.

Policy 2.6 – Support and encourage creation of a Main Street Clarksville program to encourage downtown growth.

Policy 2.7 – Foster programs to encourage use of local student talents toward community development and pride.

Goal 3: Maintain a positive business environment and attract jobs that support a larger middle class.

Policy 3.1 – Help improve the existing labor pool through targeted investments in education.

Policy 3.2 – Continue to invest in quality of life in the city to attract and retain skilled and educated labor.

Policy 3.3 – Maintain public infrastructure at a level that is desirable for private investment.

Policy 3.4 – Provide fair, transparent, and predictable city regulations for business.

Policy 3.5 – Provide efficient and fair approval processes for development.

Policy 3.6 – Ensure private investment and development is protected through use of smart, consistent code enforcement.

Community Change and Development

How will Clarksville develop and change as it grows? Clarksville has changed dramatically in the last 20 years. The community has become increasingly diverse and must continue to evolve. A well-crafted and intentional growth strategy will build a strong foundation for Clarksville's future as it regulates development, invests tax dollars, and works to attract new businesses and residents.

Goal 1: Guide and carefully direct growth in a smart and responsible manner.

Policy 1.1 – Encourage development in areas already served by city services, where service provision is most cost effective.

Policy 1.2 – Encourage development that is compatible with the natural and built environments of the surrounding area.

Policy 1.3 – Encourage development that creates long-term community value.

Policy 1.4 – Create thriving, vibrant neighborhoods, districts, and corridors that are distinct places.

Policy 1.5 – Promote mixed-use development that combines commercial, residential, and office functions in the same building.

Policy 1.6 – Ensure new developments locate where they can be properly accommodated by public infrastructure.

Policy 1.7 – Promote development that builds the city's tax base and generates sufficient tax revenue to pay for the life-cycle costs of its supporting infrastructure.

Policy 1.8 – Encourage development that provides necessary services to underserved populations.

Policy 1.9 – Adopt a comprehensive plan that plans for continued population growth through the year 2040.

Goal 2: Enhance the city's land use regulations and development review processes.

Policy 2.1 – Provide and carry out land use and building regulations that protect the health, safety, welfare, and aesthetics of the community.

Policy 2.2 – Utilize land use and building regulations to create vibrant, sustaining places that create long-term value for the community.

Policy 2.3 – Use innovative regulatory tools designed to address community problems identified in the plan such as building design standards, landscaping requirements, character zoning, etc.

Policy 2.4 – Promote use of land use tools that allow flexibility in site design and layout for innovative developments.

Policy 2.5 – Utilize land use regulations to enhance and protect key areas and corridors in the community such as city gateways, Downtown, College Hill Neighborhood, Rogers Street, and Main Street.

Policy 2.6 – Support policies that allow the construction of a variety of housing types and price ranges to meet the needs of residents of all ages and incomes.

Policy 2.7 – Provide timely and efficient review of development proposals.

Policy 2.8 – Provide fair, consistent, and transparent review and evaluation of all development proposals.

Policy 2.9 – Ensure development review is conducted to evaluate potential external impacts of development on adjacent properties.

Policy 2.10 – Ensure that the planning commission is representative of the larger community.

Goal 3: Encourage development within the heart of the city.

Policy 3.1 – Support and encourage private investment in downtown by leveraging public resources and infrastructure.

Policy 3.2 – Reinvest in the infrastructure of the city's existing neighborhoods.

Policy 3.3 – Encourage mixed-use infill development and building rehabilitation in downtown.

Policy 3.4 – Use targeted, aggressive but fair code enforcement focused on neighborhoods where blighting influences may discourage private investment.

Policy 3.5 – Encourage home ownership as a means to promote long-term community investment.

Policy 3.6 – Encourage residential infill development in the city's historic neighborhoods surrounding downtown.

Policy 3.7 – Use state and federal programs that help aid in the rehabilitation of historic buildings in the downtown.

Policy 3.8 – Provide public space that attracts residents to the Downtown Historic District.

Policy 3.9 – Use regulatory incentives to encourage downtown investment.

Policy 3.10 – Encourage the preservation and rehabilitation of Downtown historic structures.

Goal 4: Ensure diverse community voices are heard and public spending reflects the needs of a diverse community.

Policy 4.1 – Consult with minority populations in the city to make sure community amenities serve all populations.

Policy 4.2 – Encourage greater community engagement from the community as a whole and among minority populations.

Policy 4.3 – Ensure public spending is directed in a fair and transparent manner to meet the needs of the entire community.

Goal 5: Maintain the Comprehensive Plan and use it to guide future growth.

Policy 5.1 – Conduct annual reviews of the comprehensive plan and land use regulations to ensure they remain applicable and up-to-date.

Policy 5.2 – Clarksville's land use regulations will be consistent with and designed to carry out the provisions of the comprehensive plan.

Policy 5.3 – Future street construction will conform to the transportation component of the plan.

Policy 5.4 – Development and rezoning proposals will be evaluated in terms of their compatibility with the comprehensive plan.

Policy 5.5 – Review all developments in relation to specific and detailed provisions that at least:

- Regulate the subdivision of land.

- Regulate the use of land to ensure compatibility of adjacent areas.
- Regulate drainage and protection of areas which flood or are environmentally sensitive.
- Ensure safe and convenient mobility for vehicular, bike, and pedestrian users.
- Ensure developments do not result in a reduction in any adopted level of service for infrastructure.
- Ensure development does not outstrip the capacity of the land or infrastructure supporting it.

Quality of Life/Recreation

Quality of life and recreational amenities for a city are important for community growth in the 21st century. Generational changes in priorities for work/life balance are changing the criteria millennials and baby boomers use in choosing where to live, making quality of life increasingly important. Today, people are moving to the place they want to live and looking for a job. To remain competitive in attracting growth it is essential that Clarksville provides competitive quality of life amenities for its residents.

Goal 1: Develop a connected recreational framework throughout the city.

Policy 1.1 – Connect all parks, schools, and large commercial areas through pedestrian infrastructure to improve accessibility of amenities.

Policy 1.2 – Invest in parks in areas that are currently underserved to improve city-wide parks coverage.

Policy 1.3 – Maintain a Parks Master Plan to guide park development, redevelopment, and programming.

Policy 1.4 – Ensure streets are complete by providing for pedestrians, cyclists, and drivers.

Policy 1.5 – Develop both active and passive recreation opportunities and expand recreational programming.

Policy 1.6 – Pursue partnerships with community institutions to leverage the impact of city recreational facilities.

Goal 2: Promote an enhanced community image and quality of life.

Policy 2.1 – Create a landscaping ordinance to enhance the quality of new development.

Policy 2.2 – Enforce existing codes regarding blighted structures and other undesirable violations in order to improve community image.

Policy 2.3 – Use development regulations and public investment to improve the image of Clarksville's key gateways.

Policy 2.4 – Provide space for cultural events that have live music and specialty foods to help bring the community together.

Policy 2.5 – Embrace Clarksville's identity as a college town.

Policy 2.6 – Pursue partnerships with the *U of O* to provide cultural programming that can have a community-wide benefit.

Policy 2.7 – Encourage community institutions to provide festivals and programming that enhances quality of life.

Policy 2.8 – Actively support and promote *U of O* athletics programs.

Transportation and Infrastructure

Transportation and infrastructure is an important issue of Clarksville's future growth. In order to remain a competitive marketplace for new job growth, and new residents, the transportation network and infrastructure will continue to need investment. The railroad, Interstate 40, and several major highways provide a strong foundation for goods and population movement into the city.

Goal 1: Provide a multimodal transportation system that benefits all residents

Policy 1.1 – Provide improved roadway facilities to improve east-west traffic flow across Clarksville.

Policy 1.2 – Focus transportation construction investments on corridors that will relieve traffic and improve connectivity.

Policy 1.3 – Improve connectivity between the downtown and U of O.

Policy 1.4 – Bike and pedestrian users will be given consideration in the planning and design of all transportation facilities in the planning area.

Policy 1.5 – Bike and pedestrian facilities will be constructed as part of all new development and transportation facilities according to the provisions of this plan.

Policy 1.6 – The city will monitor mobility and access options for citizens with disabilities as part of the development process.

Policy 1.7 – New developments must provide for the interconnection of existing and proposed streets to permit the orderly expansion of the city's transportation system.

Policy 1.8 – Access management will be considered in revision of development regulations and evaluated upon reviewing all development plans.

Goal 2: Coordinate growth and utilities in the most efficient and effective manner.

Policy 2.1 – Control the extension or provision of utilities in order to carry out the provisions of this plan.

Policy 2.2 – Ensure no approved development will result in a reduction in the adopted level of service for public infrastructure.

Policy 2.3 – Require all developments within the Planning Area Boundary to be served by central water and wastewater services, when technically feasible.

Policy 2.4 – Require all developments to install public utilities and become annexed to the city as a condition of tying onto city utilities.

Policy 2.5 – Encourage development to occur where it can be supported by the transportation and utility infrastructure.

Policy 2.6 – Prioritize the maintenance of existing utility and transportation infrastructure over the expansion of new facilities.

Policy 2.7 – Promote development patterns such as mixed-use development that yield higher tax revenue per acre.

Policy 2.8 – Pursue policy actions that provide adequate funding for the maintenance and life-cycle costs of the city's transportation infrastructure.

Policy 2.9 – Ensure local tax policies provide adequate revenue to meet the city's ongoing liabilities.

Goal 3: Adequately address issues of drainage and flood hazards.

Policy 3.1 – Ensure developments adequately address drainage to ensure new drainage problems are not created.

Policy 3.2 – Promote the use of green infrastructure as a way to work with the environment to prevent localized flooding risks and drainage problems.

Policy 3.3 – Investigate the possibility of improving the levee protecting downtown to decrease costs of flood insurance.

Policy 3.4 – Provide regulations that ensure drainage issues caused by development are properly mitigated.

Policy 3.5 – Pursue innovate programs and policies like a stormwater utility to ensure adequate mechanisms are in place to finance public investment in drainage infrastructure.

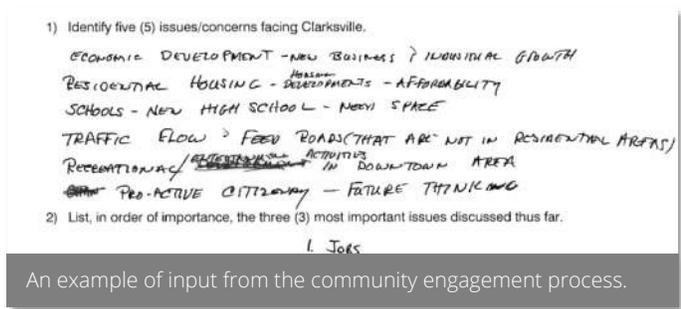
3.4: Community Outreach

Community Engagement Process

Community engagement factors heavily into the findings and recommendations of this plan. This is because Clarksville residents and stakeholders ultimately know their community better than anyone. Accordingly the plan process provided numerous opportunities for community engagement. These include:

- Public Steering Committee
- Community Charrette
- University Area Community Workshop
- Steering Committee Workshop
- City Council/Planning Commission Workshop
- City Staff Workshop
- Key Person Interviews
- Stakeholder Group Interviews
- Interactive Website
- Public Plan Review and Presentations

Community engagement factors heavily into the findings and recommendation of this plan. Ultimately, Clarksville residents and stakeholders know their community better than anyone.



Community Engagement Findings

Below is a short summary of the emergent and overarching themes discovered in the community engagement process. They are broken down into four key themes. A full summary of the findings of each community engagement opportunity is provided in the appendix.

Economy

- *Economic Stability and Talent Retentions (U of O)* – What happens if one of Clarksville’s large industries shuts down? Community should place greater focus on working to retain *U of O* graduates.
- *Job Markets/Job Growth/Missing Middle Class* – Clarksville has done well in recruiting an abundance of jobs within low wage employment sectors. The community should focus efforts to attract more jobs/industries that supply middle class incomes. Regardless, the city needs more jobs.
- *Leverage Infrastructure Advantages* – Being an electric utility and high-speed broadband provider gives the City of Clarksville numerous advantages over other cities. These advantages should be leveraged to attract jobs.

Quality of Life/Community Image

- *Trail System Expansion* – Clarksville’s trail system is well used and a point of community pride. Residents and stakeholders want to see further expansion and investment in the system.
- *Blighted Neighborhoods* – Likely one of the most frequently stated concerns, a lack of adequate code enforcement has helped result in neighborhood blight. Community members are concerned about neighborhood decline, lowering property values, and associated increases in crime.

- *Poor Gateways* – Community members are concerned about Clarksville’s front door. The city’s gateways don’t portray the best side of Clarksville and its beautiful landscape.

Infrastructure/Transportation

- *Downtown Levee* – Much of downtown Clarksville rests within the floodplain, making new construction and rehabilitation of historic structures a significant challenge. Improving the levee could fix this issue.
- *Traffic/Connectivity* – Residents and stakeholders are concerned about traffic along the Clark Road corridor particularly during the school year. A need to relocate Hwy 103 to the west end of Clarksville from its current route through the *U of O* has also been frequently discussed.
- *Broadband Capacity Advantages* – The City of Clarksville owns a high-speed fiber loop, a unique and important asset for a 21st century city. This infrastructure should be leveraged to attract jobs to the area.

Community Change and Development

- *College Avenue Corridor* – Clarksville should fully embrace its college town identity. This should start with strengthening the connection between downtown and the *U of O* along College Avenue.
- *Downtown Focus and Redevelopment* – Downtown is a tremendous asset and is slowly improving. More focus should be given to downtown to aid in its resurgence.
- *Changing Demographics* – Clarksville is becoming more culturally and ethnically diverse and poverty is rising while incomes decline. These changes mean a changing Clarksville, and changing institutional structures are needed to address new issues and opportunities accompanying such change.

3.5: Alternative Growth Scenarios

Introduction

Although its population growth has slowed in recent years, Clarksville has grown by nearly 20% since 2000. The city has a stable economy and the city's crown jewel, the University of the Ozarks has seen strong enrollment growth. The city's regional significance, with a growing and thriving college campus and strategic location off Interstate 40, create numerous opportunities for growth.

Clarksville's development pattern is unique compared to similar cities in Arkansas. Batesville and Magnolia, two cities with similar populations and geographic amenities, compare in some aspects to Clarksville's development, but Clarksville possesses unique advantages over the two. The city is located close to Interstate 40, a high traffic route that sees thousands of travelers every year. Opportunities that accompany the city's situation are numerous, including economic development and improvements of appearance to travelers. *U of O* adds a certain dynamism and energy to the city that would otherwise be lacking. In short, Clarksville has numerous advantages that will allow it to remain a thriving and growing community, a fate that will not be shared by many rural communities over the next 40 years.

Because of this, it is important to conceptualize the forms the city's growth may take and how it might be managed for public benefit. The following are three scenarios that identify potential future growth patterns for the city and the associated positive and negative impacts associated with each.

Scenario 1: Existing Trends/Market Driven Scenario

This scenario emphasizes growth as it has occurred over the last 20 years. Development follows primarily suburban patterns with commercial development locating on cheap previously undeveloped land or along high-traffic older-residential corridors, sometimes called Sprawl. Housing developments are distributed across a wide area of the city typically leapfrogging undeveloped greenfields. New housing comes in the form of single-family subdivisions and limited multi-family housing. Traffic is funneled to a few key corridors with limited interconnectivity of streets. A gridded street pattern is not used. Focus is placed on outward expansion and growth of the city. Older areas decline as reinvestment in older areas of the community is limited.

This scenario focuses on single-family suburban development patterns.



Impacts and Opportunities

- 1) Land development will likely be cheaper, assuming adequate access to utilities.
- 2) Will likely result in higher utility rates long term due to expanding utility system.
- 3) May exacerbate problem with current functionally obsolescent retail spaces on Main Street.
- 4) Politically very easy to implement as it results in less land use control.
- 5) May not match market demand for changing generational preferences.
- 6) Will lead to a fragmented and dispersed retail market, which may weaken it.
- 7) Less concern regarding the lifespan and impact of garden style apartments.
- 8) May lead to increased vacancy within established neighborhoods.
- 9) May result in increased stormwater hazards.
- 10) Likely to have neutral or negative effects on student/faculty recruitment at *UofO*.

Scenario 2: Downtown, University, and Infill Scenario

The second scenario focuses on infill development in the existing developed portions of the city, mainly Clarksville's core. Development follows a pattern more in keeping with Pre-WWII development styles, focusing on gridded streets and connectivity. Infill development within and surrounding existing developed portions of the city is strongly encouraged as means to lessen the need for new infrastructure. As such, vacant undeveloped lots within utility access are utilized for a mix of single-family development and high-quality small-scale multi-family development. Redevelopment of downtown and connecting with the University is a key objective. Outward expansion is limited as extension of sewer and water utilities is discouraged except where desirable to better utilize main lines, or where sewer lift stations are not needed.

This scenario focuses on reinvestment in the city's core areas near downtown and the University of the Ozarks.



Impacts and Opportunities

- 1) Land development will likely be more expensive due to focus on redevelopment and infill.
- 2) Will likely result in stable or lower utility rates long term due to limited expansion of utility system.
- 3) May have positive or neutral effect on current functionally obsolescent retail spaces on Main Street.
- 4) Politically difficult to implement as it results in more land use control.
- 5) Will likely help match market demand for changing generational preferences.
- 6) Retail market will become more locally focused which could provide resiliency in the coming shift to online retail.
- 7) More concern over how infill development is carried out, could potentially negatively impact existing residents.
- 8) Likely to result in increased stormwater hazards.
- 9) Will lead to increased occupancy within established neighborhoods.
- 10) Likely to have positive effects on student/faculty recruitment at UofO.

Scenario 3: Natural Preservation Scenario

The third scenario focuses on preserving Clarksville's unique and beautiful natural surroundings. Focus is given to preserving environmentally sensitive areas such as floodplain, areas of steep topography, and forested tracts of land. Development within these areas is strongly discouraged. But, development is relatively unconstrained outside of these sensitive areas and allowed to follow mostly market demands, except preservation of open space is strongly encouraged within new housing developments. Zoning tools incentivize the use of cluster subdivision design to create open space amenities within dense, clustered single-family and/or mixed-density developments. Commercial development is largely unconstrained except to ensure development sites preserve tree canopy and add generous amounts of landscaping through the development process. Outward expansion is neither limited or encouraged except where development would encroach on areas desired for preservation.

This scenario focuses on preserving the city's environmental assets.



-
- 1) Land development will likely be cheaper, assuming adequate access to utilities.
 - 2) Will likely result in higher utility rates long term due to expanding utility system.
 - 3) May exacerbate problem with current functionally obsolescent retail spaces on Main Street.
 - 4) Politically difficult to implement as it results in more land use control.
 - 5) May require the taking and purchase of some environmentally sensitive property.
 - 6) May not match market demand for changing generational preferences.
 - 7) Will likely result in increased scenic beauty and recreation opportunities.
 - 8) Will lead to a fragmented and dispersed retail market, which may weaken it.
 - 9) Less concern regarding the lifespan and impact of garden style apartments.
 - 10) May lead to increased vacancy within established neighborhoods.
 - 11) Will result in decreased stormwater hazards.
 - 12) Likely to have positive effects on student/faculty recruitment at *UofO*.

FOUR: THE PLAN

4.1: Place Type Plan and Standards

Introduction

Many land use plans focus on the separation of different types of land uses. This approach often fails to take into account whether or not proposed land uses actually create any adverse influence on one another. In other words, the strict separation of land use types becomes an end in itself and not an element of the urban design process. In departure from this approach, this plan emphasizes the nature of land uses. Thus, the size, use intensity, traffic generation, and the overall impacts of a development become more important than the actual activity conducted on the property. The final product is the future place type map that will inform zoning in the city based upon the place type transect shown below.

Natural

(N-CON) Conservation Area

Character: Areas intended for natural preservation and resource conservation. These areas include environmentally sensitive areas such as floodplains/floodways, wetlands, or areas with slopes exceeding 20%. Development is not intended for these areas, however, uses that have little or no impact on the surrounding areas or that can be mitigated may be allowed. These areas have passive recreation facilities such as trails.

Land Use: Vacant/Recreational

Density: Limited to No Development

Utility Requirements: None

Related Zoning: Open Space (New Zone)



(N-REC) Recreational Area

Character: Areas intended for recreational use. These uses include golf courses, soccer fields, baseball complexes, and other similar recreational facilities. The natural function of land in this area should be preserved. When alterations to the physical form of the land are required changes should be carefully considered to minimize impact on natural form.

Land Use: Recreational/Vacant

Density: Sparsely spread buildings that meet public functions or park needs.

Utility Requirements: Possible utility requirements

Related Zoning: All Districts



Rural**(R-RSV) Rural Reserve**

Character: Areas at the edge of the city. Typically intended for a variety of rural uses including large and small-scale farming operations and single-family residences on large lots. If sewer service becomes available the land can be changed to higher intensity land use designation.

Land Use: Agricultural/Rural Residential

Density: 1 acre + for Agricultural, Residential uses

Utility Requirements: Water

Related Zoning: A-1

**Suburban****(S-LDN) Low Density Neighborhood**

Character: Area reserved for typical single-family home developments with supporting amenities such as churches and parks. Street grid patterns and connectivity are encouraged.

General uses: Single-family homes, churches, parks

Density: 3-5 units/acre

Lot size: Min. 6,000 sq. ft. – single-family, Min. 20,000 sq. ft. – other uses

Utility requirements: Sewer and water services

Appropriate zoning: R-1

**(S-MDN) Medium Density Neighborhood**

Character: Predominantly single-family homes, townhomes, and small-scale multi-family within a typical suburban development pattern. A mix of institutional and small scale office/retail uses are allowed at key nodes and along collector streets. Grid street patterns are priority.

General uses: Single-family, small-scale multi-family, institutional, and small-scale office/retail

Density: < 9 units per acre

Lot size: Min. 6,000 sq. ft. - single-family, Min. 8,000 sq. ft. - small-scale multi-family, Min. 20,000 sq. ft. other uses

Utility requirements: Sewer and water services

Appropriate zoning: R-2, R-O (R-O limited to collector and arterial corridors.)



(S-HDN) Apartment and Mixed-Use Neighborhood

Character: A mix of low-density and high intensity residential uses including apartments, retirement centers, and institutional uses. Historic Pre-WWII development patterns with gridded streets and use mix is encouraged.

General uses: Residential uses, small-scale office/retail, and institutional uses

Density: < 30 units per acre

Lot size: Min. 10,000 sq. ft. - multi-family

Utility requirements: Sewer and water services

Appropriate zoning: R-3, R-O (R-O limited to collector and arterial corridors.)



(S-COR) Corridor Commercial

Character: Areas include commercial and office developments abutting as a liner to arterial corridors as typical commercial areas. These mainly low-rise buildings are set back with parking in front to be auto-oriented. Landscaping and architectural design create developments that provide long-term assets.

Land Use: Retail, office, restaurants, general commercial

Density: Small lots ranging to 5 acres +

Utility Requirements: Sewer and water services

Related Zoning: C-2



(S-ODC) Outdoor Display Commercial

Character: These areas are the same as Corridor Commercial but allow outdoor display. Areas include commercial and office developments abutting as a liner to arterial corridors as typical commercial areas. These mainly low-rise buildings are set back with parking in front to be auto-oriented. Landscaping and architectural design create developments that provide long-term assets.

Land Use: Retail, office, restaurants, general commercial

Density: Small lots ranging to 5 acres +

Utility Requirements: Sewer and water services

Related Zoning: C-3



(S-CEN) Commercial Center

Character: The largest commercial centers in the city. The commercial centers include large box stores with expansive parking lots. The box stores will often be connected and create large shopping centers. Large box stores are accompanied by a mix of office, retail, and restaurants benefitting from the high traffic created by these large shopping centers. These areas are meant to be located near high-traffic arterials and I-40 interchanges.

Land Use: Retail, office, restaurants, open display commercial

Density: 3 + acres

Utility Requirements: Sewer and water services

Related Zoning: C-3



(S-RSD) Rogers Street District

Character: A special character area intended to preserve the character of Rogers Street with a mix of historic homes and new high-quality commercial. These areas feature mainly low-rise buildings with parking to the side or rear. Landscaping and architectural design are required and create developments that provide long-term assets.

Land Use: Retail, office, restaurants, general commercial

Density: Small lots ranging to 5 acres +

Utility Requirements: Sewer and water services

Related Zoning: Rogers Overlay District



Urban

(U-DTN) Downtown

Character: The historic heart of the city with numerous multi-story buildings accommodating a mixture of uses inside individual structures. Buildings are built up to the public right of way and pedestrian amenities are provided for transportation. Focus is given to pedestrians over cars. Parking for buildings is primarily found on-street. There is a well-connected grid network of streets. The area has well-designed streetscapes and public spaces that vary in nature. Residential uses are located above commercial or office functions.

Land Use: Retail, office, restaurants, lofts, public buildings, churches, urban scale multi-family

Density: 1.8 Floor Area Ratio

Utility Requirements: Sewer and water services

Related Zoning: C-1



(U-CHD) College Hill Neighborhood

Character: Neighborhood surrounding the University of the Ozarks. The campus is the focal point of the neighborhood. Development follows traditional neighborhood design with predominantly single-family with accessory dwelling units and small-scale multi-family such as mansion style apartments. Focus is given to use of high-quality design and materials for structures. Neighborhood has a unique vibrant and walkable character with a mix of college and neighborhood uses.

Land Use: Mixed Residential, Institutional, and Limited Commercial Uses.

Density: < 9 units per acre

Utility Requirements: Sewer and water services

Related Zoning: S-CH (New zone)



(U-WND) Walkable Neighborhood

Character: Medium density residential neighborhood characterized by development abutting the street. Garages exist, but are at back of the houses or even with the front porch. The road have on street parking and there are sidewalks and other pedestrian amenities. Town houses or other multi family structures are mixed in with single family housing. These areas can be denser than traditional urban neighborhoods depending on how much multi-family housing is constructed.

Land Use: Single-Family Residential, Small-Scale Multi-Family

Density: 12 units per acre or less

Utility Requirements: Sewer and water services

Related Zoning: R-T (New Zone)

**Special**(S-INS) Institutional Campus

Character: These areas are composed of large scale campuses. These campuses could be hospitals, college campuses, large public schools or other similarly outlying land uses. These uses are typically disconnected from other uses. Uses have an internal focus with clustered buildings that are repetitive in use and or design.

Land Use: Office, Public, Institutional

Density: N/A

Utility Requirements: Sewer and water service

Related Zoning: S-1 (New zone)

(S-IND) Industrial Development

Character: Industrial complexes made up of large scale industrial operations. These areas preclude other types of uses from occurring. The developments are internally focused and usually require large scale buffering and landscaping between adjacent uses. Typically located away from the city center, but close to major transportation amenities.

Land Use: Industrial

Density: 1 acre +

Utility Requirements: Sewer and water service

Related Zoning: I-1, I-2



(S-SID) Semi-Industrial Development

Character: Areas intended for commercial and service/sales operations with a quasi-industrial or similar character. These includes commercial operations with the outside storage of raw materials. Some limited industrial-type uses may be allowed. Sites are typically located along lower traffic commercial corridors away from main retail shops and shopping centers.

Land Use: Sales/service operations, commercial uses with industrial character

Density: ½ acre +

Utility Requirements: Sewer and water service

Related Zoning: I-R (New Zone)

*(S-PUB) Public-Semi Public*

Character: These areas are composed of small scale facilities such as churches and government offices. It may also include social service operations. Additionally included are utility facilities.

Land Use: Public, Institutional, Utilities

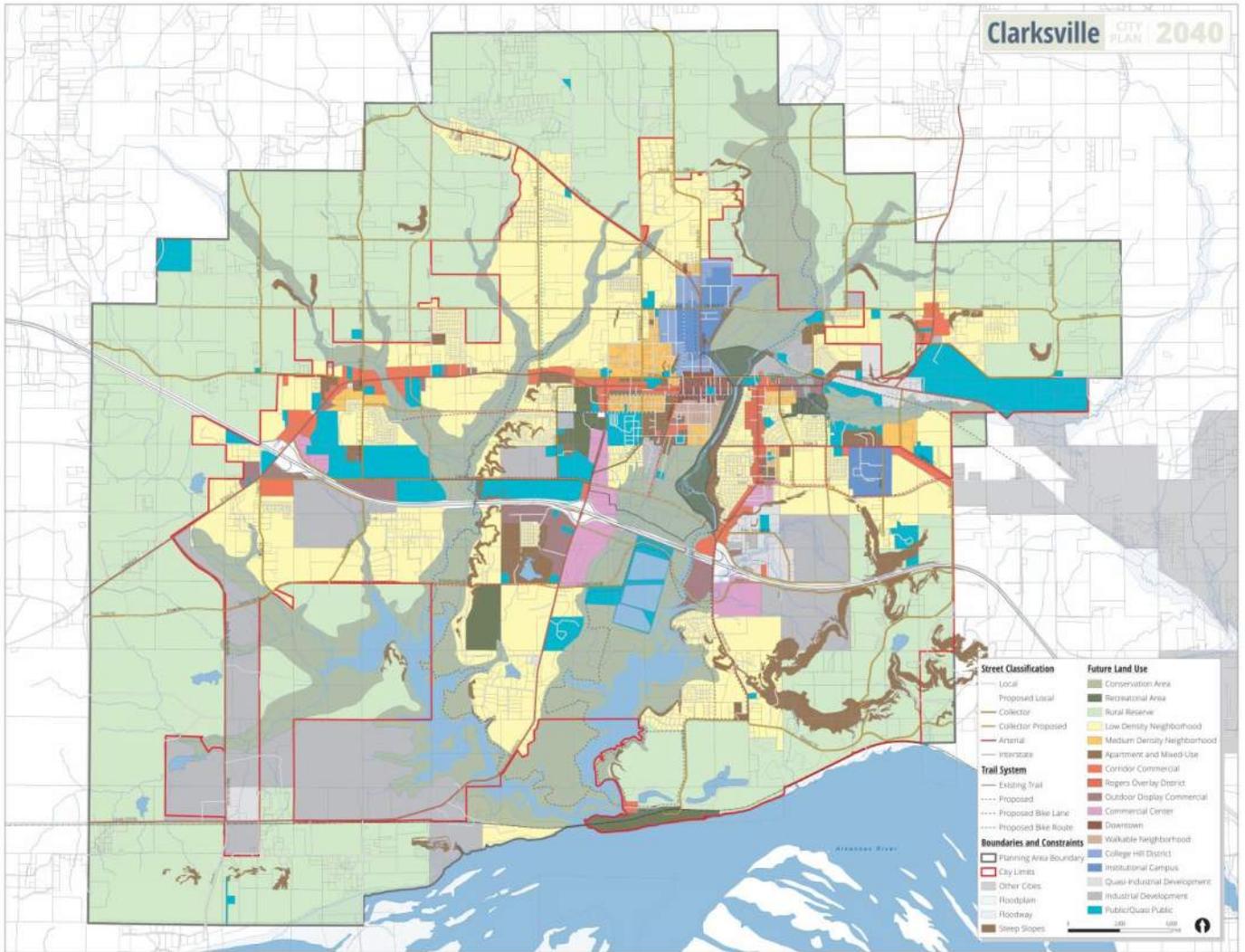
Density: N/A

Utility Requirements: Sewer and water service

Related Zoning: Any zone



Place Type Plan Map



4.2: Downtown Strategy

Clarksville is fortunate to have a relatively intact downtown compared to many communities. Although somewhat small in scale, there is a cohesive collection of historic buildings. For the most part, these structures are uninterrupted by vacant/parking lots fronting key streets and inconsistent infill development, a challenge faced by many downtowns. The suburban style development on the south side of West Main, between Ladd Street and South College Avenue, is one glaring exception to this pattern. As expressed by many stakeholders engaged in this citywide comprehensive plan for Clarksville, downtown is the “face” of the community and the “front door” for the University of the Ozarks campus. It is critical that Clarksville’s downtown is physically and economically revitalized over the coming years.

Downtowns are multi-faceted and complex. In many respects, they are fragile like a natural ecosystem and each aspect of the downtown is intertwined with the others. Consequently, it is important that downtowns be addressed in a holistic manner. Because of the tremendous success that the National Main Street Center of the National Trust for Historic Preservation has experienced with downtown revitalization over several decades, this section of the plan has been organized into four sub-sections based upon the Main Street “Four Point” Approach:

- Organization
- Design
- Economic Vitality
- Promotion

Organization

Because most struggling downtowns cannot rely on market forces along to catalyze their revitalization, an organizational infrastructure must exist to make it happen. Fortunately, Clarksville is a member of the Arkansas Downtown Network (ADN). ADN is a program that offers resources and education to communities that are not able to commit to the level of certified Main Street towns, but that strive to revitalize their built environment and build the capacity to become a certified Main Street community. Clarksville is one of sixteen ADN communities in the state. At present, Clarksville’s downtown program – the Downtown Committee - is operated by a part-time employee with the Chamber of Commerce. Among the program’s many current activities are managing the Johnson County Farmers Market held seasonally at the Courthouse Square on Saturdays (8:00 AM to noon) and Wednesdays (5:00 to 8:00 PM), as well as the Music on the Square events held during the warmer months on Fridays from 6:30 to 9:00 PM.

Key Recommendation 4.2.1: Upgrade from an ADN program to a Certified Main Street program.

The plan’s public engagement process has shown strong consensus that, as with many communities, Clarksville’s overall image is strongly tied to its downtown. For the community to progress as a whole, Downtown Clarksville must lead the way. This objective is undoubtedly ambitious, and will require concerted and coordinated effort with an access to available state resources.

Upgrading Clarksville’s ADN program to a Certified Main Street program will be a considerable and important step toward that aim, giving access to additional grant funding and technical resources. And, ultimately, dedicated full-time staff focused on the promotion of downtown. This may seem like a solution out of the reach of a smaller community such as Clarksville. However, there are currently nineteen certified Main Street communities throughout Arkansas, including the following: Dumas (4,706); Eureka Springs (2,073); Osceola (7,757); Ozark (3,684). Furthermore, there are a few others that are only slightly larger than Clarksville, including Batesville (10,248), Blytheville (15,620), Helena-West Helena (12,282), and Siloam Springs (15,039).

Key Recommendation 4.2.2: Structure the new Main Street organization to include staffing, a board of directors and committees.

Since the current ADN program – the Downtown Committee - is housed within the Chamber of Commerce, it should likely continue to function as an arm of the Chamber both to avoid the overhead costs of a separate office and to benefit directly from the resources of the Chamber. The only exception to this recommendation would be if some political or perception issues exist that would make a more independent Main Street program preferable. Like most Main Street programs, Clarksville’s might be structured as follows:

❖ *Staff*

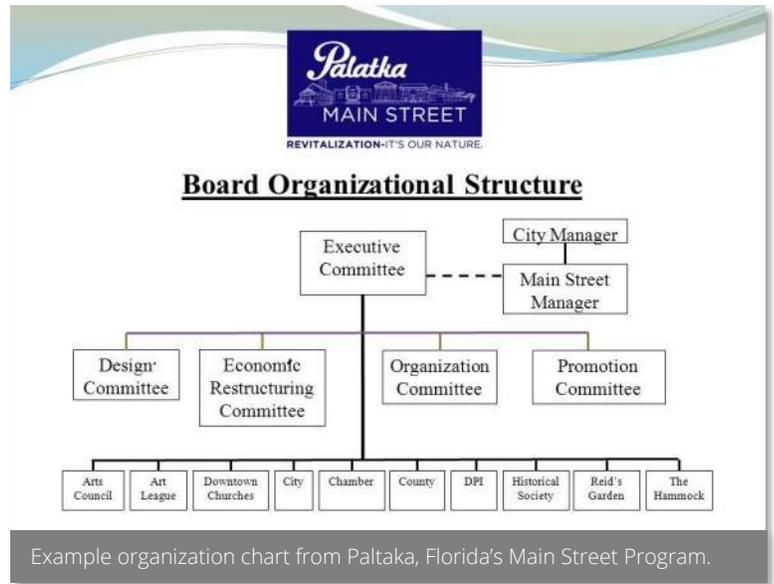
At a minimum, the current ADN Director should become a full-time Main Street Manager. Ideally, the Director might have some administrative support, as well as interns from *U of O*.

❖ *Board of Directors*

Board members should consist of diverse stakeholders, including property owners, business owners/operators, public officials, and representatives from key institutions (U of O, etc.). Board members should be respected within the community and should be willing to spearhead fundraising efforts (“making the ask”), which should not be a primary responsibility of staff.

❖ *Committees*

Main Street program committees are typically structured around Main Street’s “Four Points” – organization, design, economic vitality, and promotion. Committee members should have some of the same characteristics as Board members, but they should have skills and experience relevant to their respective committees and they should be willing to “roll up their sleeves” to do work as needed.



Key Recommendation 4.2.3: Provide a stable source of funding for the Main Street program.

Surveys of hundreds of Main Street programs across the country have revealed that it is critical that a Main Street program have a stable source of funding. The majority of funding for most programs comes from the local city government, while the county government often contributes when the downtown is also the county seat. Economic development entities are another key funder, including chambers of commerce. While revenue sources such as memberships and special events can be important compliments to the more stable sources, they alone are most often insufficient. It is critical that the Main Street manager does not spend a significant amount of their time raising funds for their salary as opposed to doing proactive work for the downtown. Many unsuccessful Main Street programs fail to follow this idea. At present, the City provides the Chamber of Commerce \$175,000 annually toward the salaries of the Downtown Committee director and the Economic Development director, so the current model could simply be expanded a bit if the Downtown Committee director can become a full-time position.

Key Recommendation 4.2.4: Leverage one or more regional model downtown programs from which to learn.

Many downtowns have found success with revitalization early in their efforts by benefiting from mentoring relationships from other communities. Lessons can be learned from others who have mature revitalization programs. Russellville is one potential nearby model that Clarksville has already been using to at least some extent. While Downtown Russellville still has considerable room for improvement, they are a certified Main Street community, and have made great strides over the past five years. Other potential models include Conway, Rogers and Siloam Springs, all certified Main Street programs.

Design

There are numerous physical planning issues to be addressed for Downtown Clarksville, including the public realm, historic buildings, redevelopment opportunities, parking, truck traffic, and other design issues. Below are recommendations for such topics:

Key Recommendation 4.2.5: Enhance the public realm to be more functional and attractive.

Courthouse Square Area

The Courthouse Square is extremely important for three reasons: 1) It is an iconic landmark that helps give Downtown Clarksville a strong sense of place; 2) It generates traffic that is important to the economic vitality of nearby businesses; and 3) It serves as a venue for special events. It is for that third reason, in particular, that recommendations for improvements are offered:

- ❖ *Redesign the corners of the square for expanded pedestrian/public space.* The corners are designed with a curved shape that functions, especially on the two south corners, as a passing lane. This configuration is unnecessary for traffic purposes and results in less lawn and pedestrian space. A redesign would make the street crossing distance much shorter and safer for pedestrians. It might also result in picking up more on-street parking spaces.



Although Conway has many advantages, including a population of roughly 65,000 and multiple universities, it could still serve as a good model for Downtown Clarksville, due to its City/Chamber cooperation.



The curved turning lanes at the southeast and southwest corners of the square are unnecessary for traffic purposes and could be replaced by expanded lawn and public space.

- ❖ Consider relocating the military veteran's monument out of the gazebo to a more high-profile location in the Square. Historic photos of Downtown Clarksville reveal that there were once multiple gazebo structures like the one located at the northeast corner of the square. However, because the sole existing gazebo is occupied by a monument, it is not very user friendly. Relocating the monument to a higher profile location elsewhere in the square would free up the gazebo's space to be used, including the provision of historically-based seating (Savannah benches). This recommendation should only be pursued if there is no political sensitivity associated with relocating the monument.



The military veterans monument could be relocated to a more high-profile location and allow greater use of the gazebo.

Streetscapes

The existing streetscapes of Downtown Clarksville are typical of many downtowns. They feature poured concrete sidewalks in relatively good condition, occasional street trees, and a two-tiered street lighting system. That system includes tall cobra-head street lights oriented toward drivers and human-scaled Victorian-style street lights oriented toward pedestrians. Recommendations for streetscapes include the following:



- ❖ Add pedestrian bulbs ("bulb-outs") and paved crosswalks to key downtown intersections. Bulb-outs are curbed extensions of a sidewalk roughly 6 to 8 feet into the street intersection that serve multiple purposes. They are connected at either side of the street with a paved crosswalk. This design intervention would achieve various benefits, including: 1) Decreasing the street crossing distance for pedestrians; 2) Providing opportunities for more pedestrian/public space and landscaping (including rain gardens, bioswales, etc.); and 3) Clearly defining where on-street parking is allowed.

It is recommended that the crosswalks consist of actual pavers and not paint striping or stamped asphalt. Paved crosswalks make drivers more aware of being in a pedestrian zone because they can hear and feel the pavers under their tires, and pavers do not suffer from the wear and tear to which other options are vulnerable. Also, because burying downtown's overhead utilities is estimated at roughly \$1 million, that idea is likely not viable until a complete streetscape rebuild occurs. Paint could be used as a temporary measure to test the feasibility of the ideas of pavers and bulb-outs to gauge community response before committing funding to the project.



- ❖ Update downtown lighting and place utilities underground. Downtown's lighting presents an incoherent theme that coupled with the overhead electric utilities create a less than desirable visual appearance. A new lighting system to replace the existing two-tier system would update the lighting's dated appearance and provide a place for banners, self-watered hanging baskets to be hung on the light poles using its track system. The work would additionally provide an opportunity to place the electric utilities underground. Placing utilities underground could have a dramatic impact on downtown's appearance, particularly along the College Avenue corridor (though not currently proposed).

- ❖ *Add additional seating in the form of historically-styled benches, such as Savannah benches.* As the downtown revitalizes, convenient seating will be more important. Additional seating should also be considered for the Courthouse Square area, although it should either be movable or strategically located to not interfere with needed space for special events.

Key Recommendation 4.2.6: Enhance historic buildings and pursue new infill development.

Historic Buildings

Historic buildings are critical to any downtown because they are a major part of the downtown “brand.” In light of the challenges that downtowns face, historic buildings provide one of the key competitive edges for downtowns versus other commercial and mixed-use areas. Downtown Clarksville has a rich stock of historic buildings, but many have been negatively altered over the years. Most alterations have been made to the storefront levels, and typical changes have included:

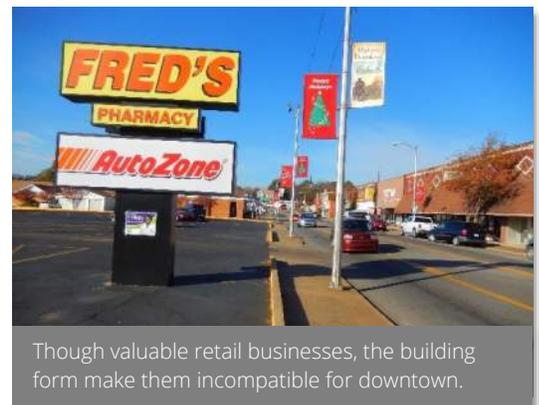
- ❖ *Filling in transom windows of storefront*
- ❖ *Altering the balance of the storefront in various ways*
- ❖ *Adding shingle-roofed canopies*

Fortunately, many of the negative alterations that have occurred can be reversed. To avoid future inappropriate building alterations, and to encourage the reversal of some of the past alterations, the following recommendations are offered:

- ❖ *Create a regulatory system to protect downtown historic structures and guide downtown construction.* Two options exist with respect to this recommendation. It is recommended that downtown stakeholders be engaged in a direct way to help determine which option will best serve Clarksville’s needs.
 - *Adopt a historic preservation ordinance, creating a historic preservation commission, and adopting guidelines and/or standards for modification of downtown structures.* This option provides the most protection for downtown and can do the most to ensure historic structures are protected, including the prevention of demolition. It would significantly bolster the existing National Register (NR) district. It also requires considerable political will and could face pushback from downtown stakeholders.
 - *Create zoning regulations that establish design standards for the downtown area.* This option would include amending the zoning code to provide extra protection within the downtown district. It could be established to require compatible modification (though not necessarily historically sensitive) of existing structures, regulate infill development, etc. This option would require less political will and can be tailored to provide more or less regulation, as needed. It could also be used as an intermediate step to explore the possibility of creating a local ordinance historic district (first option).



The façade on the right has been only modestly altered with its transom windows filled in (see above the awning), but the façade on the left has been substantially altered, including the incompatible shingled canopy.



Though valuable retail businesses, the building form make them incompatible for downtown.

New Infill Development

Unlike many downtowns, Downtown Clarksville is fortunate because there are not many vacant lots resulting from demolished buildings. Regardless, the following recommendations are provided for new infill:

- ❖ *Priority 1: Redevelop the “strip commercial” type site on the south side of W. Main between Ladd Street and S. College Avenue.* This large site creates a gap within the historic downtown, like a missing tooth in an otherwise beautiful smile. Not only are historic buildings missing here, but they have been replaced with a form of development that is completely counter to the character desired for a historic downtown and will impede downtown from reaching its full potential. New development should be built to the street, with parking in the center of the block and access via an alley.



- ❖ *Priority 2: Redevelop the Key Corner Site on the southwest corner of Cherry Street and College Avenue.* This site represents a key gateway from the College Hill neighborhood and University of the Ozarks into downtown. Proper development would help attract students and pedestrians from the area to the north and bridge the gap between the two areas.
- ❖ *Priority 3: Redevelop the one-story building and the adjacent vacant lot on the south side of W. Main between Cravens and S. Dunlap Streets.* The subject corner building is non-historic and adjacent to the northeast corner of the Courthouse. It sits back from both street frontages because of front parking lots. These structures are significant due to their location adjacent to the Courthouse square adjacent Main Street. The site should be redeveloped with compatible infill buildings.
- ❖ *Numerous other sites are indicated for infill development as shown on the graphic above.* These locations would provide ideal opportunities for infill development, enhancing downtown as it redevelops.

Key Recommendation 4.2.7: Prepare for future parking demands.

At present, a lack of available and convenient parking does not appear to be a significant problem for Downtown Clarksville. This fact is confirmed by both observations and interviews with downtown stakeholders. However, assuming there is increased success with future revitalization, parking demands will increase significantly. Even if not implemented in the near future, the City should be prepared to pursue the following parking strategies at some point:

- ❖ *Manage on-street parking to insure turnover, but without the use of parking meters.* On-street parking should always be reserved for the highest turnover rates for the convenience of customers. That means they should be limited to two or three hour durations per user. Longer term users (particularly downtown employees) should be parking in off-street lots. While parking meters are not necessary, time limits should be posted with signage and a City employee will need to monitor parking and issue tickets to violators. If the City is concerned with the negative publicity that might occur with parking enforcement, it might initially try to voluntarily implement a parking management program with the help of the Downtown Committee.
- ❖ *Retain all existing on-street parking and seek to create new spaces if and when opportunities arise.* As pointed out previously, there may be an opportunity to add spaces at the corners of the Courthouse Square if the Square is physically expanded slightly. Although it will require further study, there may be some streets currently lined with parallel parking that have sufficient curb-to-curb width to accommodate angled parking. Potential additionally exist to add on-street parking along Main Street with the elimination of the center-turn lane.
- ❖ *Establish partnerships with institutions for parking lot usage.* The City and Downtown Committee should approach targeted institutions in the downtown, primarily churches, to gauge their willingness to allow public parking during their non-peak hours. For example, church parking lots often sit empty for many days/hours when they are not needed by their congregations. If agreements can be reached, the days and hours of availability to the general public might be indicated through signage.
- ❖ *Enhance and provide wayfinding for parking lots.* Enhancements that many parking lots can benefit from are landscaping improvements, new paving, clearer demarcation of parking stalls, and better lighting for evening safety. Regardless of such potential improvements to most lots, the greatest need is more signage to direct people to parking lots.



Downtown Clarksville has adequate parking, but parking management, wayfinding signage and shared parking agreements could allow better utilization of parking resources and increase convenience for customers and visitors.

Key Recommendation 4.2.8: Reroute through truck traffic around downtown.

There is currently substantial through traffic from trucks that downtown stakeholders find annoying. Much is on U.S. Highway 64 and Highway 103 through the *U of O* campus. While outdoor dining is a cherished feature of many vibrant downtowns, the nuisance impacts of truck traffic might preclude outdoor dining on W. Main Street. Rerouting truck traffic typically poses a challenge since the alternative routes often simply impose the impacts on a different group of stakeholders. A recommended first step is to work with large local industries to find alternative routes to minimize impacts on downtown.



Downtown's truck traffic is a frequent source of complaints by downtown users and businesses.

Key Recommendation 4.2.9: Create a park on the east side of Spadra Creek on either side of Cherry Street.

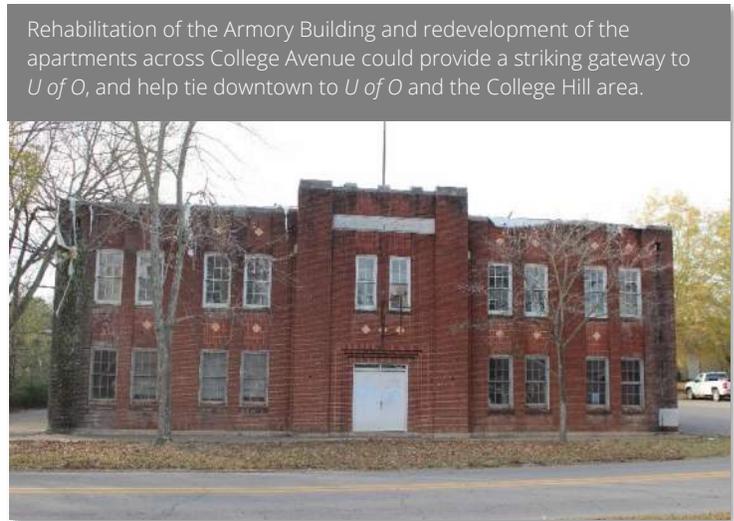
There is already a nature trail along the west side of the creek that traverses this area. Although it is within floodplains, the useable, flat and open land is located on the east side of the creek. Any physical improvements, such as parking, seating and paved pedestrian areas, would need to be designed with flooding in mind, but a park with active programming could add a positive new dimension to downtown. This recommendation is further detailed in the Recreation and Conservation Plan.



Key Recommendation 4.2.10: Support potential University of the Ozarks projects for downtown and College Hill.

Clarksville is extremely fortunate to have *U of O* for many reasons. In particular, it can be an important partner in the revitalization of downtown and *U of O* officials have expressed their support for downtown. Below are a few potential physical planning projects for *U of O* within the downtown:

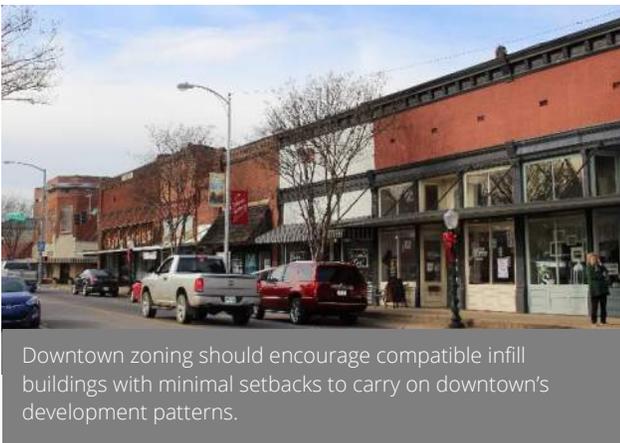
- ❖ *Rehabilitate the Armory Building as an adaptive reuse project.* The City sold this vacant building to *U of O*. It is structurally sound, but needs a new roof and all new systems (HVAC, electrical, plumbing, etc.). A recent architectural evaluation estimates costs at \$100-\$150 per foot. One potential use might be a center for outdoor recreation, as it is adjacent to a greenway trailhead, there are many students who are engaged in outdoor recreation, a rock climbing wall could be installed, and the building could be used to store kayaks and similar items. The project might also benefit financially from state and federal investment tax credits for historic rehabilitation.



Rehabilitation of the Armory Building and redevelopment of the apartments across College Avenue could provide a striking gateway to *U of O*, and help tie downtown to *U of O* and the College Hill area.

- ❖ *Redevelop the site across the street from the Armory Building for a mixed-use building.* The rehabilitated Armory Building could serve as a wonderful front door for the university, but the property across the street (east side of N. College Avenue) is substantially underdeveloped. It features a series of one-story housing units fronting a gravel parking lot. A much better use of the property would be a three-story building with ground floor commercial uses (coffee house, etc.) and upper floor student housing. It would also greatly enhance the first and last impression for visitors of *U of O*.
- ❖ *Adapt one or more downtown buildings for university-related housing and other uses.* This is a concept that the university has reportedly already begun to explore. This strategy achieves two important goals: the provision of needed student housing and downtown revitalization. Based upon complaints of few housing options for faculty, it might address that issue too. Depending on the project details, *U of O* might also benefit from investment tax credits for historic rehabilitation. This idea is also detailed in Key Recommendation 4.2.6.

Key Recommendation 4.2.11: Reconsider the maximum building heights permitted and setbacks in the C-1 zone.



Downtown zoning should encourage compatible infill buildings with minimal setbacks to carry on downtown's development patterns.

Downtown is zoned C-1 (Central Business District). While most of the bulk standards (urban design related) are reasonable, the maximum building height of 55 feet or 5 stories is excessive in light of historic development patterns. With the exception of the three-story First Presbyterian Church on the corner of Cherry and College, all other buildings in the downtown are one and two stories in height.

Additionally, requiring a maximum setback is recommended. The relationship between the sidewalk, street, and building is critically important in downtown. Structures which are setback from the street irrevocably destroy the unique character of downtown and discourage pedestrian activity.

Economic Vitality

The economic vitality component of downtown revitalization is typically focused on making physical development and building revitalization occur, as well as the creation of new businesses and housing. Key approaches are: 1) determining what uses are viable within the local market; and 2) how to attract them. Recommendations for this topic include the following:

Key Recommendation 4.2.11: Make zoning adjustments to allow for an economically strong downtown.

Downtown is zoned as C-1 (Central Business District). In accordance with the zoning ordinance, “This district is intended for Clarksville’s downtown area. It is designed to allow for a mix of uses that create a vibrant downtown.” While the district’s overall intent is consistent with “best practices” for downtown revitalization, there are still specific adjustments recommended, as follows:

- ❖ *The following uses should be permitted “as-of-right” rather than being a special use or prohibited if local historic district designation occurs to regulate the form and character of new infill development: convenience stores (without gas pumps), hotels, live/work units, multi-family residential, and school/nursery/day care.*
- ❖ *Uses that should be prohibited altogether include: mini-storage, single-family detached dwellings, warehousing, and wholesale establishments.*



Downtown can build upon a small core of existing restaurants, such as this barbeque restaurant.

Key Recommendation 4.2.12: Address the drawback of downtown lying within a floodplain.

Studies have been conducted in the past to address the fact that the downtown is within a floodplain. One study cited was conducted roughly a decade ago and it estimated the costs at the time for rebuilding the existing levee system at approximately \$1.5 million. Because the flood insurance costs for property owners result in a financial disincentive to investing in the downtown, it is a critical barrier to downtown revitalization. The following recommendations are provided:

- ❖ *Revisit the previous floodplain study.* As noted above, a study was prepared some years ago to address this issue. That study should be revisited and perhaps updated to determine the next steps. If improvements to the existing levee system are warranted, see below.
- ❖ *Pursue levee improvements that will remove downtown from the floodplain.* If determined necessary that physical enhancements to the existing levee system are needed, they should be implemented. Opportunities for state and/or federal funding for such a project should be explored.

Key Recommendation 4.2.13: Pursue financial tools for downtown revitalization.

Many communities adopt financial incentives to attract particular types of uses for specific areas. Until market analysis can occur to better understand the dynamics for Clarksville, it is difficult to determine at this point the types of uses that should be incentivized and in what manner (if at all). While many communities utilize tax increment financing (TIF) as a key financial tool, TIF has very limited value in Arkansas because of the tax structure, including relatively low property tax revenues. Even though it may be politically challenging to justify new incentives that cost

local governments money or lost tax revenue, the existing federal and state incentives for the rehabilitation of historic buildings should continue to be promoted. Another option may be to work with local banks that must meet their CRA (Community Redevelopment Act) credits, as local economic development officials agreed that CRA requirements may yield results.

Promotion

One reason that many downtown strategies save the promotion section to the end is because, in light of the Main Street “four point” approach, it is typically the “point” sequenced for emphasis toward the end of strategy implementation. The rationale for this sequencing is that a downtown has only one opportunity to make a first impression. If a new visitor to the downtown is underwhelmed, they may never return, in addition to them spreading the word. Thus, it makes sense to do some “product improvement” prior to aggressively promoting a downtown. Below are recommendations for promoting Downtown Clarksville:

Key Recommendation 4.2.14: Conduct a Centralized Retail Management (CRM) strategy for downtown's businesses.

This is the same type of strategy that suburban shopping malls use with their tenants. However, unlike shopping mall tenants who sign a lease with a single landlord, it is much more challenging to coordinate many independent tenants with different landlords. With that challenge in mind, the expanded downtown organization should work with downtown businesses to achieve the following:

- ❖ *Agree on consistent days and hours of operation.* If possible, businesses should be encouraged to stay open on weekends. While it may be difficult to convince many businesses to remain open into the evening hours, the downtown might start by selecting one particular night each week or month to stay open. That evening might be tied to a regular special event. It may take as long as six months of consistent expanded days and/or hours for the market to catch on and for benefits to be realized.
- ❖ *Adopt a logo for downtown.* Hire a graphic artist to create a logo that is simple, attractive and memorable. It should be utilized in a number of ways, including advertising, on shopping bags of individual businesses, on street light banners, and in similar manners.
- ❖ *Coordinate joint advertising for local media.* Advertisements can promote the downtown in general and utilize the suggested new logo (above), while also identifying the individual businesses that would help fund the advertisement.

Key Recommendation 4.2.15: Make the downtown Clarksville's premier special event venue.

- ❖ *Continue to hold special events in the downtown if they have traditionally been held here.* Also, some existing events should be expanded. For example, the farmers market should operate later than noon to attract more customers, as indicated by university students who were interviewed. Also, music events would likely draw students and others.
- ❖ *Identify any local events currently held outside of the downtown that might be moved to the downtown.*



The Peach Festival is one of several held in downtown currently.

- ❖ *Explore the initiation of new events in the downtown. Examples of potential new events, which can be somewhat small and regularly-scheduled, include a monthly musical event or theatrical performances.*

Key Recommendation 4.2.16: Utilize telecommunications effectively to market Downtown Clarksville.

The recommended expanded downtown organization should leverage a variety of telecommunications vehicles to promote Downtown Clarksville, including a website and various forms of social media (facebook, twitter, linked-in, etc.). Google Analytics should be used to track effectiveness, and the organization should purchase the use of its chosen website address.

Key Recommendation 4.2.17: Encourage downtown businesses to cater to University of the Ozarks students.

Students are easy to target for promotional efforts, as student IDs can be used for providing student discounts. Advertising can also be targeted to student publications, events and social media. Although it must be recognized that students have very limited disposable income, their presence at local businesses still provides an energy and vitality that can draw additional customers who do have more spending power.

Other Strategies

Some strategies for downtown revitalization do not fall clearly into the Main Street “four points” of organization, design, economic vitality or promotion. Below is one such strategy:

Key Recommendation 4.2.18: Increase code enforcement efforts for the downtown and residential areas surrounding the downtown.

There are two reasons for this recommendation. First, there seem to be some property maintenance issues that negatively impact the appearance of the downtown area, particularly the adjacent residential areas. Thus, code enforcement may rectify those issues. Secondly, some downtown properties are either vacant or underutilized, yet owners are unwilling to do anything with their properties, such as investing in them or selling them at reasonable prices. To the extent that there may be maintenance violations occurring for some of them, enhanced code enforcement might encourage the owners to either invest in improvements or sell their properties.

4.3: Downtown Economic Development Strategy

Marketing Drivers and Concepts

This section provides several recommendations for branding and marketing of Clarksville with a focus on the role of downtown. The key competitive advantages of Clarksville will include access to Ozark recreation assets and mountain lifestyle amenities, the “college town” feel (especially downtown), and both transportation and high-speed Internet accessibility. These marketing drivers are explained in greater depth below.

Mountain “Outdoors” Recreation and Lifestyle

As noted in the Market Analysis, Clarksville is well-situated at the center of the Ozark region including Lake Dardanelle, the Ozark National Forest, Mt. Magazine State Park, and Ouachita National Forest. As such, Clarksville is located near a great mountain range, beautiful lake, and federally-recognized national forest system that provide it with access to immense natural beauty and recreational amenities.

Despite the presence of a stunning natural backdrop for the city, few of Clarksville’s residential or commercial neighborhoods are situated where they can take full advantage of views or direct access to these amenities. Nevertheless, the city (and downtown in particular) can act as a “gateway” to these wonderful natural areas. The University of the Ozarks and its “Ozarks Outdoors” program can generate strong synergies with a marketing effort focused on establishing downtown Clarksville as the gateway to this incredible outdoor resource area.

Target Business/Venue Mix

The “destination” downtown retail business mix, recommended based on the findings of the market analysis, provides for the addition of about 82,000 square feet of retail uses. Several of the target businesses are specifically oriented to strengthening the city’s marketing power as a gateway to the Ozarks. Among these are businesses oriented to hand-made jewelry and accessories, antiques and home furnishings, musical instruments, gifts and novelty stores, destination hobby/toy and game businesses, destination restaurants, coffee/tea shops, and others. Of particular importance are three “anchor” uses recommended to help secure the Ozark Gateway brand:

- ❖ *Sporting Goods Destination Store* (with a large selection of outdoor (i.e., camping, biking, hiking, hunting and fishing) equipment. Such a retail venue could be coordinated with the university’s own rental programs – for canoes, kayaks, bicycles, and outdoor equipment - to strengthen synergies for outdoor recreation equipment marketing. Such programs could be integrated with a retail component that benefits the university.
- ❖ *Recreation/Entertainment Venue* (18,000 square feet) that focuses on the recreation amenities nearby. Such a facility would provide a unique indoor “experience” centered downtown that would capture recreation enthusiasts traveling throughout the region. Such a venue might include “extreme” sports activities (climbing training walls, indoor tracks, etc), educational exhibitions and training facilities, as well as meeting and event facilities, for example.
- ❖ *Health and Spa Services* (10,000 square feet), which would provide high-quality spa services perhaps associated with a boutique lodging facility. While the markets for spas and lodging have not been tested, the overall concept would prove consistent with an effort to establish or create a destination market.

The retail and venue anchors help to establish downtown Clarksville as a destination within the region for attracting Ozark-oriented tourists and recreation enthusiasts.

Outdoor Recreation Trails and Events

It is also important to establish stronger linkages between downtown Clarksville and the tremendous recreation amenities that surround the community. Extending hiking/biking and pedestrian trail systems into and through downtown Clarksville will be important to establish the city as a “node” on these trails. By doing so, the city becomes not only a part of the regional recreation tourism corridor but also provides Clarksville with further amenity value for attracting new residents and businesses. A strong regional recreational trail system that can be marketed as part of the city's overall promotional package for both business and tourism will be helpful. Having downtown featured as a node on those trails can only help strengthen downtown as a destination attraction.

It is also recommended that Clarksville become more of a host city for outdoor recreation events including bicycling, fishing and hunting tournaments, marathons, and other major recreation events. Not only do such events potentially raise the city's profile and provide a temporary economic boost, they also become part of the city's overall marketing package. When hosting such events becomes too large of a challenge for local resources to bear, the city can certainly partner with the University of the Ozarks and with surrounding communities like Russellville and Ozark to ensure sufficient capacity, resources, and support.

Local Park / Tourism Offices

It is recommended that downtown tourism offices include representation from the area's parks and forests, such as through visiting exhibitions, displays, lectures, films, staff sharing, and other approaches to enhance the city's linkages with surrounding federal and state park and forest resources. By integrating more regional recreation assets, there is the opportunity to leverage more funding and (limited) staff support for local tourism development efforts that support those assets.

Conferences and Academic Partnerships

The city should endeavor to attract meetings and conferences, with a focus on recreation amenities, conservation of the natural environment, sustainable agriculture, and other areas of interest for which the city and the region have a particular competitive advantage. Such meetings or conferences, or special adult training courses, could be sponsored in collaboration with University of the Ozarks. The university already has an outdoors program (“Ozarks Outdoors”) and a focus in environmental studies and sustainable agriculture, so sponsoring special events could help strengthen the university's reputation in these areas and increase Clarksville's overall exposure as a center for related activity. The anchor recreation venue noted above could provide space for meetings, events, and special training.

College Town

Communities that become established as “college towns” are often listed among the most competitive for attracting entrepreneurial activities and emerging businesses, tourism, and retirement. Thanks to the presence of the University of the Ozarks, Clarksville has a somewhat unique opportunity to cross-brand itself with both the regional natural amenities and the local college. While the university has not expressed an intention of moving major academic functions or housing into the downtown area, its location is within walking distance of downtown and there are opportunities to merge the campus and downtown through housing, programming, and branded retail, entertainment, and cultural activities.

Ultimately, the marketing of the university and its competitiveness for attracting high-quality students, staff and faculty is closely associated with the marketing of downtown Clarksville as an attractive, lively place to visit, invest, and live. The marketing of Clarksville as a Gateway to the Ozarks intersects nicely with the university's Ozarks Outdoors program, to form strong synergies in support of the overall brand.

University-Sponsored Academic Program

While the university has not made any commitments to relocate academic programs into downtown buildings, there is the opportunity for integrating some special programming with downtown venues or operations if there is a suitable return to the university. For example, a special training course associated with an anchor recreation venue could generate some revenue benefits to the university and increase its overall exposure. Ultimately, it would be in the city's interest and in the interest of downtown revitalization to attract some interactive university programming into the downtown area. Again, it is also in the university's interest to help leverage downtown as part of its overall amenity package and for the purposes of recruiting the best students, staff and faculty. Downtown vitality cannot be divorced from the university, since that would not serve the university's best interests in the long term.

University-Sponsored Events and Activities

Certainly, there is the opportunity for university-sponsored events and programs held downtown such as annual music festivals, arts and cultural exhibitions, performances, and events that showcase the university's environmental and outdoor programs to a broader audience. The small farmer's market in downtown Clarksville should be used to help showcase the university's sustainable agriculture program. In what ways is the university working with area farmers on sustainable agricultural production? Is there an opportunity to showcase these efforts or the university's program through a farmer's market that features sustainable agricultural practices? Perhaps there is the opportunity to promote the market to a regional audience if there are educational components added and showcased.

University-Related Housing

As noted in the housing market analysis, growth and turnover in faculty and staff at the university is expected to generate a share of the demand over the next five years for up to 60 job-induced market-rate rental units in the city. While the university has no intention of building or rehabilitating buildings for student housing in the downtown area, there is the opportunity for sponsorship programs that help create housing resources downtown for young faculty and staff. In some places, universities and other employers will guarantee a certain number of rental units, for example, to house staff, faculty, or upper classmen to help support new or rehabilitated housing in a downtown. So, for example, the university could collaborate with a downtown building owner or private investor to guarantee even a small number of units that will help leverage financing for the private investor. In this way, the university carries little direct financial risk yet can help an investor significantly in accessing financing for rehabilitation or new development.

Expanding University Footprint South

While the university has not expressed an interest in direct investment in downtown housing, there is the opportunity to integrate the campus better with downtown through investment in housing and buildings located between the university and the downtown core. Whatever activities – housing, university offices, clubs and associated uses – that can be integrated into the two blocks between the university and downtown, can help bridge this gap. In some cases, bridging this gap may not require direct university investment, but an effort to encourage associated activities to locate within the area closer to downtown.

Marry UO's Sustainable Agriculture with Tech's Culinary Program

Efforts are encouraged to explore collaborations that would bring institutional activities into downtown Clarksville. Such collaborations might include the development of new joint programming between University of the Ozarks and Arkansas Tech, for example, marrying UO's sustainable agriculture program with Tech's culinary arts program to create a new "farm-to-table" specialization that could also have a retail component (e.g., a restaurant or shop showcasing local/regional agricultural product). In lieu of any interest from UO, there is also the opportunity of exploring a collaboration between the City and Tech on bringing a new program to downtown Clarksville, but obviously such efforts should not focus on anything that might be perceived to be competing with University of the Ozarks.

High-Speed Broadband Hub

Small, relatively isolated communities across America are embracing the Internet as a way to overcome geographic boundaries and the lack of access to large metropolitan markets. Clarksville is positioned better than many towns, thanks to its direct highway access to Interstate 40. But, marketing the city as having high-speed Internet access and free downtown-area web services can help with attracting, retaining, and recruiting small entrepreneurs and web-based businesses that otherwise would not seek a location in Clarksville. Given the influence of web services ranging from small designers to Amazon.com and 3-D manufacturing services, it is essential that Clarksville ensure that it can compete for companies that increasingly rely on the Internet not only for sales and distribution but eventually, for production. Many of the companies that would be attracted because of high-speed services would locate in the downtown area, so they are part of the target market for downtown.

Infrastructure is Key

High-speed Internet service and associated infrastructure is critical to ensuring that a small town like Clarksville can compete not only for web-based businesses but also for modern manufacturers who rely on such service for sales and marketing, distribution and administration. Cities like Chattanooga and Clarksville, Tennessee promote their high-speed service as an important economic development tool. Promoting itself as a "Gigabit City," Chattanooga has turned around its fortunes from being a dying "dirty" manufacturing city to a thriving tech hub. The focus of much of that city's efforts has been on revitalization of its downtown and development of a City utility-owned high-speed broadband service. Chattanooga is much larger than Clarksville, but it provides a model for how broadband service can be used as an economic development tool that correlates with downtown revitalization. Smaller towns that have successfully embraced high-speed internet service for marketing include:

- *Preston, Washington*
- *University Park, Iowa*
- *French Settlement, Louisiana*
- *Nakina, North Carolina*
- *Flora, Mississippi*
- *Molalla, Oregon*
- *Monticello, Minnesota*
- *Mitchell, South Dakota*
- *Canby, Oregon*
- *Tullahoma, Tennessee*

Utility Partnership

Establishing a strong partnership with the local utility – e.g., Clarksville Light and Water – is key to developing the infrastructure to market the community as a hub for high-speed internet services. Such a partnership could be developed between the CL&W, the University of the Ozarks, and local businesses to maximize coverage and resources. Offering not only high-speed service but also free web access in the downtown area specifically could provide a strong marketing advantage. It is in the interests of the public utility to encourage economic development, since the addition of new commercial users helps generate demand for service and increase net revenue stream.

Rehabilitation and Development

Downtown Clarksville has a number of vacant and under-utilized buildings, resulting from the stagnation of business and economic growth in the area. About 25,000 square feet of downtown's first-floor building space is vacant, accounting for nearly 10% of active retail/commercial use. This number does not include vacant upper-floor spaces. Where buildings are occupied, the space is often functionally obsolete or non-competitive for modern retail/commercial use. Much of the non-commercial use (in nearly 50% of all ground-floor space) is in under-performing activities or office and medical uses that should not be housed in ground-floor downtown commercial spaces.

The following section provides recommendations for approaches to rehabilitation, development, and regeneration of the downtown and its building stock through a variety of mechanisms. Underlying all of these strategies is an understanding of the market potentials and opportunities that would serve as the drivers for redevelopment and reuse. As noted in the market analyses, a "destination" marketing strategy must be employed in order to *leverage* potential demand for businesses and residential uses in the downtown area.

Building Rehabilitation and Reuse

To encourage rehabilitation and reuse of vacant or underutilized downtown buildings, a series of "Carrot and Stick" approaches is recommended. There is naturally some political sensitivity to enforcement of building codes and regulations in a small town environment. The best approaches to achieve public objectives in this case involve the establishment of strong and well-publicized incentives (e.g., "carrots") but with caveats associated with enforcement of existing regulations ("sticks"). It is also understood that some property owners lack the financial resources or will to invest in properties where there appears to be no viable use or profitable returns. Public intervention in this case is warranted and recommended to help property owners with a "leg up" and to reduce the risk for private property reinvestment.

Municipal Facilitation

A key element of any approach to downtown revitalization in this situation is *facilitation*. Facilitation means that public officials work with property owners and businesses; assisting in ways that do not necessarily require direct public financing, such as by reducing "red tape," assisting with business recruitment, and generally making it "easier" for property owners to reinvest in downtown. Such facilitation is often the prerequisite for revitalization. To achieve this aim, it is helpful to have skilled leadership and to have an organization in place to help with follow through (as recommended by other consulting team members). Key steps in this process include the following:

- ❖ *Communicate to all downtown-area property owners and investors the City's overall interest and commitment to downtown revitalization and specifically, to rehabilitation and reuse of existing building stock.*
- ❖ *Identify the property owners with target interests in the downtown area, especially those holding properties that are blighted or otherwise in need of rehabilitation, restoration, demolition or redevelopment.*
- ❖ *Meet with those property owners and investors identified above to learn what issues or concerns they may have, what efforts they have made to reinvest in their properties and what challenges they face in doing so. If they have no interest at all, then nevertheless continue to communicate with them about the development of programs and efforts to revitalize downtown. Eventually, they will hear the "constant drumbeat" of revitalization efforts.*
- ❖ *Develop a set of programs (several suggested below) that are targeted to the specific needs of property owners and investors, in coordination with the local banks and financial institutions, the university, real estate industry,*

chamber and business leadership. Input could be collected from these stakeholders through a series of "roundtable" leadership discussions on downtown revitalization.

- ❖ *Advertise programs and communicate their specifics to downtown-area property owners and investors to ensure they are aware of progress even if they are not participating directly.*
- ❖ *Implement programs through City agencies in collaboration with a downtown organization as recommended by other consulting team members.*

Historic Tax Credits Application Program

Historic buildings are part of the unique, competitive advantages of downtown, since such resources are not available anywhere else in the city and they help establish an attractive, "charming," and walk-able environment for residents and businesses. Certainly one program that already exists which provides an important incentive to downtown investors is the federal Historic Rehabilitation Tax Credit program. This program has been used effectively nationwide to assist property owners with rehabilitating historic buildings (over 50 years old) that qualify for the credits. The program provides 20% income tax credits for property owners and developers of qualified historic buildings, thus putting cash in the hands of property owners in a way that enables them to secure financing or otherwise make the project feasible in the market.

The constraint is usually the lack of information or ability to apply for the credits, which requires some understanding of the application process. In this respect, the City could help by coordinating with the Johnson County Community Foundation and/or the Western Arkansas Planning and Development District (WAPPD) to provide a grant application assistance program. Both the Foundation and the WAPPD are experienced in grant writing, so leveraging this experience can be marketed as a program to benefit local property owners and investors who might not otherwise take advantage of federal application processes.

Downtown Façade Grant Program

The City could also establish a direct grant program for assisting building owners with exterior renovations that can help reduce the overall cost of building rehabilitation. Such programs tend to work better than loan programs at present, due to the low interest rate climate of recent years. If interest rates increase substantially, then a loan pool in coordination with local banks may be a more effective tool. One of the typical constraints to façade grant programs is that the individual amounts (sometimes \$5,000) are limited because the municipality is trying to spread the overall grant pool out to a diversity of projects. The individual amounts can be just too small to make much of a difference on any one individual project, so it is recommended that consideration be given to realistic amounts necessary to genuinely leverage projects and then limit the number of grants given per year within the budget limits set by local government.

Another issue is that sometimes political support for downtown grants wavers due to political concerns that other neighborhoods are not receiving a fair share of budget resources. The importance of downtown as an economic driver for the whole city must be communicated up-front to avoid the competitive disaggregation of funding throughout the city.

Downtown PILOT Tax Relief Program

Arkansas state law allows for the implementation of PILOT (payment in-lieu of taxes) programs under certain conditions. PILOTS have been shown to be effective tools for leveraging redevelopment where state statute does not allow for direct tax abatement. It is recommended that a PILOT program be established for the downtown area where, as stated by Arkansas Economic Development Commission (EDC):

Real and personal property financed by revenue bonds and general obligation bonds may be exempt from property taxes during the lease-amortized period in which a local government retains title to a property. Payments by businesses (or property owner) to local governments in lieu of property taxes are generally encouraged and negotiated between the locality and the company (or property owner)...The negotiated PILOT shall not be less than 35% of the property taxes that would have been paid if the property were on the tax rolls, unless a lesser amount is approved by the (EDC) and the Chief Fiscal Officer of the State of Arkansas.

The program would be used as part of a “packaging” of incentives along with facilitation services, the downtown grant program, historic tax credit application assistance, and a rehabilitation loan guarantee program (see below). This package would be communicated and advertised as part of the City’s and Johnson County’s overall marketing and economic development efforts.

Downtown Building Rehabilitation Loan Guarantee Program

The City of Clarksville could also establish a loan guarantee program to reduce the risk of reinvestment in downtown buildings. A loan guarantee would not require any up-front financial commitment by the City, but the City would have to ensure financial capacity to back-up the loans in the event of failure. While this may sound as if it increases the financial risk to local government, it nevertheless allows the City to gain control of properties in the event of a default, ultimately providing the City with control over the assets. Meanwhile the availability of the guarantees helps enhance the property owner’s opportunity for securing a reduced cost loan for rehabilitation. The guarantees are likely to help financial institutions reduce the underwriting requirements – e.g., points – and interest rate for rehab loans in the downtown area, making them more attractive to investors and increasing potential returns.

Any effort undertaken by the City to reduce risk to private investors can make a big difference in the ability to get buildings rehabilitated and modernized to code. Aside from loan guarantees, the City’s facilitation efforts can help investors by working with property owners to assemble properties, recruit businesses, or recruit housing developers. When packaged with the other fiscal and financial incentives, reinvestment begins to look more attractive because both the cost and the risk of rehabilitation are reduced.

Downtown Building Acquisition Program

The City might embark on a building acquisition program in tandem with the above-mentioned fiscal and financial incentives. The program would be oriented to a “last resort” effort to ensure direct control of historic and other properties that would otherwise see physical deterioration and demolition. Where property owners do not take advantage of the aforementioned programs and are subject to code enforcement and other regulatory “sticks,” the City can offer to acquire critical properties that could be targeted for reuse and rehabilitation. The City could also take control where tax liens are placed on properties. There are two or more potential uses for City-controlled properties as discussed below.

Civic Space and Public Use: Certainly there is a need for civic spaces and public uses in the downtown area. One potential use is for meetings, conferences, events, and active civic uses as part of a broader destination recreation/entertainment facility or in addition to that venue. Any activities that bring people downtown are encouraged, but certainly there is the need for destination-oriented uses and tourism attractions that can leverage a broader market base for downtown and the city.

Land Banking: The City could also “bank” strategic buildings and properties in the downtown area, but hopefully with a plan in place for marketing, rehabilitation and reuse of such facilities by private investors. The City can also use buildings under its control to encourage housing development in the downtown area, especially in support of the university or other local employers. It is not advisable that the City retain control over buildings for extended periods

of time because it reduces the tax base, reduces momentum, and reduces private interest in reinvestment. In general, land banking should be discouraged except, as noted above, as a “last resort” effort to save, conserve, and rehabilitate downtown building stock.

Code Enforcement

Investment programs and packages offered by the City would be used to ameliorate the threat of regulatory action. Thus, programs and facilitation should be offered first as a pro-active, positive and very public thrust of municipal engagement with private property owners. But such efforts should also hold the advertised caveat that, if property owners are unwilling or uninterested in taking advantage of such incentives but still refrain from maintaining their buildings then codes must be fully enforced. Where tax liens are placed against properties, the City has the right to control those properties. Both the power to enforce the codes and the power to control negligent properties should be made clear as part of marketing the positive incentives. Thus, a true “carrot and stick” approach will be most effective. The actual powers of enforcement for the code and other regulations should rest with municipal civil servants who are free and independent from political pressures.

Civic Space

Civic space can be used to activate a downtown area and act as a spur for revitalization. In general, any venues or activities that bring more people downtown are helpful in leveraging investment. As noted above, the City might institute a land banking program which might be used in part to realize the development of civic spaces such as indoor meeting/event venues as well as outdoor performance and event spaces that activate the downtown area.

Live performance is a proven activity for attracting people downtown, and there are opportunities to combine existing functions like the city's regular Farmer's Market with live music and performances, to strengthen both activities. If the university can be engaged in programming downtown venues or, for example, in collaborating on the market/sustainable agriculture program, then the potential audience and resources can increase substantially. Certainly live music performances and festivals in the downtown area should be programmed regularly, and an active downtown organization (as recommended by the consulting team) can help in organizing and sustaining such activity in collaboration with the City and the university. Having a large festival or event that puts the city on the proverbial “map” can also help in promoting downtown and increasing audience.

Anchor Development

The City can be most directly involved in development of anchor venues and facilities, such as a destination recreation/entertainment venue or civic / meeting venue that becomes a regional attraction or destination for tourists and travelers. Anchor uses help spur private investment in other uses like hotels, restaurants, and housing units that have spin-off impacts on downtown businesses. Key steps in the process of developing anchors might include the following:

- ❖ *Identify prospective anchor uses such as those recommended in this report (destination recreation and entertainment venue, civic / meeting and conference venue, outdoor performance venue) or others.*
- ❖ *Examine the market potentials, community need, and prospective economic impact of these uses to determine the best way to maximize downtown spin-off and revitalization.*

- ❖ *Conduct a feasibility study of the particular anchor venue, and work with downtown property owners, businesses, and residents to determine the best site as part of the feasibility process. Ideally, use of City-owned or acquired land would be encouraged so that the City could maintain control over the quality of the facility and its operation.*
- ❖ *Develop an RFP for construction and operation of the appropriate facility. It would be most beneficial if the City could recoup operating costs over time such as through rentals and other earned income, naming rights, and other approaches to generate revenue from the facility. In other words, the financial sustainability of the facility should be maximized through the feasibility process, design, development, and operation.*
- ❖ *If the City is not willing to lead this process alone, then a public-private partnership might be formed with an independent authority comprised of the City, County, University and/or interested private sector investors.*
- ❖ *Ultimately, the objective should be to maximize the positive economic impacts on downtown and the city overall, such as through spin-off investment in downtown restaurants, retail, business space, and housing. The revitalized downtown would become part of the city brand for recruiting business.*

Business Recruitment

The market analysis forecasted potentials for retail and commercial uses in the downtown area and citywide. However, the analysis found that net new business development would require leveraging through a “destination” marketing strategy as outlined in this report, focused on capturing the regional market for mountain recreation and mountain-based tourism; building the “college town” appeal for small businesses, entrepreneurs, and retirees; and investing in high-speed Internet infrastructure that can deliver services that appeal to the same businesses and investors that are drawn to small-town living. Specific retail / commercial businesses have been identified through the market analysis, but the other “location-independent businesses” such as small tech firms, artisans, designers, and back-office service providers could also be attracted through a pro-active economic development outreach strategy. Some key elements of business recruitment are outlined below.

Start with Eating and Drinking

As noted in the market analysis, downtown is seen as the core node for a “destination” marketing strategy that builds on Clarksville’s unique characteristics to appeal to destination shoppers and tourists. An assumption was built into the market analysis that Clarksville would pursue liquor-by-the-drink status, at least within a confined area of downtown (such as by allowing a restaurant with a bar or brewpub establishment). By doing so, it has been shown time and again (such as in Russellville) that downtown areas will see an immediate uptick in economic activity. In general, restaurants generate a substantial share of their profit margin from wine and spirit sales, so by allowing those sales, there is a stronger likelihood that downtown restaurants can survive and prosper. This is especially true in a city like Clarksville that has a growing student population on downtown’s doorstep.

Create a Targeted Restaurant Incentive

The City can, again like Russellville, control the licensing of restaurants that sell liquor, thereby reducing many of undesirable impacts. Some communities, like Valparaiso, Indiana, purchased liquor licenses from the State issuing agency and then provided the licenses at a reduced price to those entrepreneurs and operators who met specific criteria established for downtown restaurants by the City of Valparaiso. In so doing, the City was able to encourage restaurant development (by taking out the challenges of obtaining a liquor license and by providing liquor-by-the-drink authority) while also controlling the type of drinking establishments that were established (since the City held the licenses).

Both Valparaiso and Russellville saw revitalization of their downtowns practically “overnight” when restaurants were able to enter the market and obtain licensing for liquor-by-the-drink. An education process may be required for local residents who are opposed to liquor-by-the-drink, but in general, the City’s control over the licenses and geographic limit to Downtown-only locations helped ameliorate concerns in Russellville.

Either way, it will become much easier to attract restaurants to downtown Clarksville if the City can use licenses as both an incentive and recruitment tool. Then, the main challenge will be finding appropriate buildings and locations in the downtown area, but the City’s programmatic efforts as explained in Section 2 of this report will help in leveraging rehabilitation. Those programs, matched with the recruitment of restaurants and other businesses, can help awaken downtown building owners and investors to the opportunities they have for rehabilitation and development.

Followed by Entertainment

In addition to restaurants, the target mix includes a substantial entertainment opportunity. Downtown needs a destination entertainment activity, such as a commercial theater, to help capture a broader share of the regional market base. This report has specifically recommended a destination “recreation / entertainment” oriented venue that can offer recreation visitors something unique and a base for their activities in the region (especially if coupled or partnered with a lodging facility). The entertainment component of the venue could offer a space for live performance, including traveling and local/regional music and theatre. Meeting space would also help attract activity that would enliven the downtown. The approach suggested in this report has been that the City or a public-private partnership / authority take the lead in pursuing the development of an anchor destination venue. But if the City is able to attract a private developer/operator, then that is also an option.

Specialty Businesses

Specialty businesses including those that sell high-end, hand-crafted merchandise, are more likely to thrive through a destination marketing strategy that promotes them collectively rather than having individual businesses try to survive as “islands” within the downtown. Gift, novelty, sporting goods, and other businesses (see findings from the Retail Market Analysis) will appeal to the tourist and recreational visitor that is most likely to visit the area’s many natural areas for recreational purposes.

Rather than trying to recruit these individual businesses, it would be recommended that the City, or downtown organization, focus on development of key anchors like the recreation / entertainment, live performance, and/or civic and meeting venues to help create a generator that will have spin-off benefits. Concurrently, it would be important for the downtown organization and chamber to market the downtown area as a destination as outlined in Section 1, focusing on the recreation visitor, college-town lifestyle, and Internet business. As a destination brand and anchor uses are developed, then there will be more opportunity for recruiting specialty businesses. There is also the opportunity to encourage small, local entrepreneurs to open stores in the downtown area so long as they have the backing and experience that will ensure their sustainability. Incentives for small businesses are also encouraged, as outlined below.

Business Incentives and Entrepreneurship

There are several approaches for assisting businesses directly in order to recruit and sustain the business base in the downtown area. The City might implement these programs and advertise them as part of a broader economic development effort on collaboration with the county.

High-Speed Internet Services

As noted above, the City's utility can work on developing a first-class high-speed internet service that can be marketed to help recruit small entrepreneurs and businesses to the community. Free web access in the downtown area would provide part of the packaging of incentives that would appeal to prospective businesses.

Building Rehabilitation Incentives

This section has outlined various building incentives that can not only assist the building owner or investor but also businesses who wish to own their building.

Restaurant Licensing Incentive

Discussed above is an incentive for restaurants that entails a short-cut in the liquor licensing process and reduced cost for licenses themselves, so long as restaurants meet requirements set forward by the City for operation of such businesses in the downtown area.

Anchor Development

As noted previously, City or collaborative efforts to develop anchor attractions and civic spaces in the downtown area can help attract an audience, thereby enhancing the market for downtown businesses.

Business Equipment Grants

There are also other types of direct assistance that can be provided to businesses, such as through a grant program that encourages investment in personal property like baking equipment, coffee machines, or computers. Such investment adds to the property base and therefore, the tax base in the community. So, providing an up-front grant for acquisition or installation of such equipment can have long-term fiscal benefits to the City on a recurring basis. Meanwhile, such grants obviously help a business get a footing by reducing one of their largest up-front expenses. Funds generated from sources like the local option sales tax might be dedicated for this purpose.

Training Grants, Collaborations, and Shared Work Spaces

The City could work with the County and with University of the Ozarks on training programs that help secure a labor force for new businesses as well as for entrepreneurs. The business training program itself could be housed downtown, such as in a City-owned building or donated space. Again, collaboration with private building owners can help in securing such opportunities. Further to this is the opportunity for incubators, or shared business spaces, that help to reduce the overhead costs to emerging small businesses. Linkages would be provided between those entrepreneurs graduating from training programs or the university, and subsidized or shared spaces in the downtown area. Such spaces are increasingly provided as a commercial, for-profit activity. The more entrepreneurial activity that occurs, then the more there are people on the street. That activity translates into more of a market for downtown goods and services.

Clarksville/Ozark Entrepreneur Initiative

Decatur, Alabama has lost population and economic base for several decades. In response, the City has instituted one of the nation's first comprehensive incentive packages to recruit young STEM graduates because of the city's proximity to Huntsville, one of the nation's top-ten cities for engineers. **The incentive package includes student loan repayment of up to \$3,000 per year for up to 5 years (\$15,000 maximum), ongoing mentorship, career networking and opportunities, and "the ability to influence events in our city."** To be eligible, applicants must have graduated from an accredited postsecondary institution and be legal residents.

The City of Clarksville could offer a similar but unique incentive in collaboration with, or on behalf of, the University of the Ozarks. This incentive might offer a similar student loan repayment plus a housing stipend or other housing location assistance in the downtown area. The basis might be associated with applicants who are pursuing

entrepreneurial opportunities in environmental technologies, conservation, sustainable agriculture, and web-based businesses.

The City might provide some assistance to building owners who convert or rehabilitate their downtown properties for housing, such as through the building incentives identified in Section 2 of this report and/or through tenant guarantees (associated with the loan repayment program) much in the same way that the university could provide housing tenant guarantees for its staff and faculty in downtown-area buildings. Ultimately, the objective would be to retain recent UO graduates and attract others to build in Clarksville a concentration of skills and entrepreneurial activity focused on the university's unique strengths and the area's competitive advantages.

4.4: Conservation and Recreation Plan

Of the 6,680 acres of vacant, undeveloped and agricultural land within Clarksville's city limits, over 2,000 acres are encumbered by floodways, floodplains, or steep slopes. If urban development were restricted to land outside these environmentally sensitive areas, Clarksville could increase commercial, residential, or industrial activity by an estimated 45 million square feet. This figure puts into perspective just how much opportunity there is for development within the city limits. It also reveals an impressive amount of land that can be utilized for creative recreational or natural preservation purposes, creating a major recreational and tourist destination.

The city should explore ways to expand and preserve the Spadra Creek Greenway/Blueway.

While North and West Clarksville remain prime areas for economic expansion, it must be noted that an additional 1,680 acres of undevelopable, flood-prone land exists in the planning area, outside the city limits. Making plans to establish conservation districts that house important recreational facilities will pave the way for future

recreation purposes. This land cannot be used for commercial development, but it can be used to enhance the City's quality of life. Clarksville's current stock of recreational land is estimated at 313 acres, with no designated conservation easements. During the community outreach portion of the comprehensive plan, it became apparent that while the city has a healthy supply of parks and recreational facilities, important additions must be made. Therefore, what initially seemed to be a problem for future commercial development could be the solution to Clarksville's recreational needs. As Clarksville expands beyond its current city limits in the years to come, it must adopt a mindset of establishing conservation easements, and making plans for recreational amenities as it incorporates property that cannot be utilized for commercial developments.

It is common for conservation districts to house recreational facilities such as hiking or biking paths, walking trails, or recreational fields. The two land uses complement each other, with conservation districts sometimes enabling the presence of recreational land uses. Clarksville possesses plenty of described land uses necessary to establish conservation districts, which could generate recreational facilities, enhancing the City's quality of life. For example, the presence of the Spadra Creek and surrounding flood zone is an existing recreational advantage upon which the city can capitalize. Plans for connecting the beautiful trail east of downtown all the way south to Spadra Park in south Clarksville are included in this plan.

Below we describe three key components of the recreation and conservation portion of the Master Plan: parks assessment, new park proposals, and preservation of environmentally sensitive land. New trail proposals are located in the Mobility Plan.

Parks Assessment

Public recreational spaces have been a component of every city throughout time. They provide opportunities to escape one's home, spend time with others, or a place for inexpensive occasions such as birthday parties or picnics. Parks are important for these and other reasons because they reflect the city's priority with regard to lifestyle and culture. A city with very few, dilapidated parks reflect the city's lack of investment in public health. The exact opposite is suggested with the presence of many vibrant parks.

In this section, we detail the state of Clarksville's parks as it compares to the standards set forward by the National Recreational and Park Association. According to performance review metrics by the NRPA, the typical city possesses 9.6 acres of parkland for every 1,000 residents. Fortunately, the city currently possesses 313 acres of recreational public space, meeting this standard well in excess.

Analysis of Clarksville's park system against NRPA standards reveals the plan's focus should be on improvement of current facilities.

The other significant metric is overall number of parks. The NRPA metrics stipulate that a healthy city have one park for every 2,266 residents. Based upon this, Clarksville should have four full-service parks. The city has four parks which can be considered full-service. Meeting these key metrics, a point of focus for the recreation and conservation plan is strategic improvement of existing parks.

While parks in Clarksville need additional improvements, they are generally considered clean and well-maintained. Below we provide analyses for each park based on the existing land use and future land use maps, as well as the information received at community input events.

City Park: Nearly 12 acres large, the Clarksville City Park contains a new playground facility, an area for dogs to play, and a skateboarding area. The main park area contains public restrooms, two picnic tables and a grill for parties and outdoor events. Located within close distance to many neighborhoods, the City Park is accessible and well equipped for youth baseball games.

Key Recommendation 4.5.1: The city should explore relocating the existing baseball field to accommodate a youth soccer complex at the site. The site is adequate to place at least six under 10 soccer fields. If the fairgrounds are relocated to a site at the edge of town a full youth and recreational soccer complex could be constructed that would allow Clarksville to host soccer tournaments. Additionally, the skate park is located away from the playground and parking lot. It is recommended the city consider installing a sidewalk or paved trail along Fairgrounds Road.



Pocket Park: This half-acre park is an aesthetically pleasing sitting area near downtown. Being slightly too small for commercial development, the pocket park is a favored rest area for nearby residential offices. With sidewalks connecting the park through the intersection down Main Street to Downtown, the area is integrated with the city. No changes are recommended.

Spadra Creek Nature Trail: Considered Clarksville's premier recreational attraction, the trail runs through the largest floodplain area within the city limits. The trails measure three miles long combined. The west side is ADA accessible, including seating, picnic tables, and lights. The east side is a natural path with steeper, more difficult terrain. The trail has been extended to University of the Ozarks via crosswalk near University and College.

Key Recommendation 4.5.2: Spadra Creek Nature Trail is a well utilized recreational amenity in the city, and measures have been taken to make the primary trailhead near the abandoned Wendy's on Rogers Street accessible. It is recommended that city-designated signage be established along Rogers and at the trailhead turnoff. Because park and trail usage is expected to increase in future years, it is recommended that the abandoned building be torn down.

and the property be utilized for a small park. Accommodating a playground, swings, and a pavilion, the park would serve as an aesthetically pleasing park location as well as official trailhead for the Spadra Creek Nature Trail. The existing trail should be expanded as a nature trail south to Spadra Creek's confluence with the Arkansas River.

Cline Park: Where City Park lacks in size, Cline Park can accommodate a greater number of users with its two playgrounds, 2 baseball fields, restrooms, walking trails, pavilions, fishing pond, swings, disc golf course, and batting cage. Located off Meadow Place, the park features plenty of parking and is located in a low speed limit neighborhood.

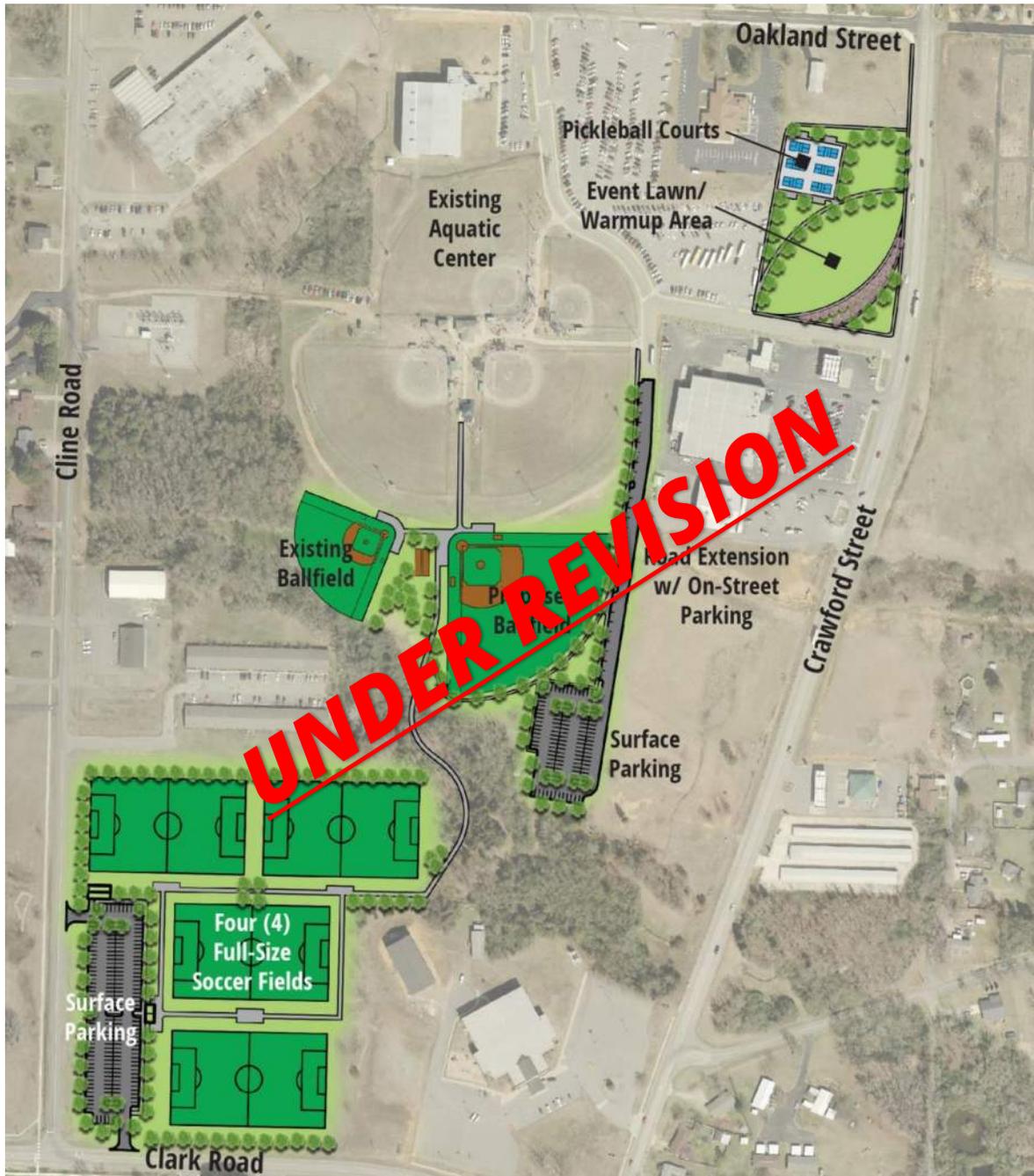
Key Recommendation 4.5.3: The existing tennis courts should be renovated. Beautification and increased recreational access to the creek should be prioritized to create a centerpiece passive recreation feature for the park.



Marvin Vinson Activity Center: The community center features an aquatic park, basketball courts for boys and girls, tournaments for volleyball, and meeting rooms for businesses or banquets. The Clarksville Aquatic Park is also located near the center, which is a prime recreational attraction for the community. Complete with two large baseball diamonds and one small diamond, the Marvin Vinson Activity Center is truly the focal point of community activity.

Key Recommendation 4.5.4: While other parks offer baseball fields, the Marvin Vinson Center is the one location in Clarksville that features a collection of every form of recreation. It is recommended that Clarksville consolidate its resources and make the park a premiere regional recreational center, and designate other parks as local parks. The park could be an alternative location for moving the city's soccer fields. The city should explore expansion of the park's ball fields to create a unified Sports Complex. This will allow Clarksville to host more baseball, softball, and soccer tournaments, attracting teams and bringing in tax revenue from across the state and region. A final

recommendation is adding lighting, paved paths, and landscaping as the city makes improvements to this vital community destination.



Park Proposals

The second section of the recreation and conservation plan proposes three new park locations. While we emphasize the importance of maintaining and caring for current park facilities above establishing new parks, more parks can be established in strategic residential neighborhoods, improving the City's quality of life. Below are the three proposals, including strategic location and description of proposed amenities.

Key Recommendation 4.5.5: Construct new parks.

Downtown Spadra Creek Greenway Park

Location: Adjacent to the Cherry Street bridge at Spadra Creek in downtown.

Description: Located adjacent to downtown in the floodplain, this park would become a key community asset due to the beauty of the site. It would be intended to enhance and bolster downtown and provide additional space for festivals such as the Peach Festival. It additionally would provide access to the Spadra Creek Trail.

Additional Facilities: The site would feature a stage and an enhanced waterfront along Spadra Creek to increase recreational use and understanding of Spadra Creek's importance. The majority of the park would remain largely untouched due to the natural beauty of the land.

Grandview Pocket Park

Location: Empty lots off South Rogers.

Description: Five and a half acres of vacant land is located adjacent to nearly twenty-four homes located on Poplar, Grandview, and Rogers. An empty lot facing South Rogers provides access to this vacant land to form a two-acre pocket park for nearby residences. Establishing simple park facilities such as a perimeter trail, gazebo, recreational field, and playground will provide a much-needed recreational outlet. The proposal has excellent connectivity via sidewalks down Rogers and a central location to serve the immediate neighborhoods.

Additional Facilities: A painted crosswalk immediately across from the park entrance to the east side of Rogers will provide safe crossing. Adequate benches, lighting, and picnic tables should be established as well.

Harmony Park

Location: End of Miller Street, south of Harmony Road.

Description: Similar to the Grandview pocket Park, the Harmony Park proposal is accessible via a vacant lot. With four and a half acres on-site, the location could be converted into a two-acre park with trails connecting the end of North Street, Miller Street, and Harmony Road. With apartment complexes and single-family homes in the area, this proposed park provides an alternative for recreation with the University of the Ozarks occupying most recreational facilities in the area.

Additional Facilities: The park proposal is located just north of a future shared-use trail as planned in the Transportation and Mobility Section. Establishing signage as a way to bring attention to this pocket park will increase recreational connectivity in North Clarksville.

Preservation of Environmentally Sensitive Land

Clarksville's scenic location south of Ozark National Forest provides it with a great potential for high quality of life. With the Spadra Creek Greenway located to the south and additional creeks located throughout the city limits and planning area, the city has the responsibility to preserve these important environmental assets. Although the City has several important industrial plants, Clarksville has maintained a certain amount of tree canopy within the city. Tree population within a city enhances aesthetics, providing a framework for future development. As previously established, preserving green spaces such as floodplain for public enjoyment are integral to the city's future quality of life.

Clarksville's Tree Population

Clarksville's tree population is highest in density along the Spadra Greenway, south of Main Street, and in the areas around *U of O*. Key areas lacking in tree density are downtown, along major corridors, and near Clarksville High School. Trees provide benefits such as community aesthetic, managing soil erosion, and providing shade. In order to pave the way for a healthy tree population in Clarksville's future, we recommend that the city council adopt the following principles.

Key Recommendation 4.5.6: Explore ways to preserve Clarksville tree canopy as the city grows.

Adopt regulatory incentives for tree preservation in Clarksville's subdivision code.

The City's subdivision code does not require residential tree plantings or credit which can be applied toward landscaping requirements. The city should consider adding regulatory incentives, such as increasing density or reduced storm water requirements for new developments that ensure large areas of trees will continue to support local ecosystems and forested areas.

Install trees as a part of commercial streetscape improvements where necessary.

By adding specific landscaping and tree regulations within the City's subdivision code, every land use would be subject to tree requirements. As the city identifies key areas of development such as streets and commercial areas, streetscape designs should include trees that enhance the character of the area and screen unsightly utilities or land uses, such as industrial plants.

Strategize methods to support residential tree planting.

Some residential properties in Clarksville do not have tree canopy. This can be owed to pertinent regulations being absent from the city's subdivision code. As such, Clarksville should support tree planting through municipal programs. Most prominent are methods such as "buying bulk", where the city purchases trees at a bulk price and residents can then purchase seedlings from the city at a lower cost. 50-50 tree planting programs are also effective ways to increase greenery, where the city and residents share the cost of purchasing and installing new trees.

Partner with local and regional organizations and advocates.

Organizations such as the Clarksville Tree Board, Arkansas Forestry Commission, Arbor Day Foundation, and many others in Arkansas would be willing to partner with Clarksville to address the city's lack of trees. Local entities would likely be eager to join in. With nearly three-thousand students and environmentally focused programs of study, University of the Ozarks could become a main source of tree canopy advocates. Volunteers from the university could earn credit planting and maintaining trees in the city. The city should coordinate with these state and local bodies to enhance awareness of tree planting opportunities and provide materials for installation.

Review and update the development regulations to ensure special appropriateness and diversity of species. Perhaps the most important step Clarksville can take toward this goal, adopting zoning code and subdivision code-specific regulations regarding tree population would ensure future tree population in the city. Codes should also require selecting from a list of species to ensure diversity and reduce the impact of disease or infestation that could destroy a less diverse tree population.

Clarksville's Floodplain

As previously mentioned, it is estimated that 2,594 acres of floodplain exist within Clarksville's city limits, and an additional 1,680 exist within the planning area. The characteristics of flood-prone areas make development challenging or impossible. However, these areas can be reserved for conservation districts that house recreational facilities such as trails and ponds. While Clarksville has a considerable amount of acreage within these areas, they should be considered inherent opportunities for preserved natural areas, public open spaces, or greenways that support stormwater management and multi-modal mobility. Other communities in Arkansas such as Bentonville and Fayetteville have leveraged their floodplain from local streams and creeks into greenways that support cycling and pedestrian activity. From analyzing floodplain, development constraints, and input from Clarksville residents, the concept of establishing two primary conservation districts emerged.

Key Recommendation 4.5.7: Create a greenway system.

Spadra Creek Greenway

The Spadra Creek houses the most popular recreational attraction in Clarksville, the Spadra Creek Nature Trail, with nearly three miles of paved and natural paths. However, no official easement has been set protecting this lush recreational area. This plan proposes establishing the conservation easement from the northeast city limits where the floodplain is prevalent all the way south to Spadra Park. Establishing a conservation easement will allow protection against unnecessary development that could encroach on plans for quality of life facilities such as trails and parks. Establishing an easement and taking intentional steps to protecting this area will pave the way for recreational opportunities in the future.

Central Clarksville Greenway

Floodplain in Clarksville is caused by two creeks that branch off the Arkansas River into eastern and western branches. The Spadra Creek Greenway comprises much of the eastern creek, and the western creek provides floodplain that comprises the proposed Central Clarksville Greenway. Located in close proximity to residential areas near Shamrock Drive, this proposal is in alignment with the Transportation and Mobility section, which proposes an extensive shared-use trail system through the area running north to Buchanan Street. Establishing a conservation easement from the south starting at Spadra Park extending to Main Street is a natural action to take considering the extensive amount of floodplain.

Guidelines for Greenways:

Establish easements to protect the Spadra and Central Clarksville Greenways

The most important method to protect environmental areas, establishing easements will prevent unnecessary development from occurring. Clarksville would benefit from this in a number of ways, chief among them being that development is highly restricted by the presence of conservation easements. With the future Clarksville trail system locating many of its routes through these two locations, it is important that easements are established.

Strategically locate areas that can be utilized for high-quality residential development

Floodway and floodplain are damaging and potentially catastrophic forces of nature. While establishing an easement would prohibit construction within the greenways, areas on the fringe of the greenway will need to be identified to

protect high-quality future development. As subdivisions and commercial areas are established near the Greenway, implementing methods such as low-impact stormwater management systems and specific landscape design will mitigate any potential flood hazards. The presence of greenways can also be considered a factor that could increase home values, as its presence is a guarantee of recreation and enjoyment of nature for residents.

Establish recreational facilities within the easements

Floodplain and floodway are prime locations for recreational facilities. Shared-use trails, sporting fields and courts, and playgrounds are not easily destroyed by rising water. Locating more facilities within the Spadra Creek and Central Clarksville Greenways would provide residents not only a new outlet for recreation, but also a potentially extensive one. Trails have been planned through these areas as part of the Transportation and Mobility section (4.2) of the comprehensive plan.

4.5: Transportation and Mobility Plan

Master Street Plan

Arterials

This plan suggests access management of arterial roads throughout the planning area as a means to preserve roadway capacity and forestall future street widening. Many of the arterial roads within the planning area are state highways. Access management of these roads will likely require access management agreements with the Arkansas Department of Transportation.

The primary function of an arterial is to move high-volume traffic. Ideally, this function would be protected. However, historic development patterns and economic factors sometimes lead to problems in maintaining high-volume traffic flow. Many of the city's arterial roads were initially constructed and subdivided in a manner that placed a priority on access, not moving traffic. As the city has grown, traffic along these primary corridors has increased dramatically and their roles have changed. This access-traffic flow conflict reduces their efficiency and capacity. Such issues cannot be easily or readily amended, and addressing them requires steady planning and dedicated, long-term implementation of access management standards and policies.

Economic factors can also play a role in determining the long-term efficiency and capacity of arterial roads. The high traffic volumes on arterial connectors attract commercial development that desires a great degree of property access. These development demands can easily result in arterial roads littered with curb cut after curb cuts and greatly diminished capacity and traffic flow. Because cities in Arkansas depend heavily upon sales tax revenue, the Planning Commission faces a constant need to balance traffic concerns with economic development concerns. Finding that balance will be important to ensuring economic growth and protecting taxpayers. Methods of achieving this balance include access management. The plan does not propose construction of new arterial road facilities.

Collectors

It is typical to design collectors so they will not function as continuous through streets, but serve to collect traffic and empty onto adjacent arterial corridors. In a grid-street pattern, a street several miles long may serve as a collector rather than an arterial if its predominant use is only to reach the next junction with an arterial. This improved connectivity allows the transportation system to be less dependent on large arterial roads to move traffic. Examples of this kind of network can frequently be seen within the older portions of many cities.

The policies and proposals of this plan support a street network that uses collector streets to improve connectivity. The City will strive for a system of collector streets spaced approximately one-quarter to half a mile in both north-south and east-west directions. In most cases there are existing streets or extensions of existing streets. In undeveloped areas, they are indicated on the Plan Map as general locations. As new developments occur, developers will be responsible for construction of the collector street system. This will include improving all or a portion of existing streets located within or adjacent to the developments.

Some streets designated as collectors are fully developed in a manner that will preclude their being brought into compliance with the standards adopted. These are maintained as collectors on the plan for two reasons. First their designation as collectors may result in avoiding any further degradation to their functional classification. Second, in the event that major redevelopment does occur in the future, the Planning Commission may, at that point require that such redevelopment adhere to the provisions of this plan.

East Clarksville

Project: Highway 123 to Harris Road (1)

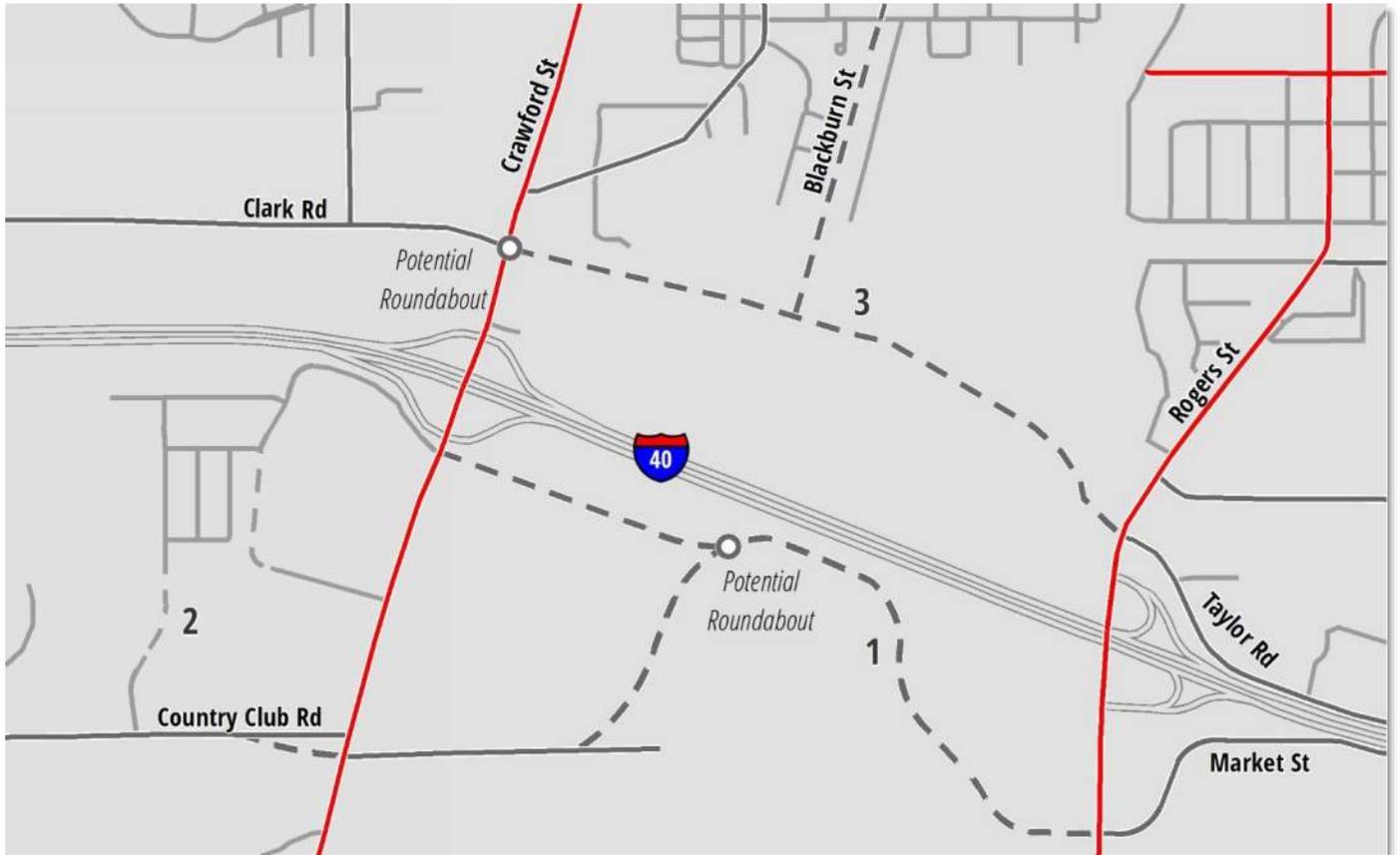
Purpose: This proposed collector will distribute traffic from State Highway 123 to Rogers Street and open new areas to development. The roadway will likely not relieve a great deal of traffic as counts are already fairly reasonable along Poplar Street. As such, the roadway should be prioritized based on its potential impact in enabling development.

Project: Taylor Road to Harris Road, Carter Street (2)

Purpose: Taylor Road is an important collector located immediately off the freeway. This extension is proposed as a north-south connector to Harris Road as well as the edges of Carter Street. This will serve to promote future development as well as provide a necessary corridor for this area of Clarksville.

Project: Sherwood Drive to Carter Street (3)

Purpose: This proposal is estimated to be only 0.15 miles long, but it serves as a significant connector. As a part of the entire Master Street Plan, this small collector would connect Sherwood Plaza with Carter Street, and ultimately State Highway 123, providing a direct avenue for those traveling to and from Lamar. This proposed collector would also stimulate development, extending the plaza to the southeast.

Middle I-40

Project: Market Street to Country Club Road, Interstate Drive (1)

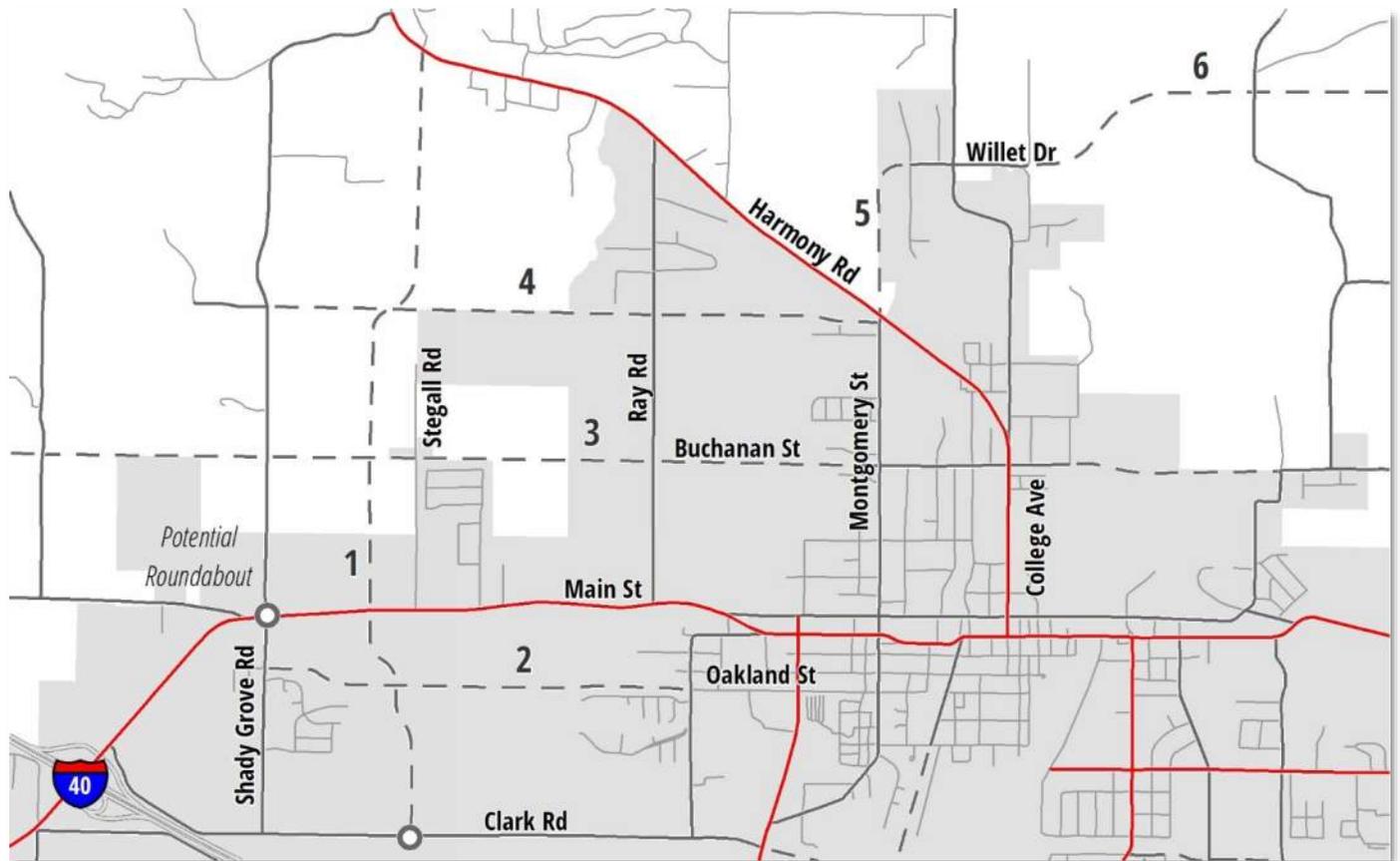
Purpose: A multi-destination collector proposal, this would serve to connect Country Club Road and southwest Clarksville to the Walmart Shopping Area, bypassing the need to use I-40. A roundabout is proposed at the diverging point between Country Club Road and Interstate Drive. This project also includes an alignment correction at Country Club Road and Crawford Street. Logistically challenging and likely expensive, this project will become a necessity as southwest Clarksville continues to grow.

Project: Dunwood Drive Extension (2)

Purpose: Skirting the subdivision near Freeway Lane and the apartment complexes off Country Club Road, this local road would connect residential areas with Country Club road. This connection would facilitate a second entrance to apartment complex for safety and open additional land for commercial or residential development.

Project: Taylor Road to Clark Road, Blackburn Street Extension (3)

Purpose: This connection would provide the only east-west connection south of Main Street on the north side of I-40. It would connect the Rogers Street area and East Clarksville neighborhoods to the growing Clarksville Schools campus on Clark Road. The Blackburn Street extension would run along old railroad right-of-way and increase connectivity and access to the Clarksville Schools campus.

North Clarksville

Project: Clark Road to State Highway 103/Harmony Rd (1)

Purpose: This roadway would provide a needed north-south connection on Clarksville's west side between Highway 103, Main Street, and Clarksville High School on Clark Road. It would allow greater dispersal of school traffic and provide a new route for truck traffic between Highway 103 and Main Street that does not traverse the U of O campus. The corridor could additionally help spur new residential developments.

Project: Oakland Street Extension (2)

Purpose: This street would provide increased connectivity and open additional land for development north of the Clarksville School's campus row.

Project: Buchanan Street Extension (3)

Purpose: This road extension would connect Mill Road on its eastern end to County Road 22 on its western end, providing a parallel route to Main Street and increase connectivity. Traversing through primarily vacant land, it would extend Clarksville's grid street system as land develops.

Project: Montgomery Street to County Road 21 (4)

Purpose: This new street would serve as a continuation of Clarksville's street grid, bypassing subdivisions along Ray Road. The street additionally provide another east-west connector approximately ½ north of the Buchanan Street extension.

Project: Montgomery Street to Willet Branch Way (5)

Purpose: This short collector would continue Montgomery at its intersection with Harmony Road, and connect to the Willet Drive extension. The street would improve connectivity and help divert traffic around the U of O campus.

Project: Willet Drive to County Road 3530 (6)

Purpose: This extension should be considered a very long-range project and would increase connectivity in the northeast part of the city, providing a connection between Highway 21 and Highway 103.

Bicycle/Pedestrian Facilities

Users

While designing bicycle and pedestrian facilities, it is important to consider the types of users that will accommodate the facilities constructed. This plan is designed around the concept of readily accommodating pedestrians and casual bike riders. As such, more emphasis is placed on bike and pedestrian facilities that separate users from traffic and make them feel safer. Below is a description of the use types taken from AASHTO's *Guide for the Development of Bicycle Facilities, 2012*.

Confident/Experienced Riders

This group includes cyclists who are comfortable riding on most types of bicycle facilities, including roads without any special treatments for cyclists. This group also includes utilitarian and recreational riders of many ages who are confident enough to ride on busy roads and navigate in traffic to reach their destination. Other cyclists, however, may prefer traveling on lower-traffic residential streets or shared-use paths. Such riders may deviate from the most direct route to travel in their preferred riding conditions. Experienced riders may include commuters, long-distance road cyclists, racers, and those who regularly participate in rides organized by clubs.

Casual Riders

This group includes a majority of the population of a city and includes a wide range of people: A) those who ride frequently for several purpose, B) those who enjoy biking occasionally but may only ride on trails or low-traffic and/or low-speed streets in favorable conditions, C) those who ride for recreation, often with children, and D) those for whom the bike is a necessary mode of transportation. In order for this group to regularly choose biking as a mode of transportation, a physical network of visible, convenient, and well-designed bike facilities is needed. People in this category may move over time to the “experienced and confident” category.

Bicycle and Pedestrian Facility Types

The following table provides details on the facility types for the bicycle and pedestrian elements of this plan.

Trails	Class	User	Detail
Shared-Use Trail (Separated)	I	Pedestrian/ Bike	A trail, at least 10' wide, designed for use by a variety of users. Located separate from a roadway facility with a park or linear trail system, such as Spadra Creek Greenway.
Shared-Use Trail (Road)	I	Pedestrian/ Bike	A trail, at least 10' wide, designed for use by a variety of users. Located adjacent to a roadway facility as a means of providing safe facilities of casual and less confident bike rider and pedestrians.
Bike Facilities			
Bike Lane	II	Bike	A portion of a roadway (lane) that has been designated by striping, signing, and pavement markings for the exclusive use of bicycles.
Bike Route	III	Bike	A traffic lane with pavement markings and signage, typically a sharrow or wide shoulder, that indicates the driver is on a bicycle route and is to be shared between vehicles and bicycles.

Pedestrian Connections			
Sidewalks	N/A	Pedestrian	Separated pedestrian paths, at least 5' wide, that are used to make pedestrian connections to the trail system.

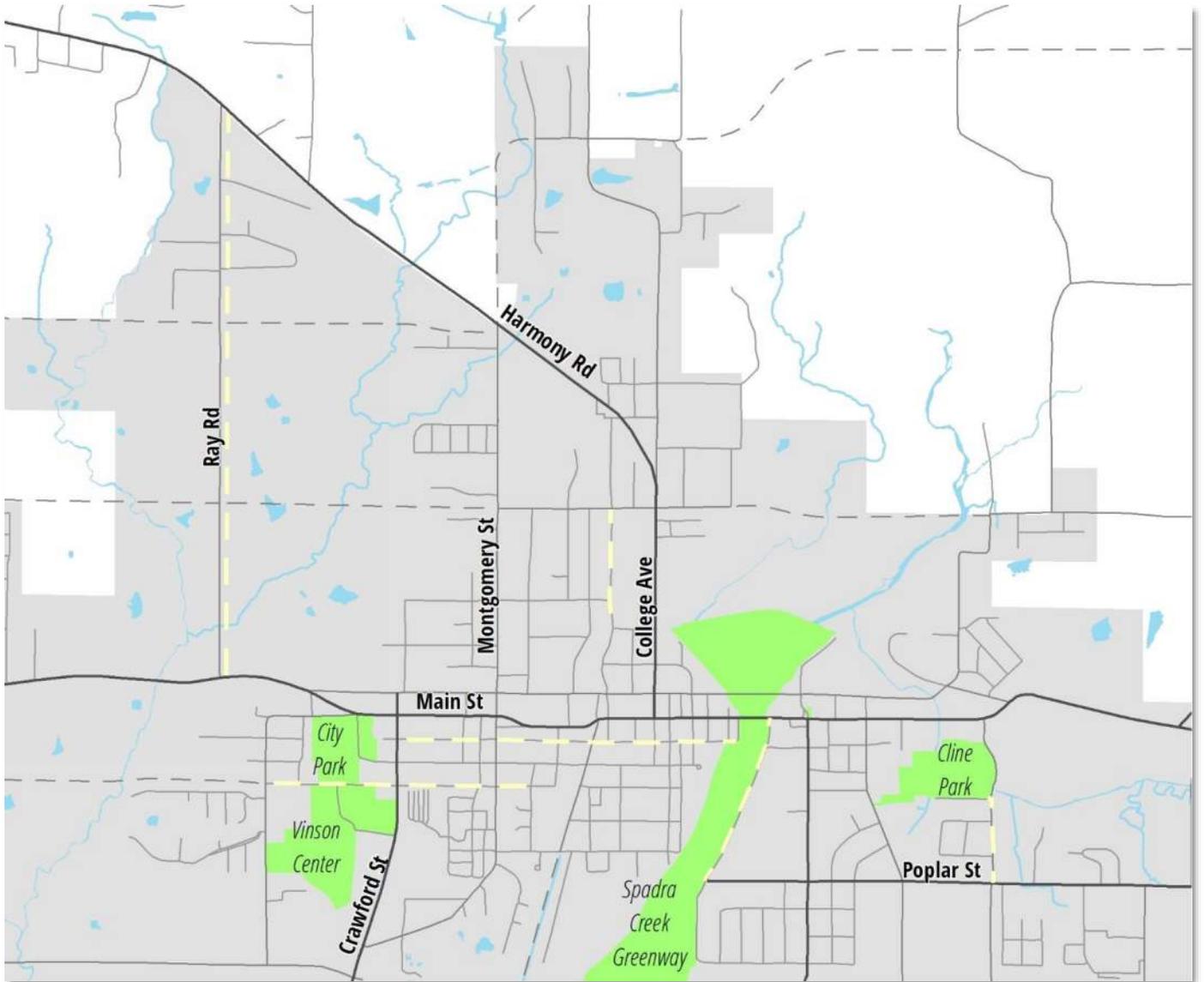
Existing Trails

The following map details existing trails and parks within Clarksville.



Proposed Bike Routes

The following map displays low-traffic streets in Clarksville suitable for bike routes with appropriate signage. These routes complete the Bike/Ped plan through connecting existing trails to proposed bike lanes, trails, or destinations, such as neighborhoods, downtown Clarksville, or University of the Ozarks.

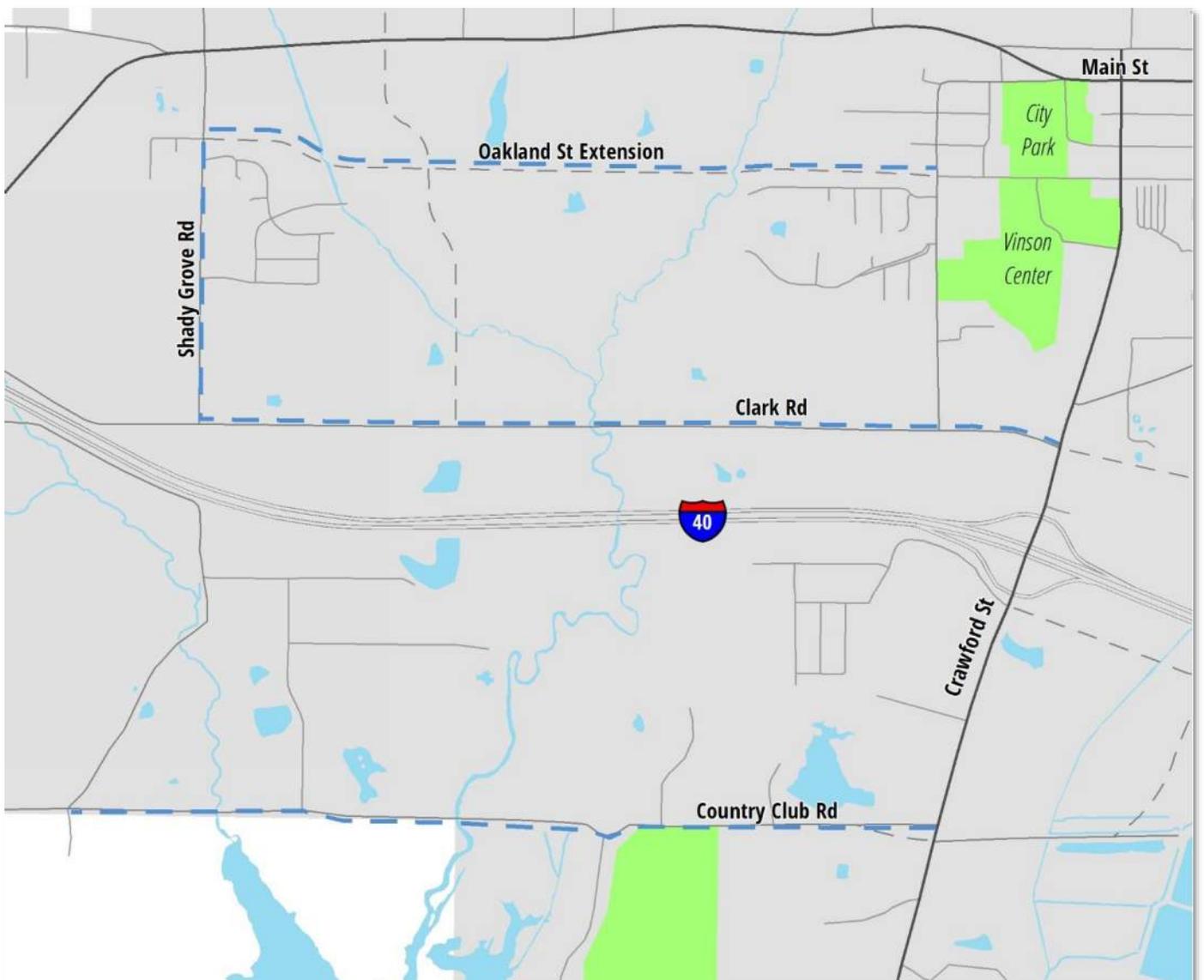


Proposed Bike Lanes

West:

The following map details proposed bike lanes and bike routes in the western areas of the City.

- *With low traffic and high-density residential living nearby, West Country Club Road would greatly benefit from bike lanes as the area develops, serving to connect the area to the proposed expanded Spadra Creek Greenway.*
- *Clark Road is already a valuable collector in the city. With a new school considered in the area, lanes for bikers would provide bike/ped-friendly infrastructure that would encourage future development.*
- *Although Oakland Street has not yet been extended, the addition of bike lanes would encourage a residential-friendly area, which is a high possibility for the area.*



East:

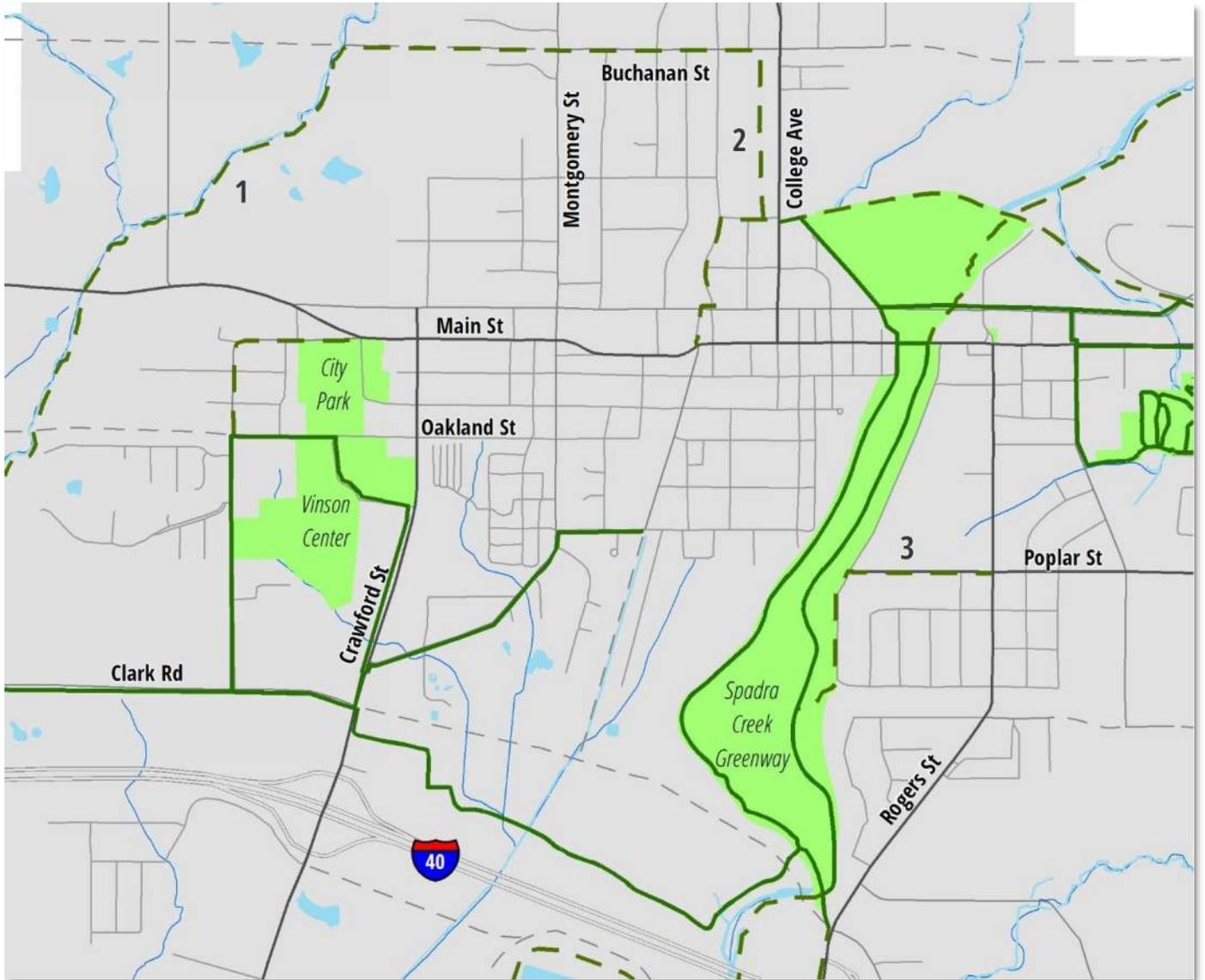
The following map details proposed bike lanes in the eastern areas of the City.

- *Blackburn Street* – adding bike lanes to this area would provide better connection to the Clarksville Schools area and the Spadra Creek Greenway.
- *Highway 123 to Sherwood Drive* – the addition of bike lanes in this area is dependent on the addition of a future collector road. This area is mostly residential.
- *Poplar Street* – this highway is much wider than needed for its current traffic flow. Adding bike lanes could help reduce speeding on the roadway and provide an attractive riding area.



Proposed Shared-Use TrailsCentral Clarksville:

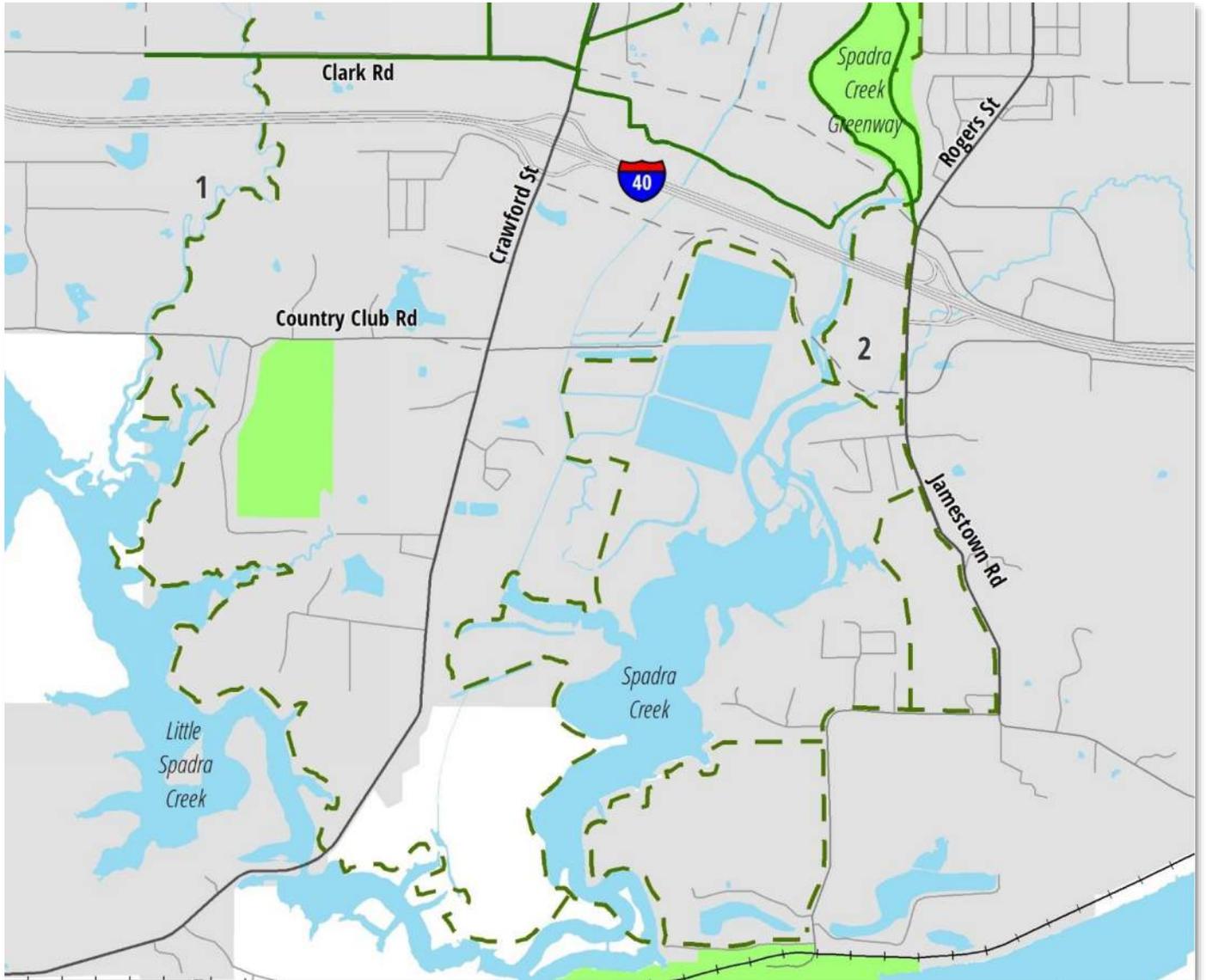
The following map depicts proposed shared-use trails, both road and separated, in the central area of the City. These Shared-Use Trails are intended to provide recreation opportunities and transportation alternatives.



1. The Little Willet Branch trail will connect the Clarksville School campuses to the College Hill Neighborhood and the University of the Ozarks.
2. The plan proposes trail connections through the University of the Ozarks campus to provide better access to students and further leverage trail improvements as a college recruitment tool and quality of life improvement. This trail will be called the Clarksville Town and Gown Trail.
3. This Shared-Use Trail is intended to skirt Poplar and Grandview, traveling South to connect the surrounding neighborhood to the Spadra Creek Greenway.

Southern Clarksville:

The following maps depicts proposed shared-use trails, both road and separated, in the southern area of the City. These trails are intended to expand the Spadra Creek Trail into a comprehensive bike/ped system that takes full advantage of Clarksville's natural features.

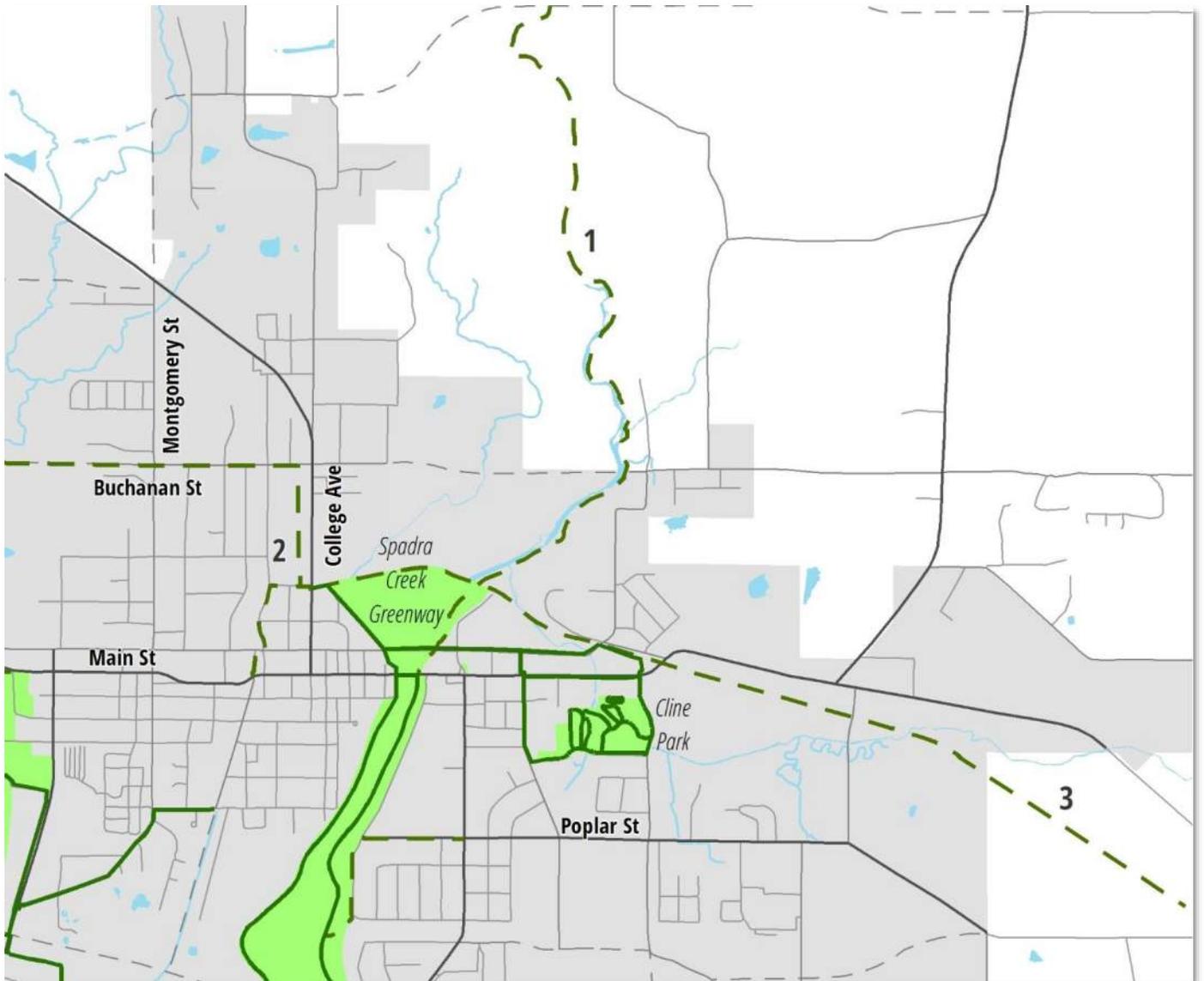


1. The Little Spadra Creek Trail will connect to the Little Willet Brank Trail and the Clarksville School campuses, providing a valuable looping expansion of the Spadra Creek Greenway Trail System.

2. The existing Spadra Creek Greenway Trail will be extended south under I-40 and branch out into a systems of trail along Spadra Creek and Jamestown Rd. This trail will support the Spadra Creek Blueway.

Northeast Clarksville:

The following map depicts three proposed large-scale separated and road shared-use trail in the north and eastern areas of the City.



1. Northern Path – Beginning at existing trail infrastructure, the Northern Path is anticipated to provide natural bike/ped amenities to the northeastern area of the city, expanding the Spadra Creek Greenway Trail system.
2. Town and Gown – Routed through the center of the University of the Ozarks, this trail will serve to connect downtown Clarksville to its University, uniting town and gown.
3. Lamar Trail – Beginning at Cline Park, this trail would connect Lamar to Clarksville.

Cross Sections

The following cross sections are provided to govern the construction of street and bicycle/pedestrian facilities by the City of Clarksville and through private resources by developers. These cross sections work in tandem with the City of Clarksville’s Street Construction Standards that govern all aspects of roadway design and construction excluding street pavement width, curb and gutter requirements, as well as requirement of bike and pedestrian elements.

Cross Section Naming Convention	
Roadway Class	C1.0-4 : Arterials, C2.0-6 : Collectors, C3.0-5 : Local Streets
Bike/Pedestrian Elements	I : Shared-Use Trails, II: Bike Lanes, III: Bike Lanes

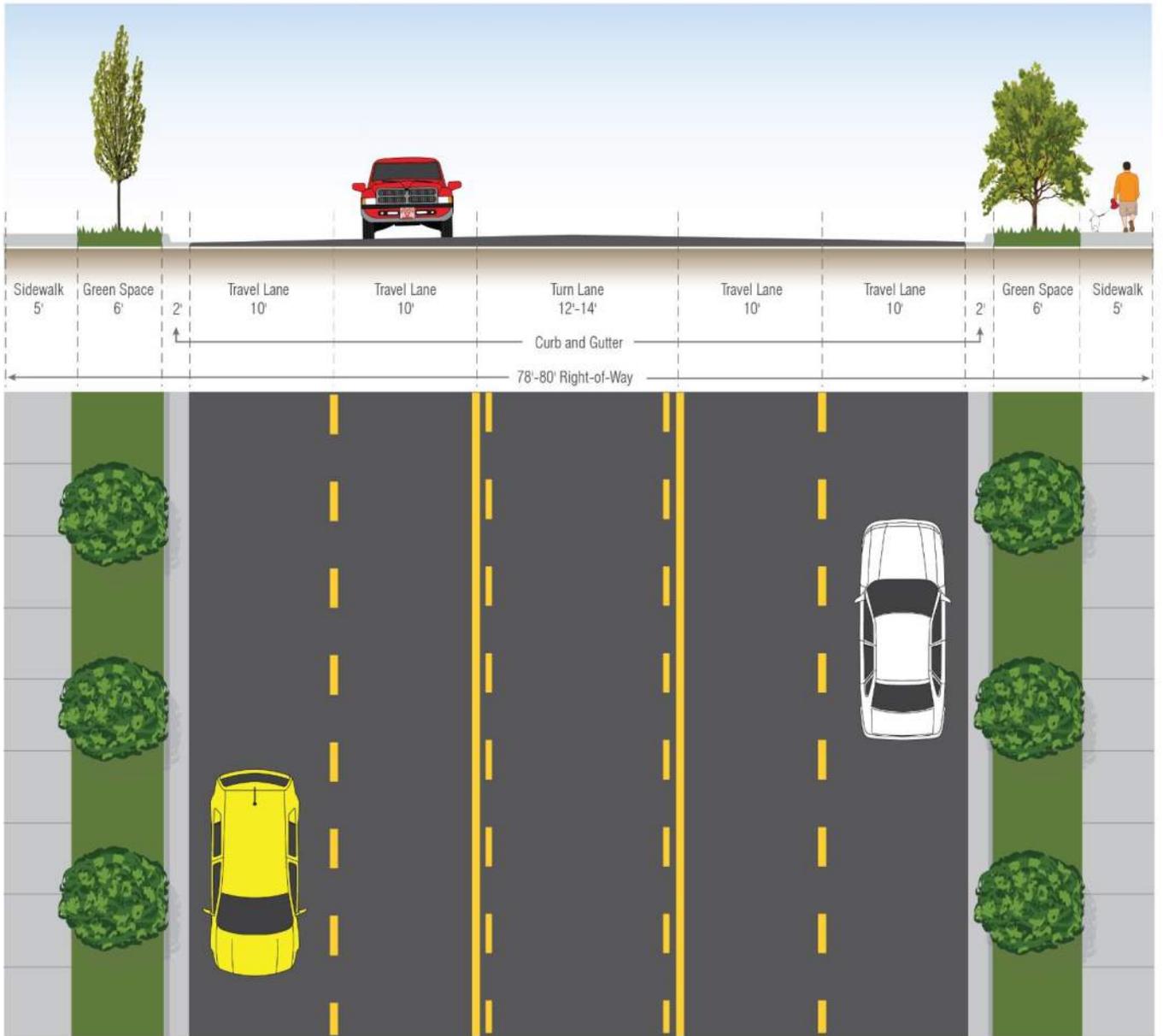
Arterials

Arterials provide network connections within and through the urbanized area. These facilities typically provide a greater amount of access to adjoining land as compared to principal arterials, where the primary function is providing mobility by moving traffic.

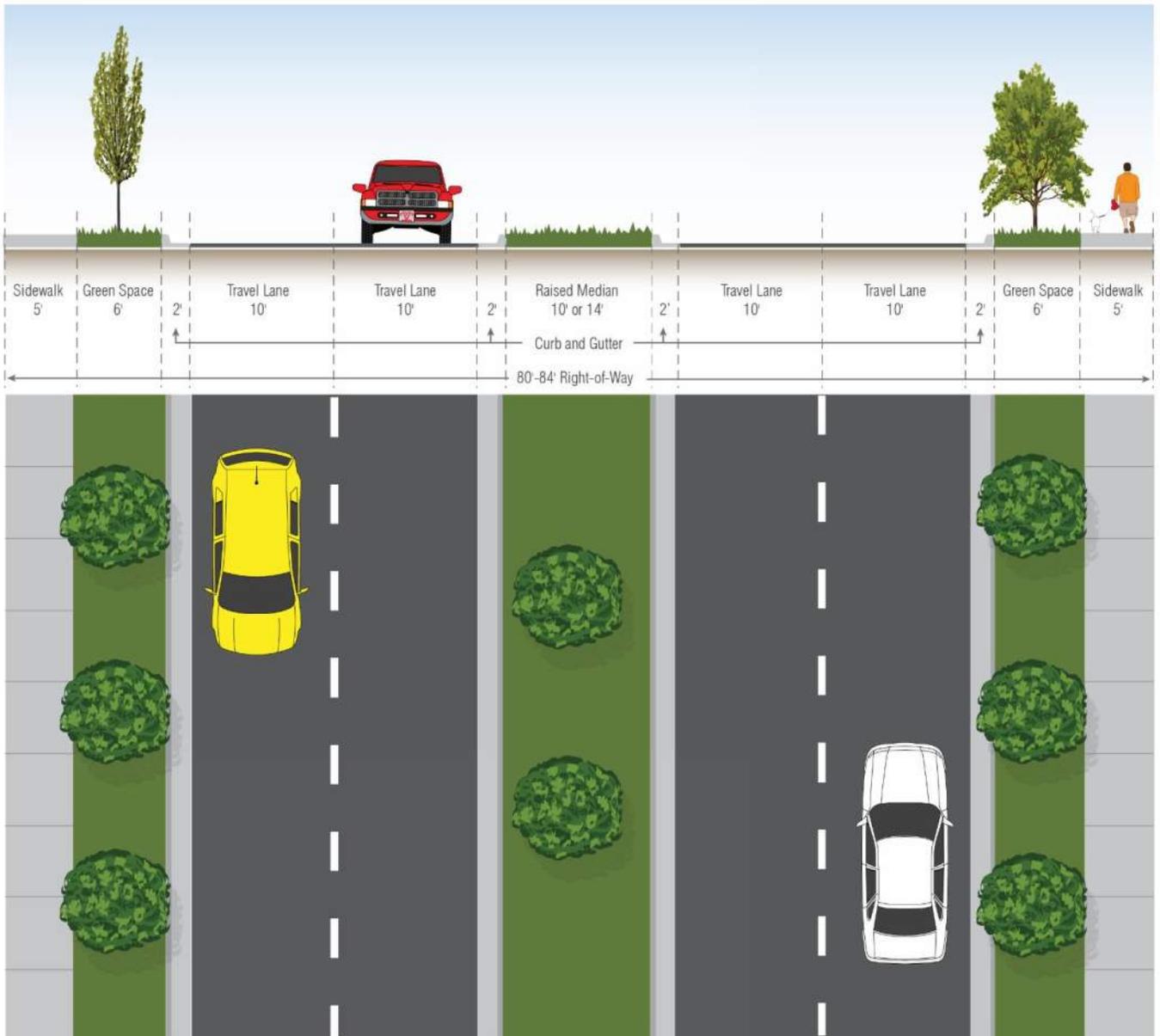
1. Required Elements:
 - a) Right-of-Way: All required design elements must be included in the cross-section and located on publicly owned R.O.W. Sidewalks or bikeways may be located on permanent dedicated easements. The right-of-way must be sufficient to accommodate 4 lanes.
 - b) Curb and Gutter: Curb and gutter is required except in cases where terrain and/or forecast land use densities are compatible with an open shoulder design typically used in rural or exurban areas. The gutter width is not to be included in the travel lane.
 - c) Sidewalks: Sidewalks are required on both sides of the roadway. Minimum sidewalk width is 5 ft. and must be compatible with the Americans with Disabilities Act.
 - d) Green Space Buffers: A buffer is required between the back of curb and the sidewalk that is a minimum of 5 ft. However, no buffers are required in Downtown.
 - e) Pedestrian Crossings: Safe pedestrian crossing provisions are required to be demonstrated by the proposing jurisdiction or agency where more than 50 ft. of pavement (including the gutter) have to be crossed by a pedestrian where pedestrian crossing is anticipated based on land use.
 - f) Bike Lanes/Trails: If on a planned bikeway route, the bicycle element must be included and must adhere to the bicycle design standards shown on the appropriate cross section. Where bike lanes are provided a minimum buffer from the main travel lanes is required.
 - g) Lane Width: 10 ft. minimum for main travel lanes or 11 ft. maximum lanes where the design speed and traffic mix warrant.

2. Optional Elements:
 - a) 8 ft. minimum paved shoulder on first phase of a planned 4-lane minor arterial, with or without curb and gutters.
3. Preferred Elements:
 - a) Landscaping of medians and buffers.
 - b) A non-traversable median is preferred for major retrofits and on new locations.
 - c) Where applicable, a multi-use trail is preferable over bike lanes.
4. Prohibited Elements:
 - a) Parking lanes.

C1.0 – Minor Arterial

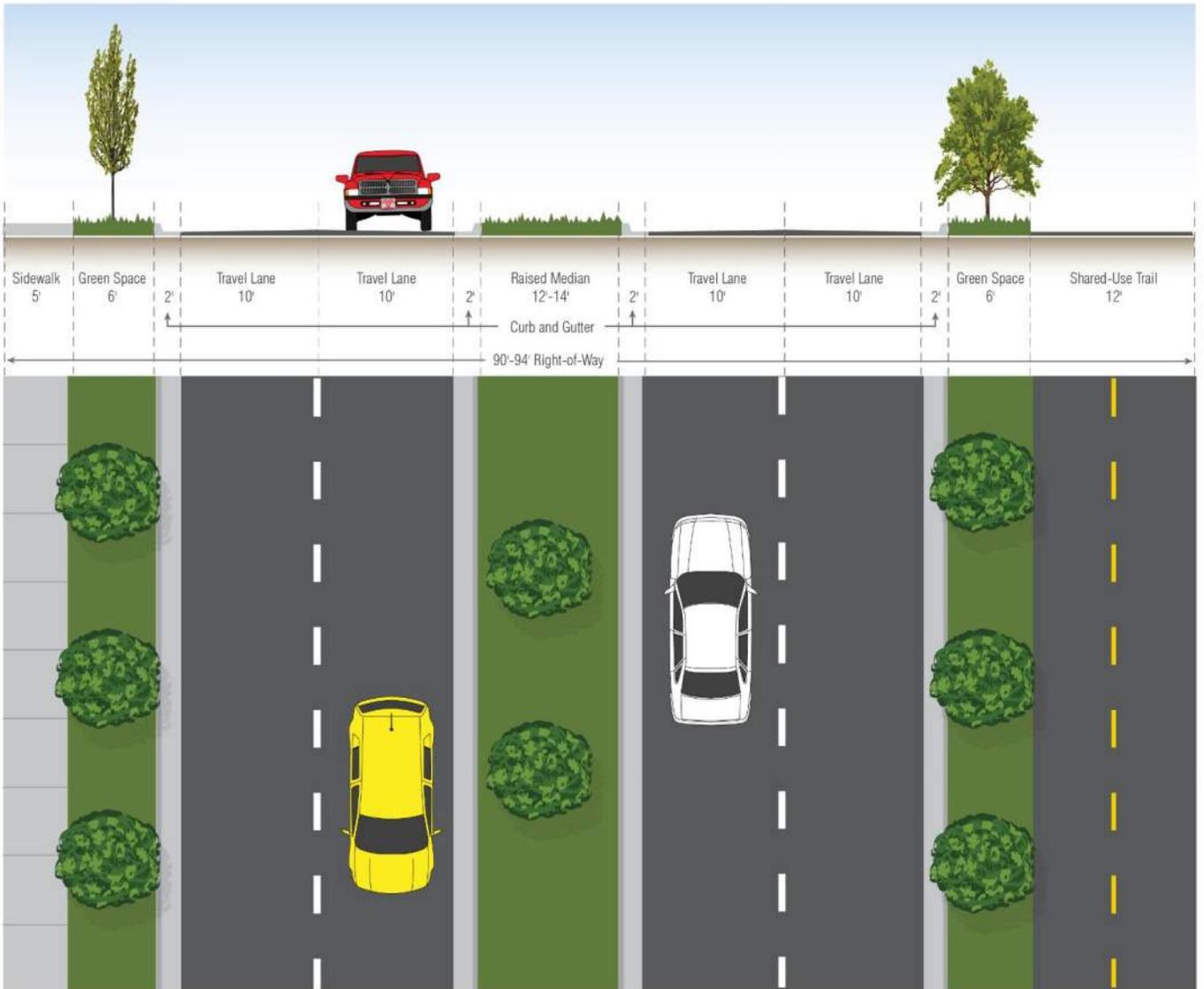


C1.1 – Minor Arterial with Median



C1.2I – Minor Arterial with Trail

Median optional



Collectors

Collector Roadways connect local traffic with the arterial roadway network and provide easy access to adjoining land.

1. Required Elements:

- a) Right-of-Way: All required design elements must be included in the cross-section and located on publicly owned R.O.W. Sidewalks or bikeways may be located on permanent dedicated easements.
- b) Curb and Gutter: Curb and gutter is required except in cases where terrain and/or forecast land use densities are compatible with an open shoulder design typically used in rural or exurban areas. The gutter width is not to be included in the travel lane.
- c) Sidewalks: Sidewalks are required on both sides of the roadway, except within Industrial Developments. Minimum sidewalk width is 5 ft. and must be compatible with the Americans with Disabilities Act.
- d) Green Space Buffers: A buffer is required between the back of curb and the sidewalk that is a minimum of 5 ft. However, no buffers are required in Central Business Districts or where on-street parking is used.
- e) Pedestrian Crossings: Safe pedestrian crossing provisions are required to be demonstrated by the proposing jurisdiction or agency where more than 50 ft. of pavement (including the gutter) have to be crossed by a pedestrian where pedestrian crossing is anticipated based on land use.
- f) Bike Lanes/Trails: If on a planned bikeway route, the bicycle element must be included and must adhere to the bicycle design standards shown on the appropriate cross section. Where bike lanes are provided a minimum buffer 1.5 ft. from the main travel lanes is required.
- g) Lane Width: 10 ft. minimum for main travel lanes or 11 ft. maximum lanes where the design speed and traffic mix warrant. There is a maximum of 2 travel lanes allowed.

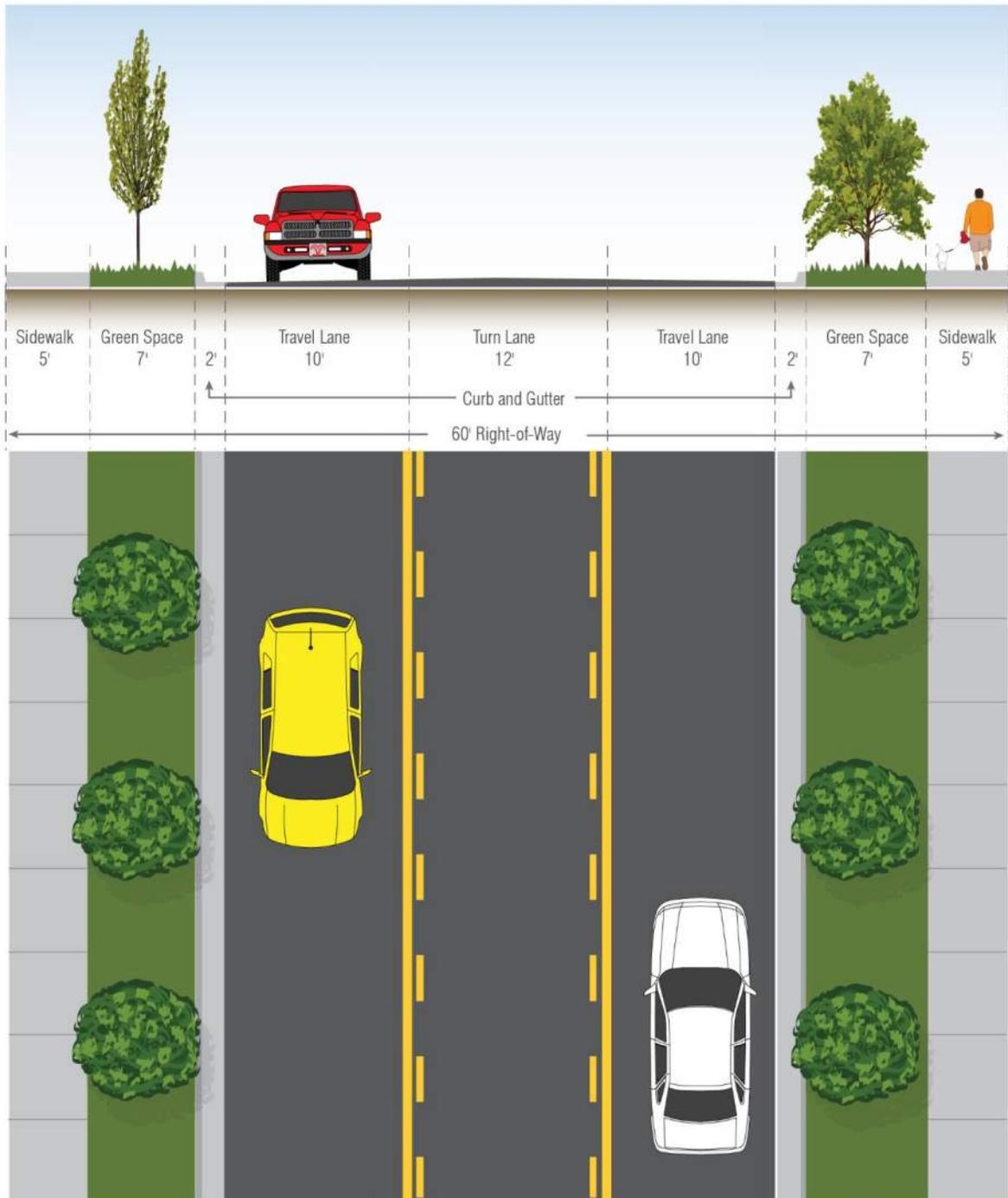
2. Optional Elements:

- a) Parallel parking may be used where warranted (C5.3, C5.4II).

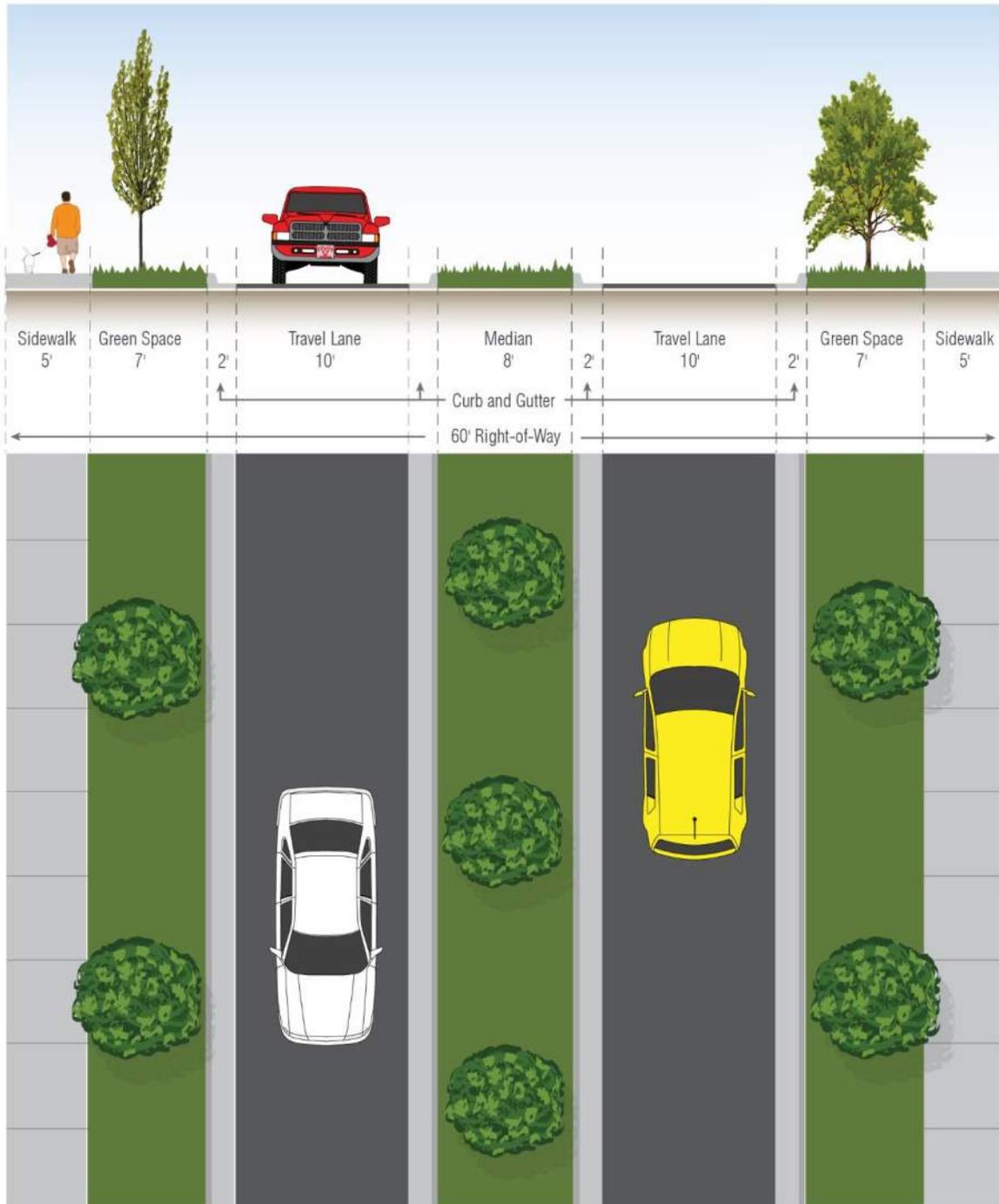
3. Preferred Elements:

- a) Landscaping of medians and buffers.
- b) A non-traversable median is preferred for major retrofits and on new locations.
- c) Where applicable, a multi-use trail is preferable over bike lanes.

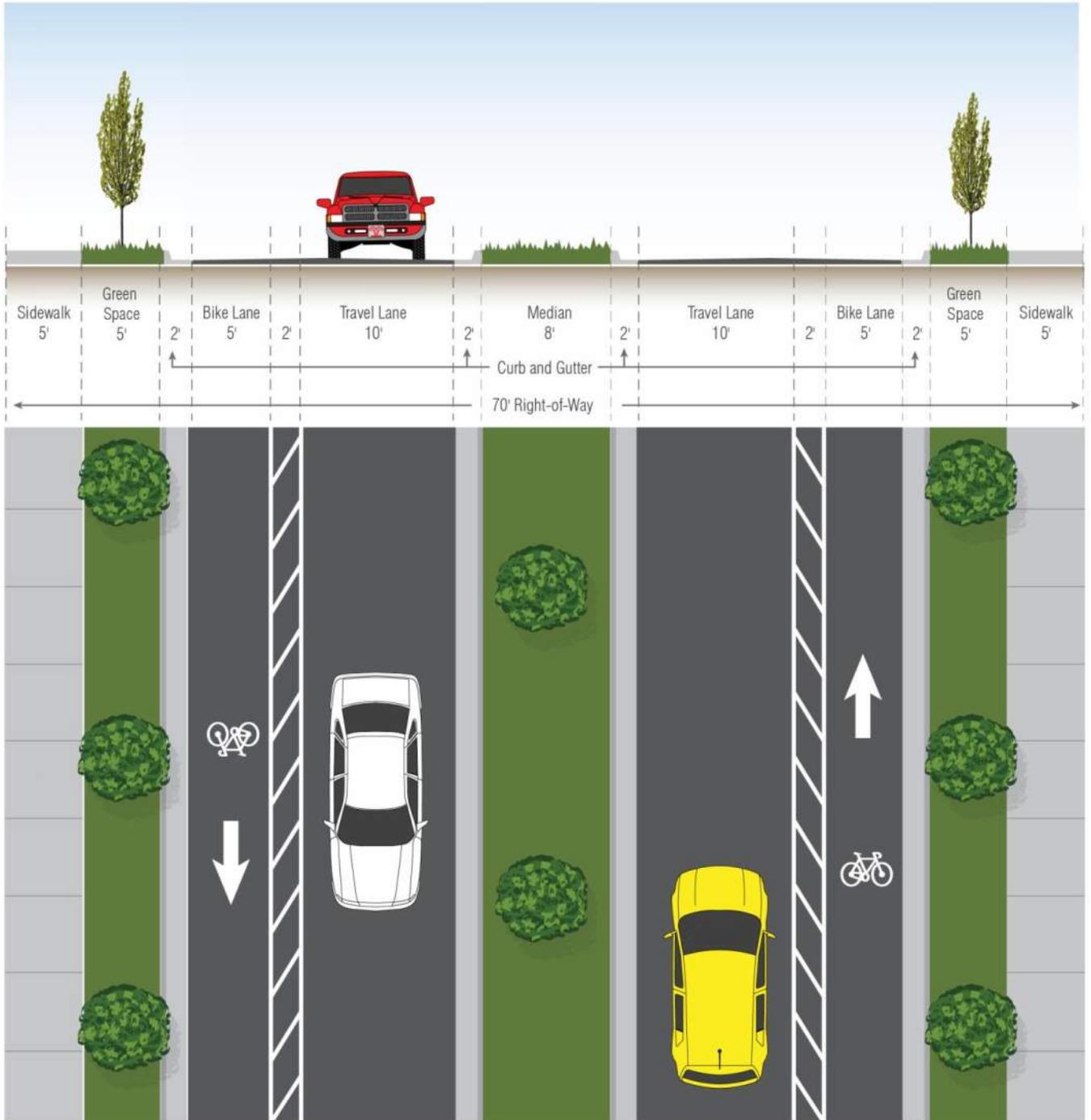
C2.0 – Collector



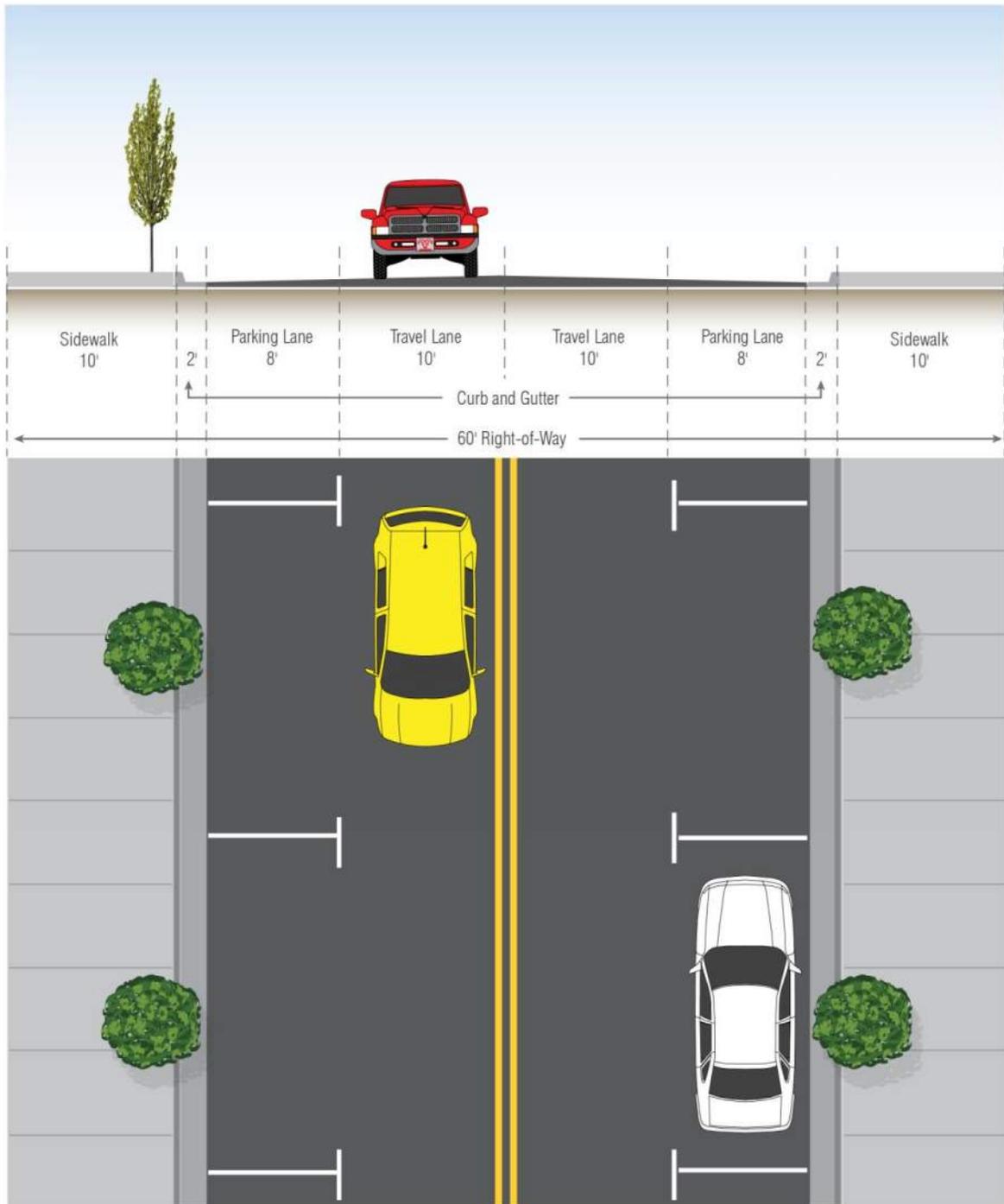
C2.1 – Collector with Median



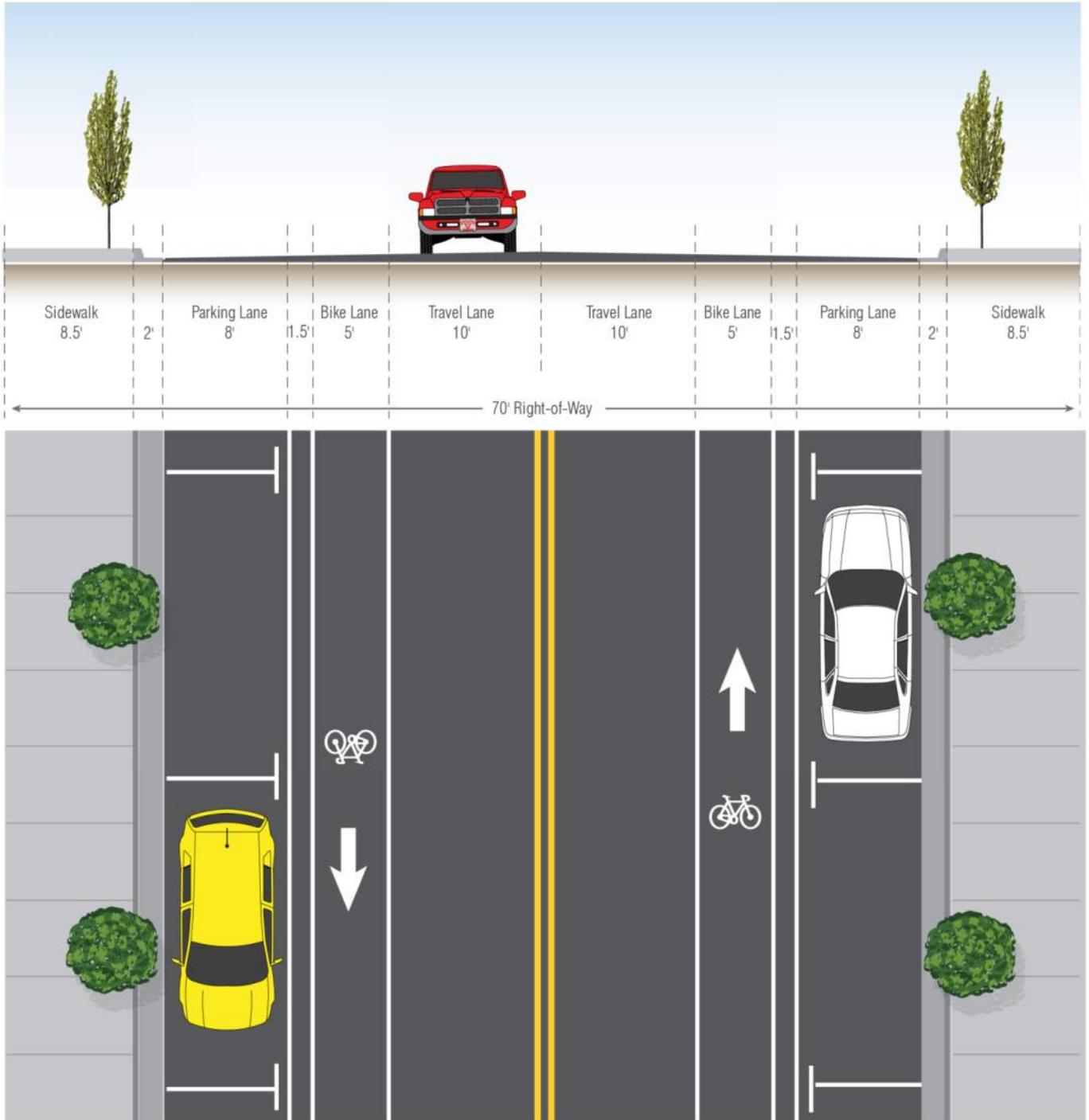
C2.2II – Collector with Bike Lanes



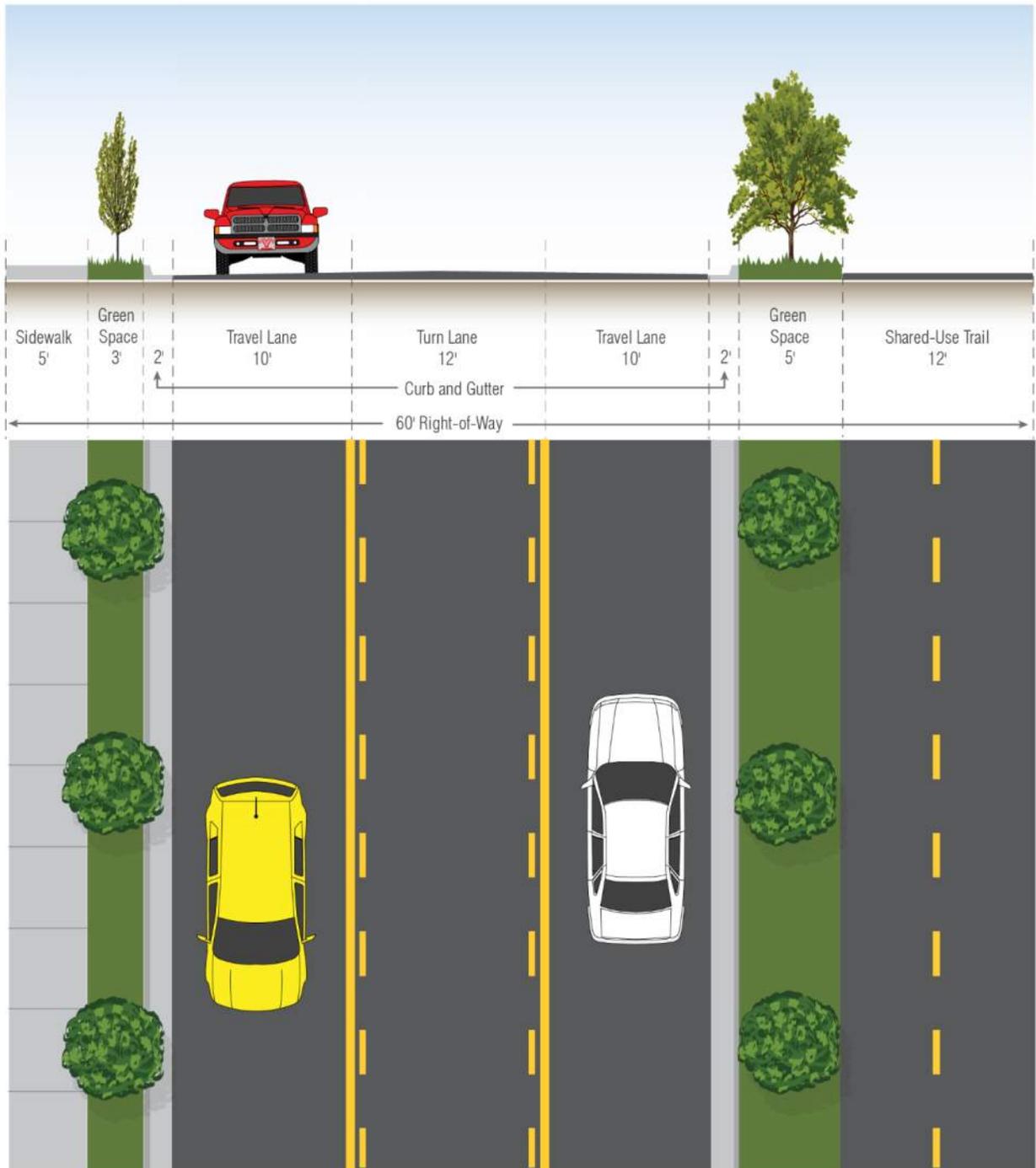
C2.3 – Urban Collector



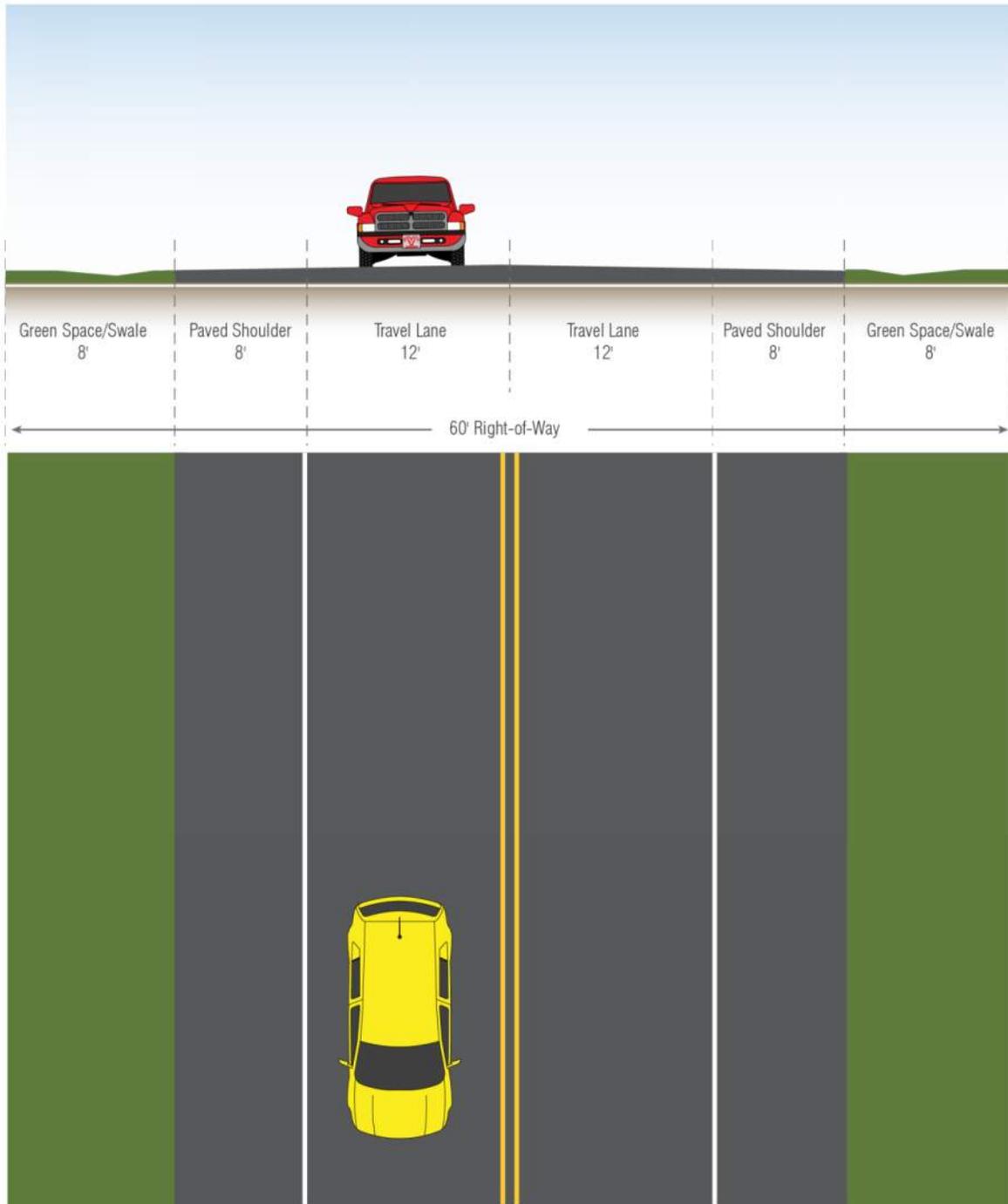
C2.4II – Urban Collector with Bike Lanes



C2.5I – Collector with Trail



C2.6 – Rural/Industrial Collector



Local Streets

Local streets are intended to connect traffic with collectors and to the arterial roadway network. They are not intended to carry large traffic loads, and are designed for low speeds, providing access to adjoining land.

1. Required Elements:

- a) Right-of-Way: All required design elements must be included in the cross-section and located on publicly owned R.O.W. Sidewalks or bikeways may be located on permanent dedicated easements.
- b) Curb and Gutter: Curb and gutter is required except in cases where terrain and/or forecast land use densities are compatible with an open shoulder design typically used in rural or exurban areas. The gutter width is not to be included in the travel lane.
- c) Sidewalks: Sidewalks are required on both sides of the roadway, except within Industrial Developments (C6.5III). Minimum sidewalk width is 5 ft. and must be compatible with the Americans with Disabilities Act.
- d) Green Space Buffers: A buffer is required between the back of curb and the sidewalk that is a minimum of 3 ft. However, no buffers are required in Central Business Districts.
- e) Bike Lanes/Trails: If on a planned bikeway route, the bicycle element must be included and must adhere to the bicycle design standards shown on the appropriate cross section.
- f) Lane Width: All lanes shall be used for driving and parking where the combined lanes are greater than 21 ft. in width.

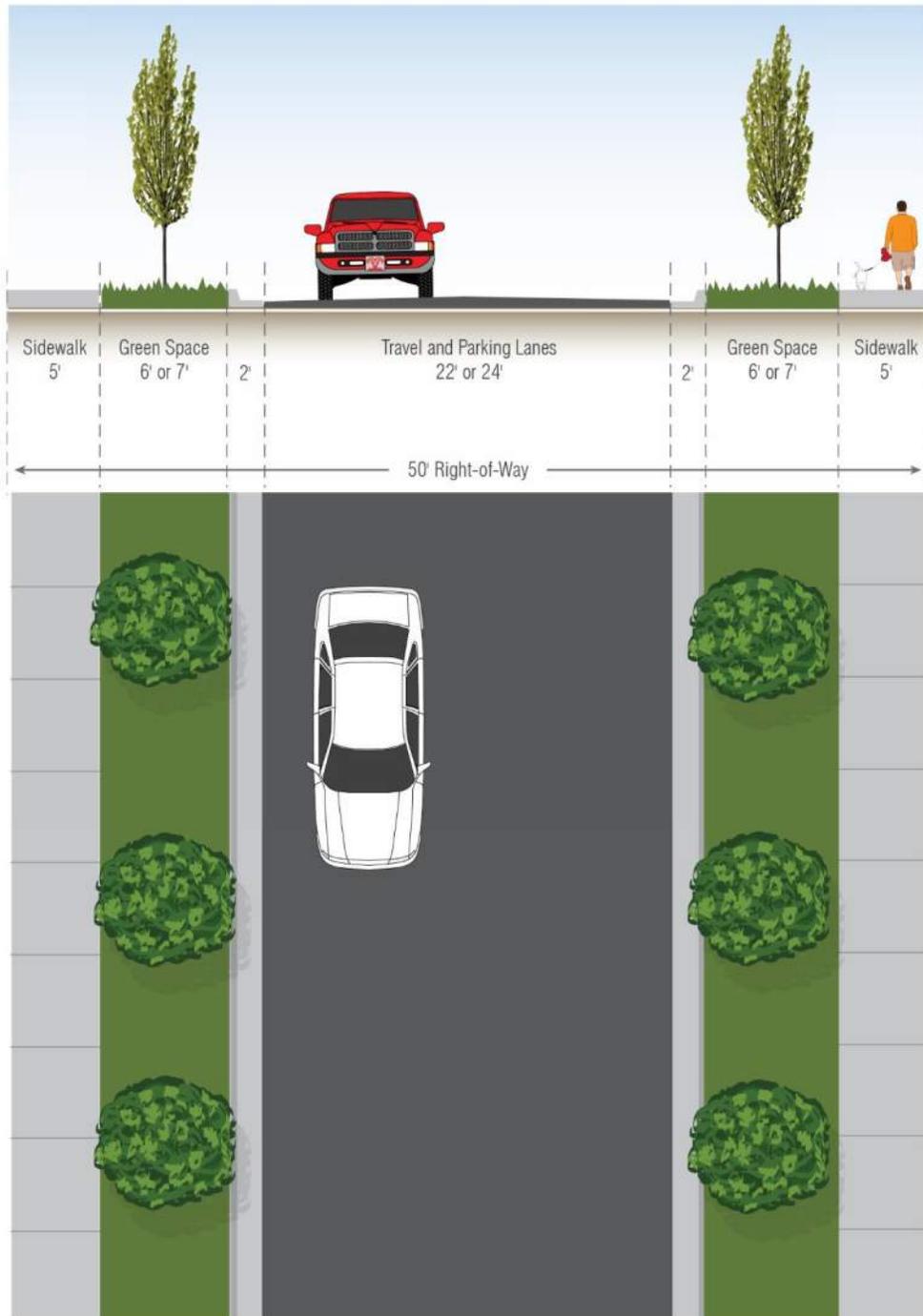
2. Optional Elements:

- a) Parallel parking may be used where warranted.

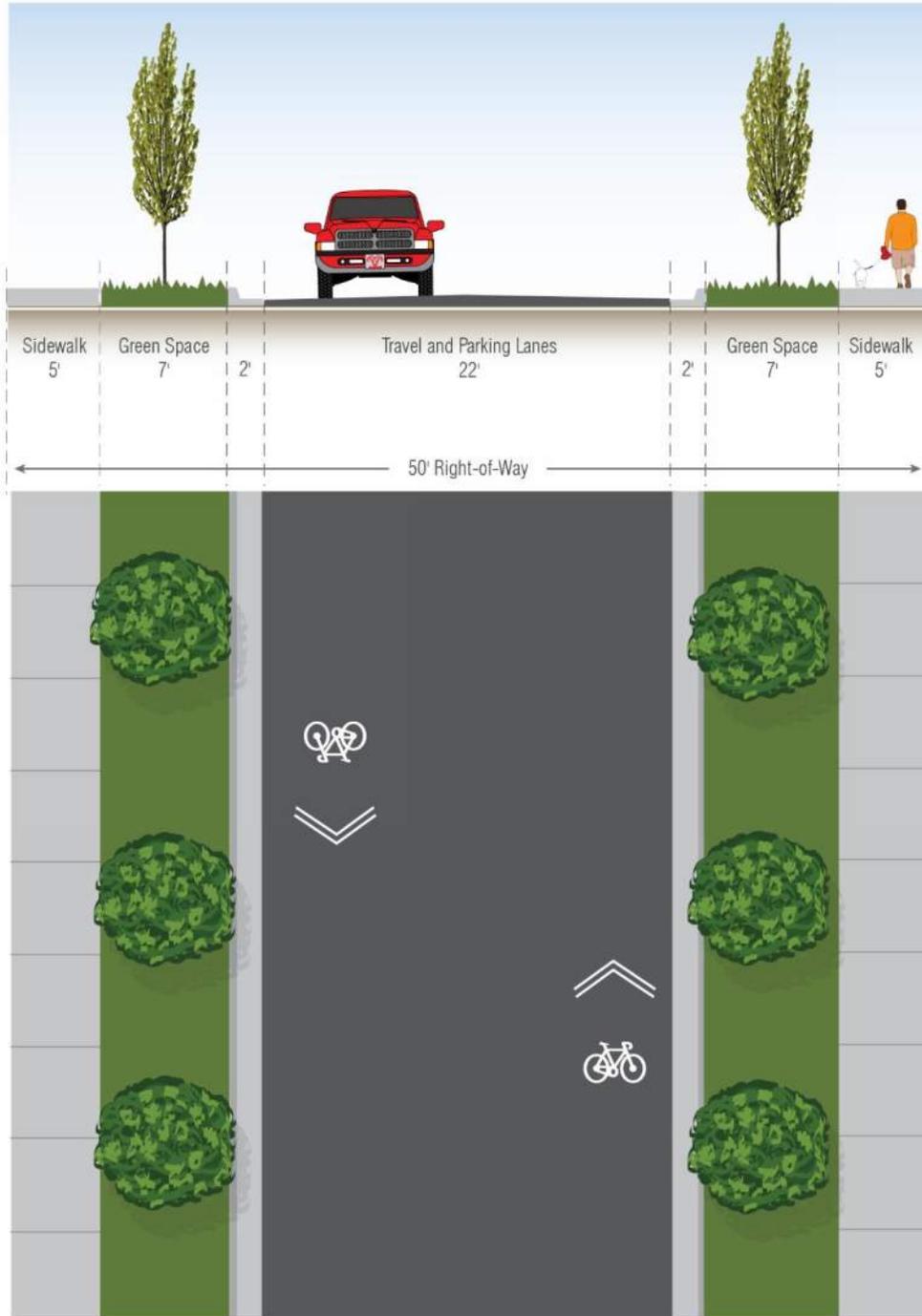
3. Preferred Elements:

- a) Where applicable, a multi-use trail is preferable over bike lanes.

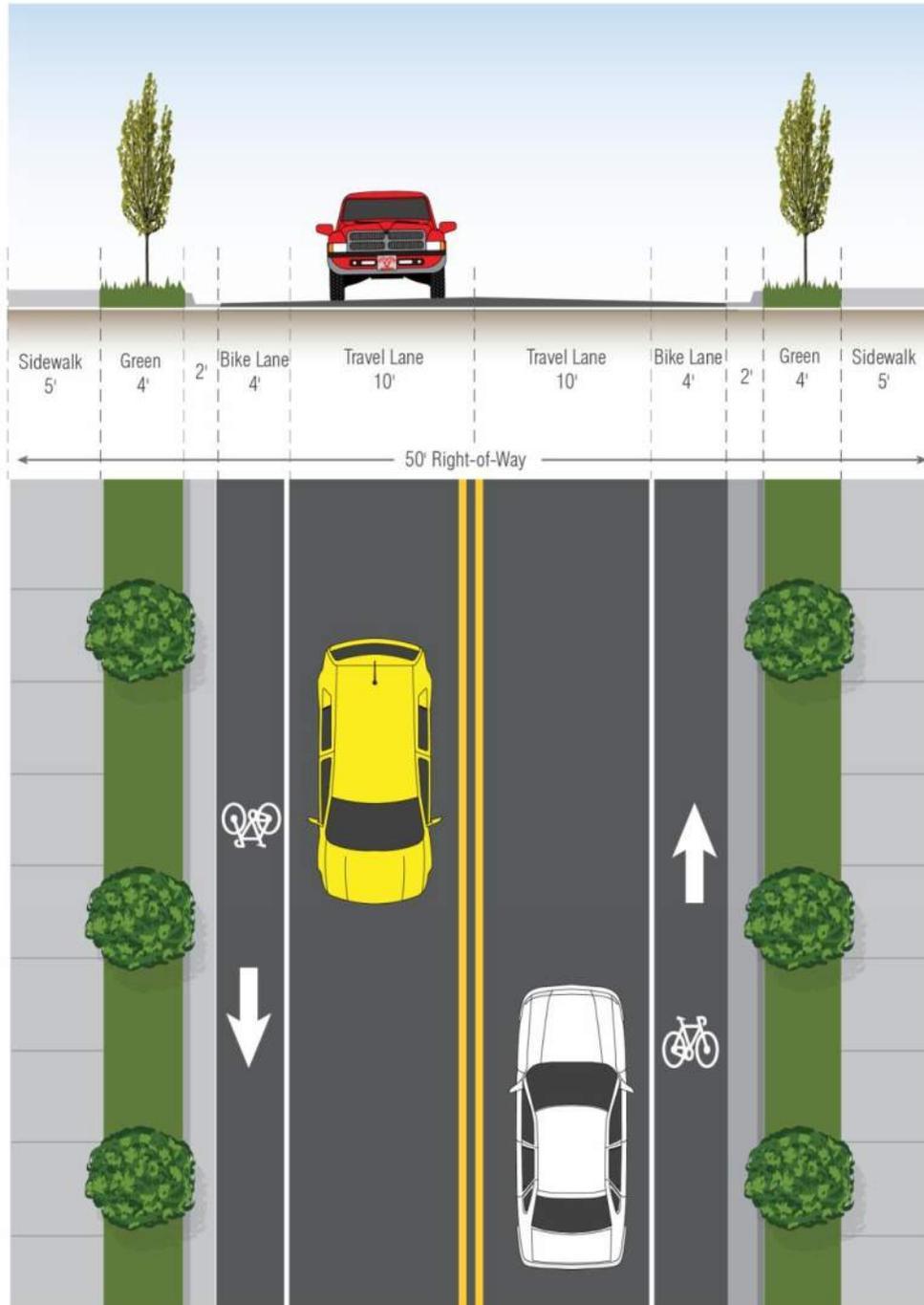
C3.0 – Local Street



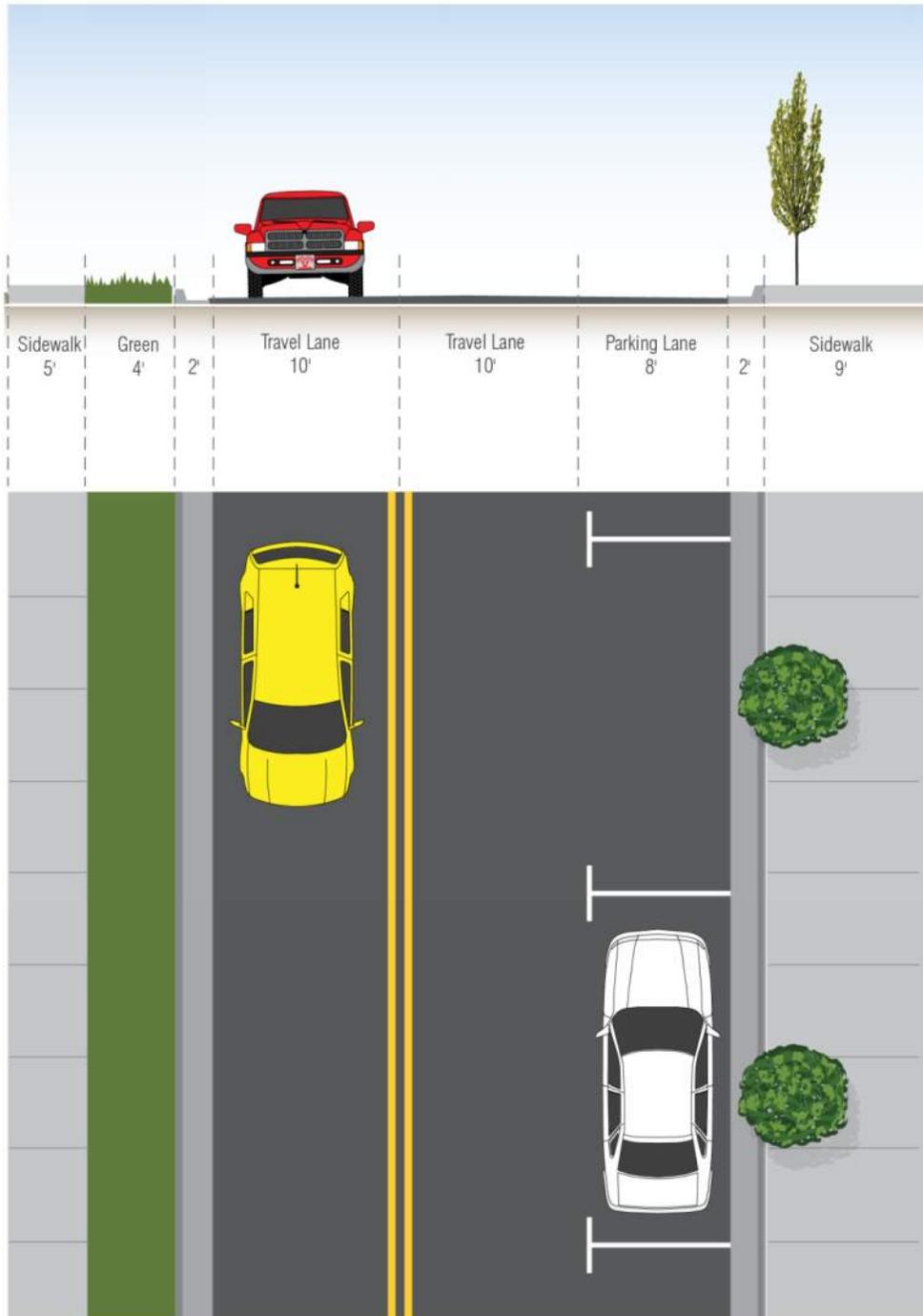
C3.1III – Local Street with Bike Route



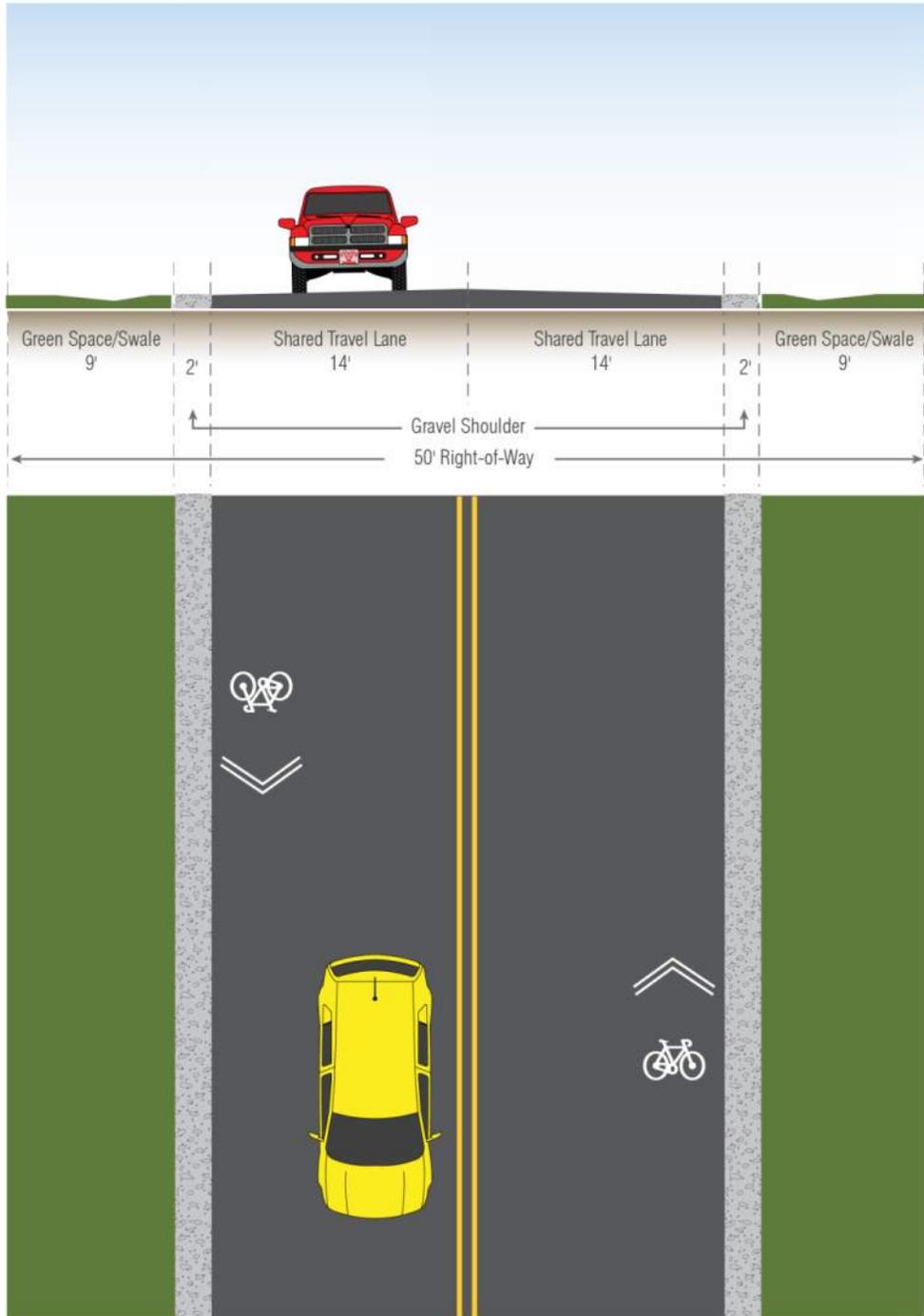
C3.2II – Local Street with Bike Lanes



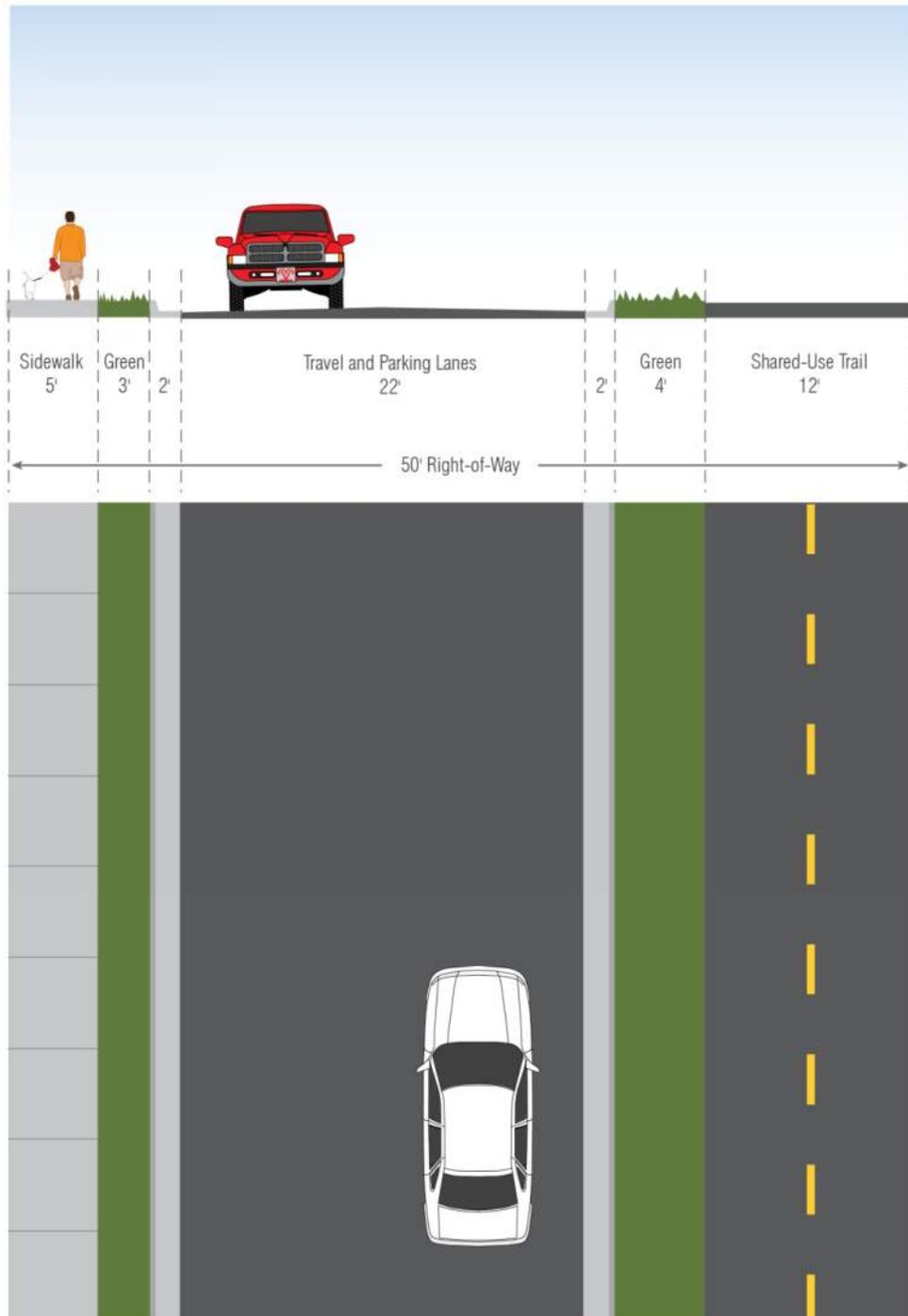
C3.3 – Local Street with Parking Lane



C3.4 – Rural Local Street



C3.5I – Local Street with Trail



Shared-Use Trails

The following cross section data is to be used only for shared-use trails which are constructed separate from a roadway. For shared-use trails constructed with a roadway see the appropriate cross section above.

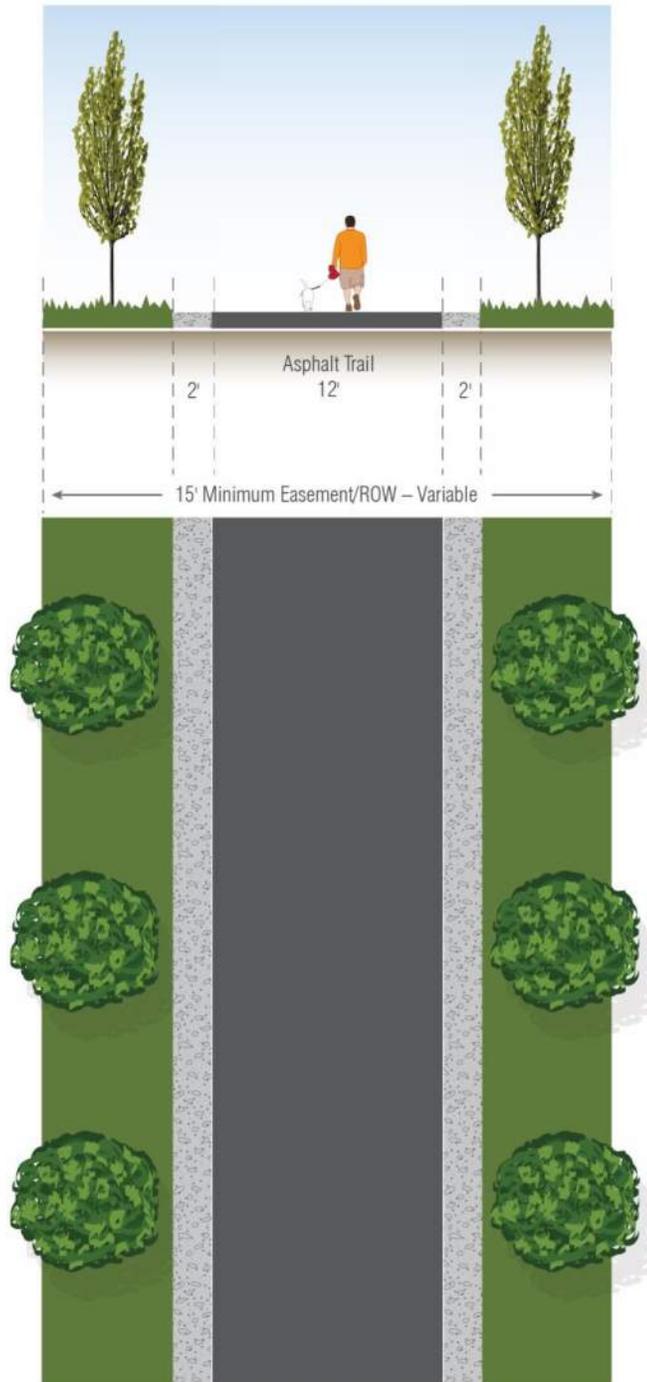
1. Required Elements:

- a) Right-of-Way/Easement: Share-Use Trails may be placed on a dedicated right-of-way or within a permanent dedicated easement. Easement/right-of-way should be adequate for trail and needed amenities. At least 20' is preferable.
- b) Paving Surface: Concrete, Asphalt, or Fine Compacted Aggregate
- c) Width: Minimum 8' width up to 16' in areas where heavy use warrants a wider trail. 10' Standard
- d) Curb/Shoulder: A suitable shoulder or curbing is required depending on the paving surface. Concrete – None, Asphalt – gravel or concrete, Fine Compacted Aggregate – Concrete or appropriate of edging containment

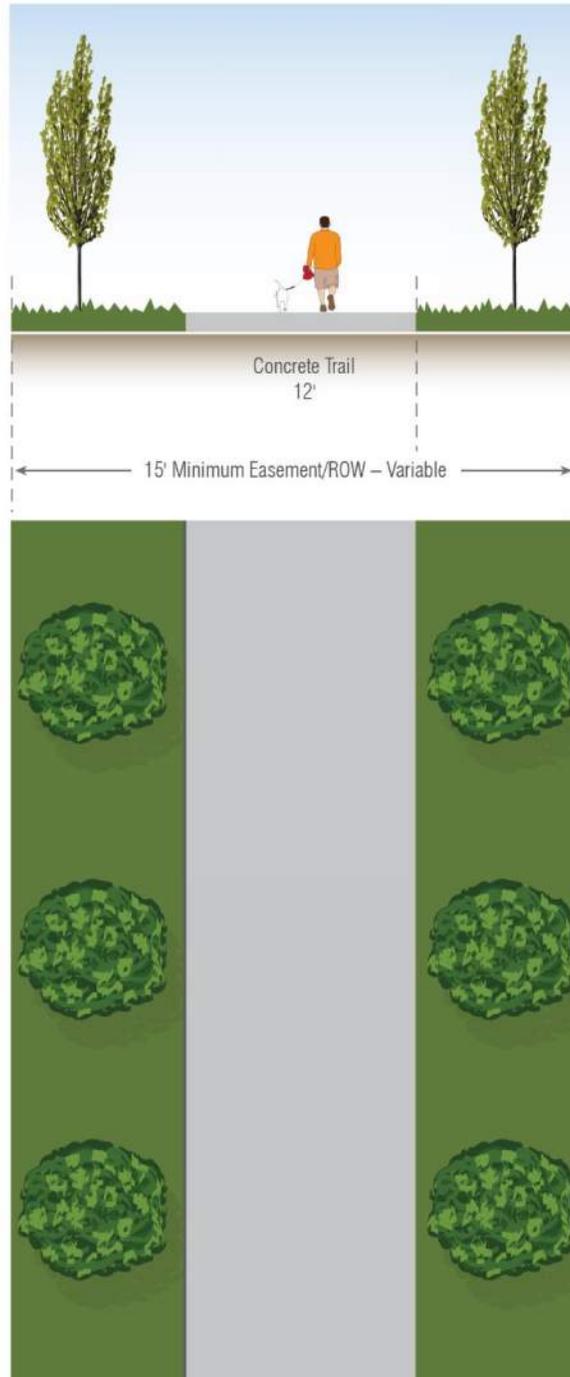
2. Optional/Preferred Amenities:

- a) Park Benches
- b) Public Art Installations
- c) Lighting – only where night use is encouraged such as parks.

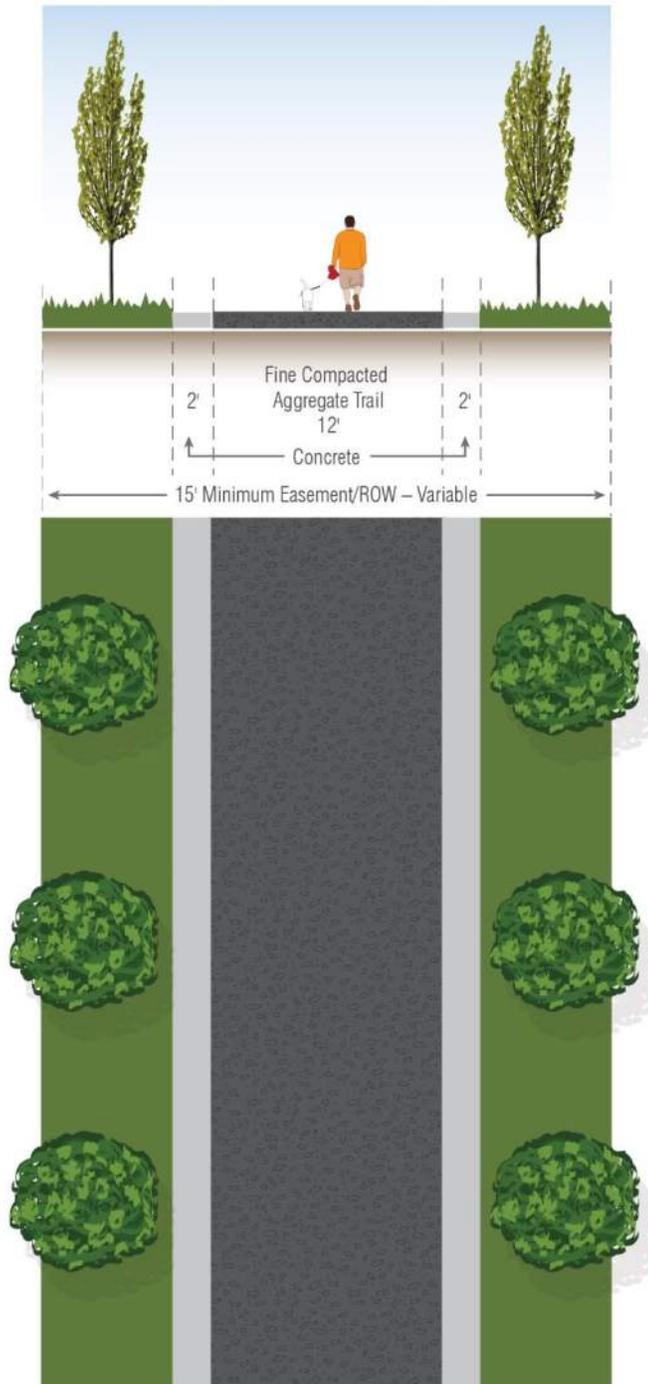
Class I – Shared-Use Trail (Asphalt)



Class I – Shared-Use Trail (Concrete)



Class I – Shared-Use Trail (Aggregate)



4.7: Annexation Strategy Plan

As cities grow, they are faced with a number of issues. Properties are purchased or developed for commercial, residential, or public use, and sooner or later the city is pushing its limits. Typically it is under these circumstances that a city will annex new land: when it is apparent that it is in the city's best economic interest to add more land to the city. Another assumption accompanying annexation is the natural increase in population density. As density increases, both transportation connectivity as well as diverse modes of transportation become more important. People need to be able to reach local amenities as restaurants, shops, and schools become located closer together.

Key Recommendation 4.7.1: Avoid pursuing annexation of new lands through city action.

After studying of Clarksville's existing land use, topography, and demographics, it is apparent annexation should be considered only as a fallback strategy, and generally avoided. The reasons for this conclusion are detailed below.

1. *A large stock of developable land* – Clarksville currently has a high stock of vacant property: that is, lots that do not have primary uses. Approximately 6,680 acres inside Clarksville's city limits is classified under the current Existing Land Use map as vacant. For comparison, only 4,478 acres within Clarksville currently have a land use. That means nearly 60% of all land within Clarksville's city limits is not being utilized, over half of the city's stock. While some of these properties are vacant because of the presence of flood plains and flood hazards, others are located close to existing neighborhoods or commercial developments that can be strategically utilized for development. As it stands, Clarksville is not short of land ripe for development, and it should seek to invest within its borders instead of expanding them.
2. *Low population density* – Clarksville has the lowest population density of any city with a population between 9,000 and 12,000 in the state of Arkansas. First, this means Clarksville has room to grow in its current city limits. This means the city must provide services to and maintain infrastructure for a large area without the benefit of having a large number of taxpayers to provide adequate support. This places a larger burden on Clarksville's taxpayers. Further diluting the city's tax base by adding land without increasing population will mean even higher burdens
3. *Development constraints* – Located in the heart of the Ozark Mountains, Clarksville benefits from being near to the Ozark National Forest as well as beautiful recreation amenities like camping and fishing. But in lush areas like this, terrain is not always inhabitable or developable. This is the case with Clarksville. Development constraints exist within the city's borders in the form of floodplain, but areas within the planning area boundary are filled with steep terrain in addition to floodplain. Focusing on each available acre for commercial, residential or community development will create a close-knit, interconnected Clarksville that effectively manages these constraining landscape factors. It would serve the city best to focus on utilizing and working around development constraints within the city as opposed to doing so within the planning area boundary.

Clarksville's population density is half that of many comparable communities. This places a heavy burden on taxpayers to finance each lineal foot of infrastructure.

Key Recommendation 4.7.2: Adopt a policy of subjecting voluntary annexation requests to a benefit analysis.

The city should carefully examine all annexation requests using cost-benefit analyses, and only accept those that may strategically benefit the city. These analyses should consider both those economic considerations that can be measured and political considerations that cannot be as easily measured. Such examinations should provide cost

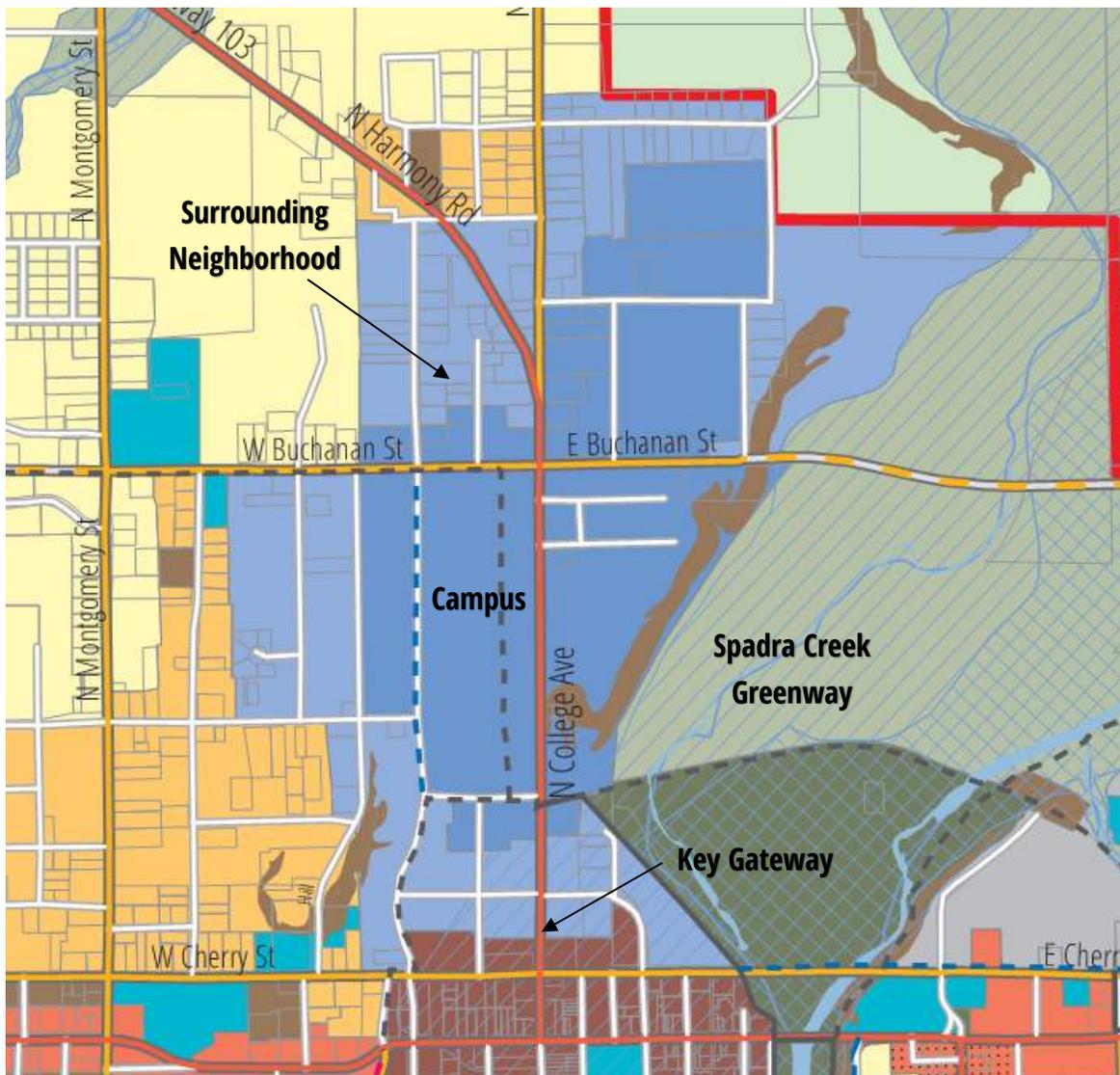
outlays for additional city service provision and/or potential sales tax revenue increases as well as acknowledge the long-term political ramifications for an annexation. Using these types of analyses would allow the city to see the impacts of annexation in a more transparent way.

There is already enough vacant land in Clarksville to accommodate all future growth in the next 20 years. The city has completed major annexations that greatly expanded its corporate limits. The annexed territory includes all of the city's major potential growth areas. The city's proactive step should relieve the city from having to worry about annexation for the foreseeable future.

4.8: University District Strategy Area

During the planning process, numerous controversial development proposals arose in the area surrounding the University of the Ozarks. The university is growing and in need of safe, attractive housing options for students. Additionally, the university is concerned about protecting the campus area to ensure the area conveys a positive image for recruiting students and faculty. Many parts of the neighborhood surrounding the university are dilapidated and run down with increasing incidents of crime being reported. Existing residents in area are also concerned about code enforcement and a lack of reinvestment (private development and city infrastructure) in the area. Many residents expressed strong concerns about the possibility of large multi-family developments moving into the neighborhood.

The planning team held a community charrette to see if a possible consensus vision could be developed that meet most needs of both the university and the surrounding neighborhood. The following recommendations are based on the concerns voiced in that meeting as well as community planning best practices.



College Hill Neighborhood

It is apparent the neighborhood does not have definable identity. This was well displayed in the charrette. Having an identity helps residents adopt and create a narrative about the community. Its also sets an area apart as distinct and unique with a special character. It is recommended the university neighborhood be branded as "College Hill". This reflects a name of one of the platted subdivisions in the area, and is an homage to university's location on a hill above downtown. To the right is an example of branding used for a similarly named district.



Built Environment

The neighborhood has a numerous homes and structures with historic value and character. This character is readily embraced has having value and being worth preservation. There was also a desire to ensure new development didn't harm this character. Many historic neighborhoods feature mixed density housing with single-family dwellings, accessory dwelling units, duplexes, and mansion style four-plexes. All these structures blend together to create a cohesive neighborhood with a strong sense of place.

Such neighborhoods do not typically feature large multi-family, such as garden apartments or lots with multiple multi-family structures. However, such neighborhoods can still feature a considerable density of structures and dwelling units without the having a character dominated by large structures. Part of the charrette featured a visual preference survey. This survey provided a series of photos with different housing types. Attendees rated each pictures based on how compatible they felt the structure would be within the neighborhood. Many of the more highly rated structures had historic character and were of high architectural quality. Below are examples.

It is recommended that a new zoning district be put in place that ensures new structures are of high architectural quality and standards. Such zoning would additionally permit small-scale duplexes and mansion style apartments by-right when built to meet these standards and allow increased allowance for accessory dwelling units.



Code Enforcement

Code enforcement was identified universally as an area of concern. A lack of code enforcement when blight is present can result in damage to community cohesion, depresses property, and can ultimately lead to increasing deferred maintenance on structures and eventual structural dilapidation. It is recommended that a targeted effort be put forward to proactively address code enforcement issues within the area over a 2-3 year period. Such action will send a message to property owners that code violations matter and the neighborhood is a high priority. The

message is likely to have a reverberating effect in other neighborhoods as property owners see that a social expectation for property maintenance exists.

Key Recommendations

- ❖ *Brand the neighborhood as the College Hill District.*
- ❖ *Increase code enforcements efforts through a targeted program over the next 2-3 years.*
- ❖ *Create a character area zoning district specific to the neighborhood that limits large-scale multi-family, while permitted small-scale multi-family of high quality design.*
- ❖ *Reinvest in the infrastructure in area to encourage walkability and bikeability.*
- ❖ *Consider creation of a College Hill National Historic Register District to enable access to tax credits income producing historic structures.*

FIVE: IMPLEMENTATION PLAN

5.1: Implementation Matrix

PROVIDED FOLLOWING COUNCIL PRESENTATION

APPENDICES

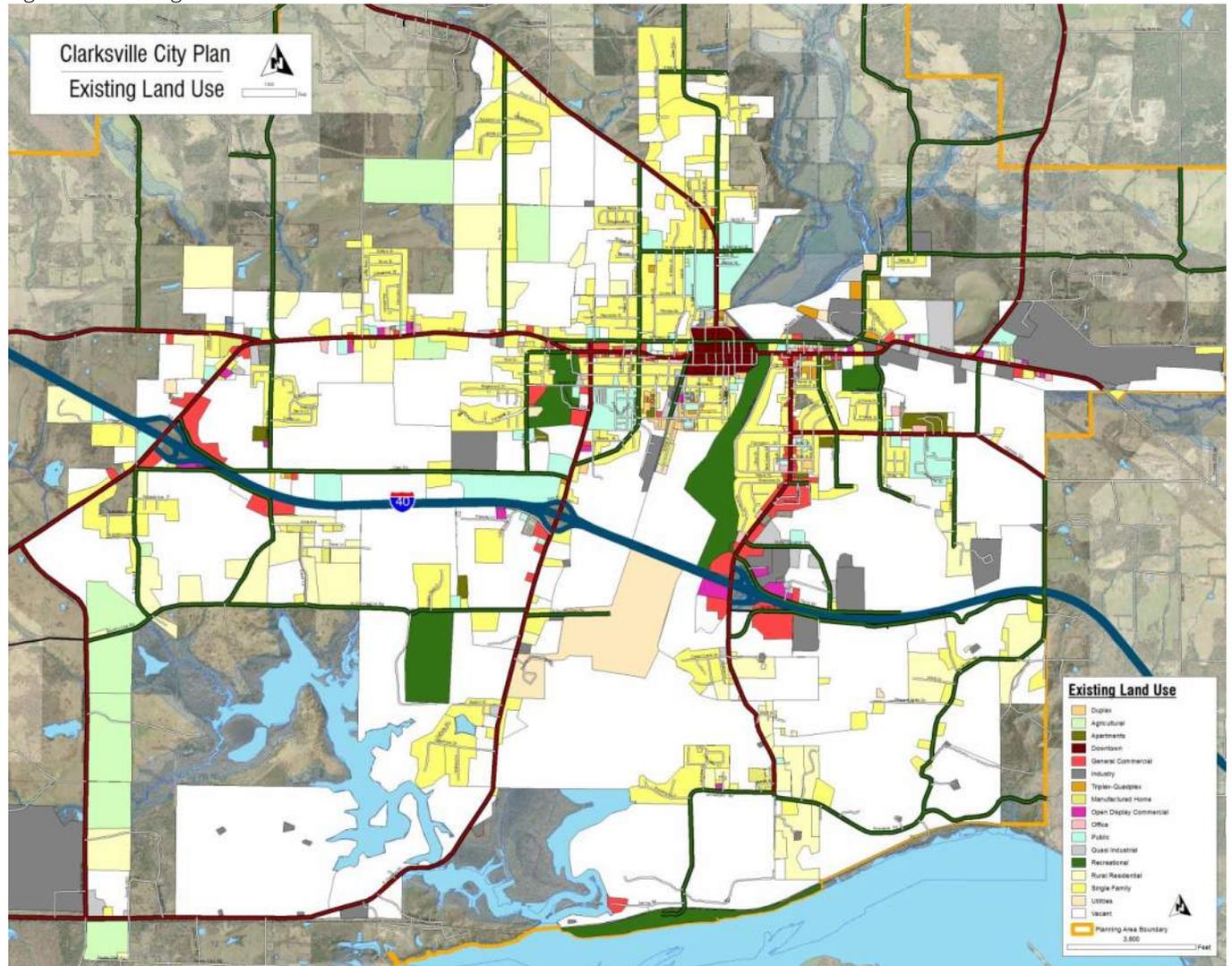
A.1: Maps and Graphs

Land Use and Place Types

Existing Land Use

The following map describes land uses of property in Clarksville as of mid-2016. This inventory of land uses will be used to help formulate the Community Character Survey within the Comprehensive Plan. A large version of the map is available.

Figure A.1 Existing Land Use





Rural Residential

Primarily single-family residential uses within a rural context characterized by large unplatted lots and limited availability of sewer service.



Single-Family

Single-family residential uses within a traditional context of a platted subdivision with small to medium sized lots and access to all city utilities.



Manufactured Homes

Manufactured homes (after 1976) and mobile homes (prior to 1976) within a variety of contexts. Areas are delineated from single-family due to efforts to ensure compliance with the Ark. Affordable Housing Accessibility Act of 2003.



Duplex

Two-family housing often found within a context of older neighborhoods as infill development, geographically scattered, or within a development intended solely for duplex development. Access to city utilities.



Triplex-Quadplex

Three and four-family housing found within a context of older neighborhoods as infill development, geographically scattered, or within a development intended solely for multi-family development. Access to city utilities.



Apartments

More than five units in a single structure or more than one structure on a lot. Often found as infill in older neighborhoods or as suburban greenfield development. Access to city utilities.



Downtown

Historic heart of the city characterized by a variety of commercial, public, and residential uses within one and two-story buildings. Built environment is oriented around the pedestrian. Access to city utilities.



General Commercial

Areas of commercial development encompassing a variety of contexts such as strip development or big-box stores. Business conducted inside building. Access to city utilities.



Open Display Commercial
 Areas of commercial development encompassing a variety of contexts. Defining characteristic is the display of merchandise outside the building. Access to city utilities.



Office
 Commercial areas that are employment centers or where services are provided on-site. Typically quiet uses including lawyers, doctors, engineers, businesses, etc. Access to city utilities.



Public
 Uses such as schools, hospitals, churches, or government offices. Large sites are typical with large buildings that can serve as major traffic generators. Also includes small-scale sites.



Recreational
 Areas devoted to parks, whether public or private, or some type of recreational use. Sites are typically large with few structures. May locate on steep terrains or within floodplains.



Agricultural
 Very large lot areas devoted to uses associated with the raising of crops, pasturage, or animal husbandry. May have access to city utilities.



Quasi-Industrial
 Areas of commercial use that are intensive with impacts that are similar to light industrial uses. Examples include auto repair shops, heating and air businesses, etc. Access to city utilities.



Industrial
 Either large-scale or small-scale areas devoted to industrial uses such as warehousing, fabrication, manufacturing, processing of raw materials, etc. Access to city utilities is typical.



Utilities
 Sites for public and/or private utility providers such as electric substations, utility yards, treatment plants, etc.



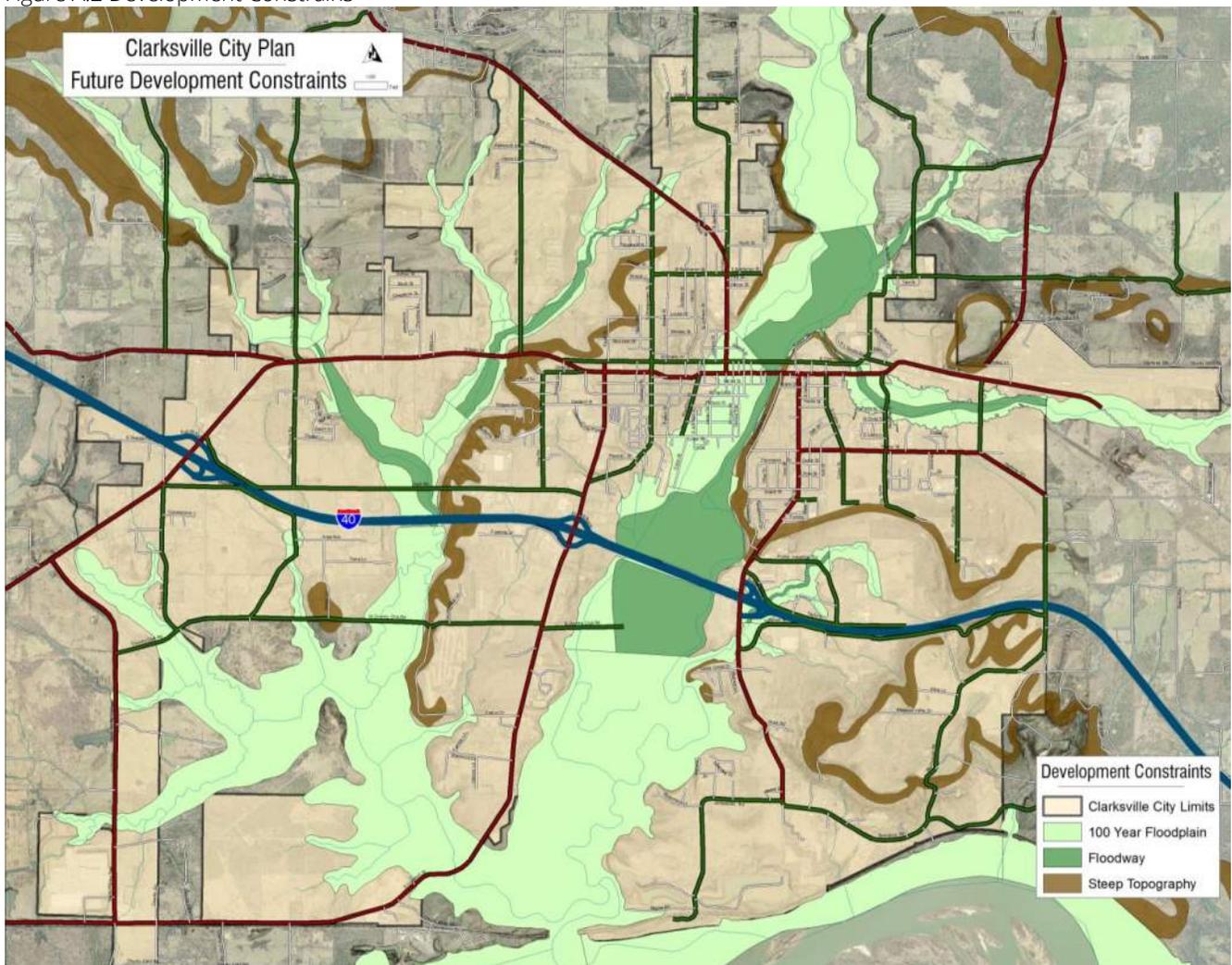
Vacant
 Areas within a suburban or urban context that do not appear to have any active uses on-site. Property may be cleared or wooded. City utilities may or may not be present.

Development Constraints Map

The map below shows important development constraints for the immediate areas surrounding Clarksville: steep topography, 100 year floodplains, and floodways. Clarksville has an unusual amount of restricting natural terrain within its city limits. As population increases, the city should be vigilant to properly zone residential areas in habitable, safe areas. While some land uses, primarily recreational and some agricultural, are conducive for floodplain types of terrain, the amount of uninhabitable land within Clarksville's city limits poses a unique challenge for future planning.

The large floodplain-floodway section running north and south through Clarksville is created by Spadra Creek. Currently there are several bike and pedestrian trails running adjacent to these undevelopable areas, but trails could be further expanded to enhance the city's quality of life. The steep hills between the eastern and western parts of Clarksville also pose a development issue, as it is expensive to pump sewer over steep terrain.

Figure A.2 Development Constrains



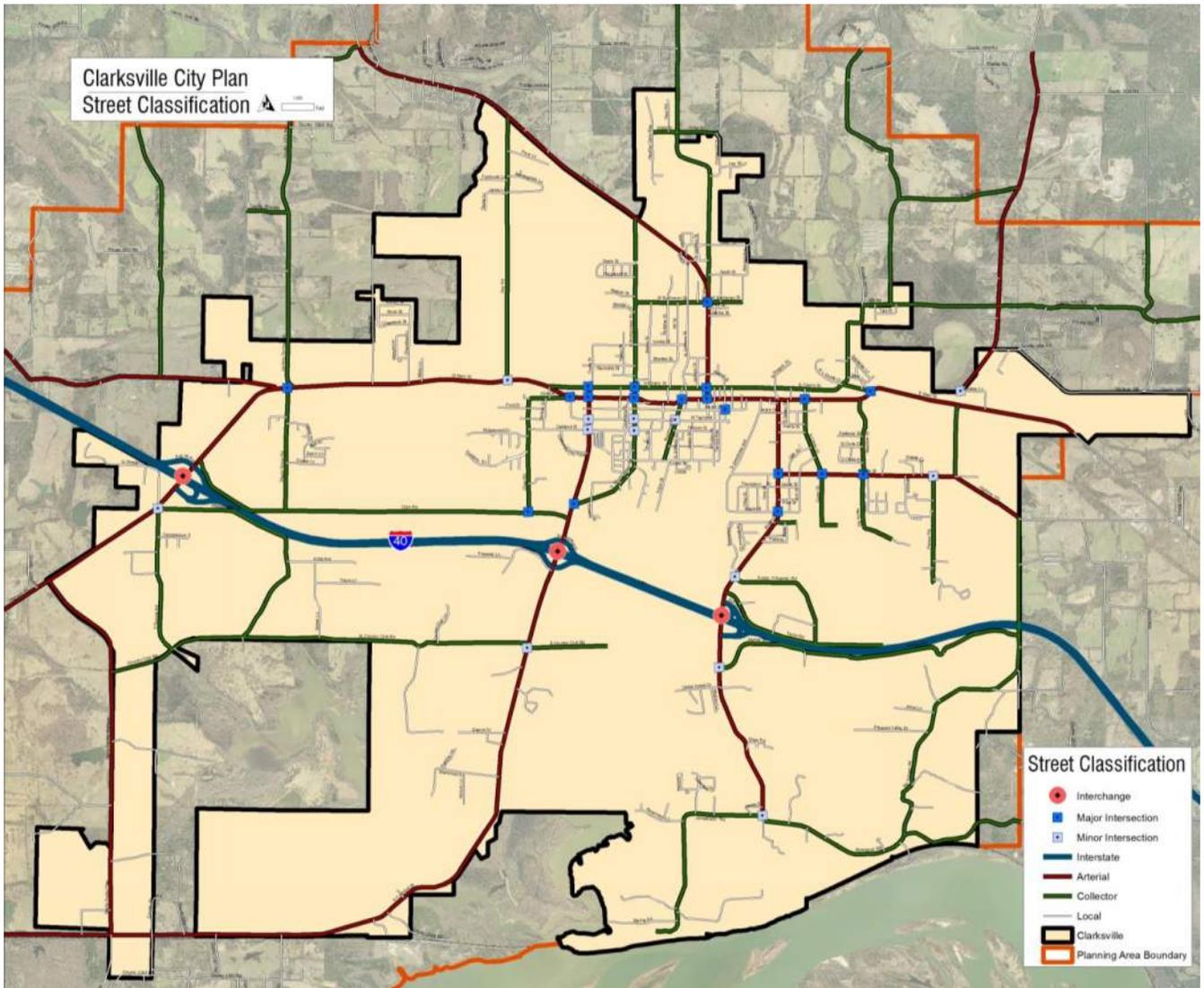
Transportation System

Street Classification

The map below depicts the city's current street classification. Clarksville benefits greatly by the presence of Interstate 40 bisecting from east to west and Highway 64 and State Highway 103 to the east, both running north and south.

The classification of streets seems to be appropriate. Traffic counts in Clarksville have remained consistent in the last fifteen years with the exception of South Rogers, which has seen a 3% increase in traffic. Given the various development constraints the city faces as well as the popularity of University of the Ozarks, the city should expect future growth between College Avenue and Ray Road in the north.

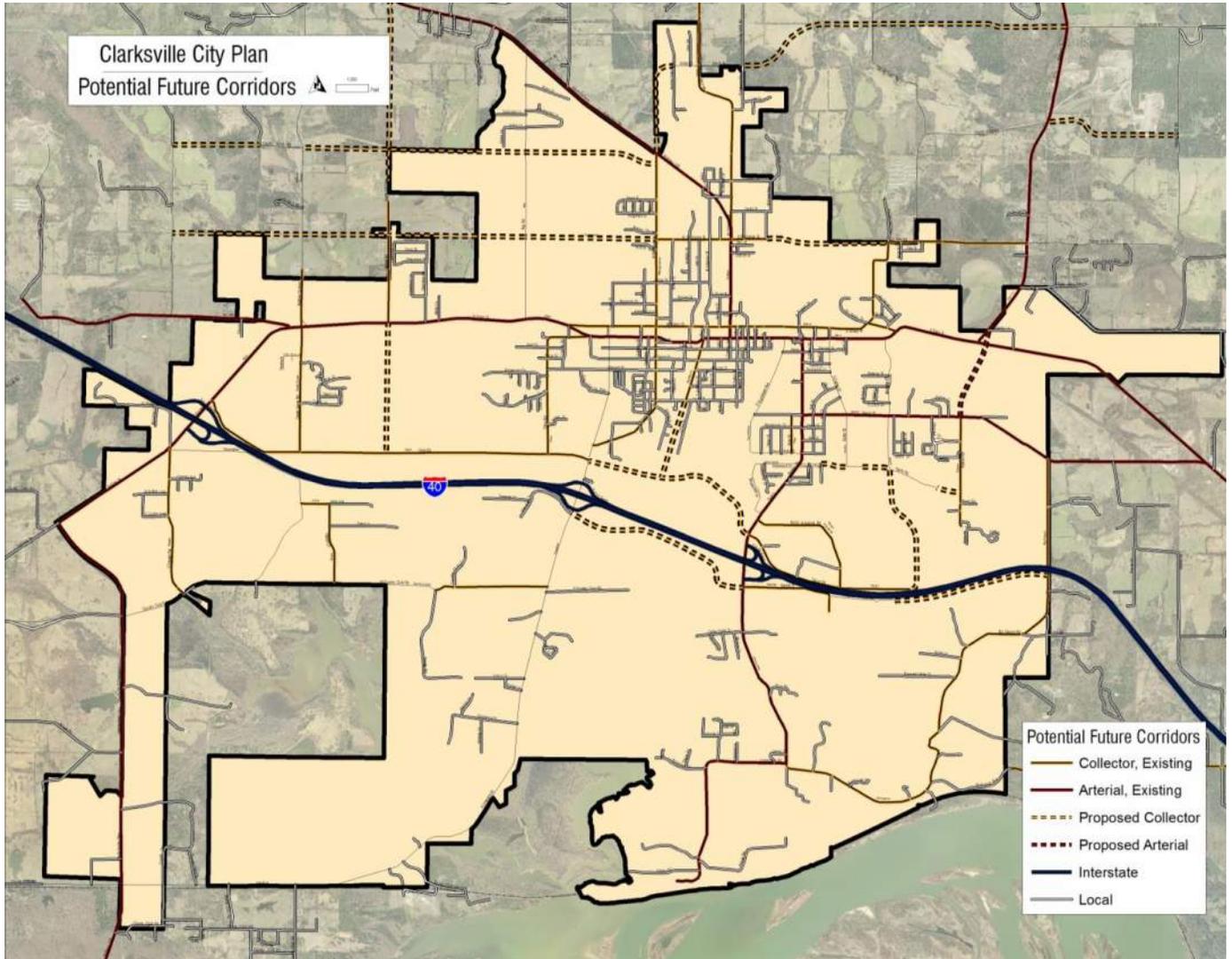
Figure A.3 Street Classification



Potential Future Streets

With steady traffic counts over the last fifteen years and a notable 34% increase in traffic along Interstate 40, constructing two connecting arterial corridors north and south of I-40 will create space suitable for Highway Commercial and Open Display Commercial land uses. The uniform grid that Clarksville has grown on can be suitably extended where necessary, provided that no development constraints prevent this. North of I-40, there are many opportunities to connect county roads to local arterials, increasing ease of traffic from northern towns like Oark and Hagarville. Constructing connecting arterials and collectors alike will foster and prepare for future growth.

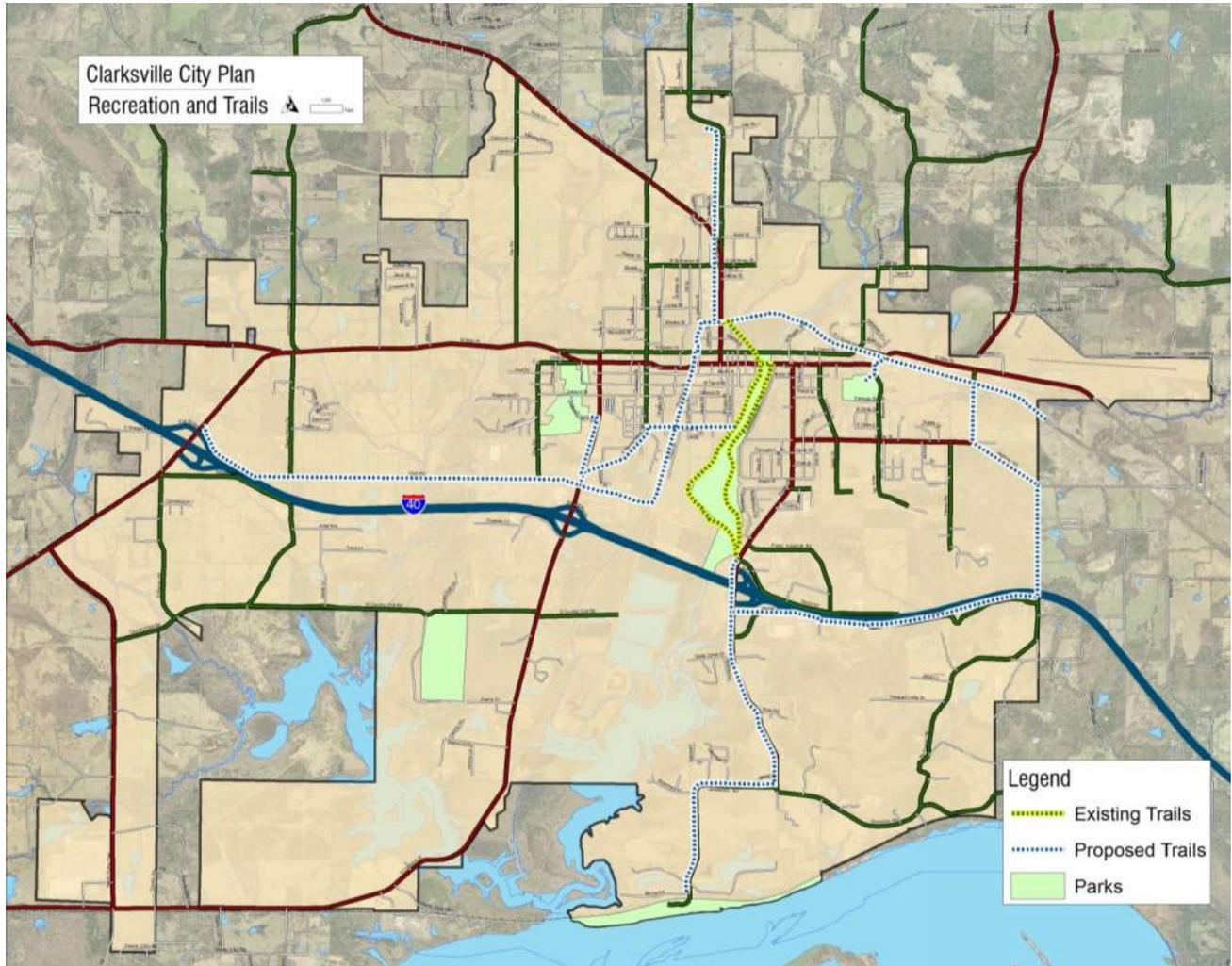
Figure A.4 Future Streets



Bike/Ped Mobility and Parks

Clarksville’s topography is filled with hills and potentially dangerous floodways. Fortunately, areas that are unfit for commercial, industrial, or residential development are often suitable for parks and recreation trails. This plan proposes the creation of several bike and pedestrian trails, branching off existing trails. If the proposed trails were created, it would mean a brand new mode of transportation, connecting residents in the southern areas of the city to those in the north.

Figure A.5 Bike and Pedestrian Plan



A.2 Community Outreach Summary

Kick-off Meetings Outreach

The following contain the issues and actions to be taken provided from the kick off meetings. The issues and recommendations range over a variety of topics; however, a few key themes emerged.

Transportation – Transportation was identified as a key issue within the kick-off meetings. The circulatory system for traffic in Clarksville needs additional capacity along corridors that move trips from east to west. Specifically, between Rogers’s Street and South Crawford Street. Improving East West traffic flows in the city is an important issue that should be taken into consideration for the new comprehensive plan. Additionally, the groups highlighted the city’s location on I-40 and proximity to Fort Smith and Fayetteville as assets. Transportation will remain one of the key focuses of the plan in order to enhance pedestrian and vehicular mobility.

Quality of Life/Recreation – Quality of Life/Recreation was brought up in many of the comments from the kick-off meetings. Building on the success of recreation and quality of life improvements that have occurred in recent years citizens want to see an expansion of the trail system, more investment downtown, improvements to community gateways, and continued focus on creating a more walkable and bikeable community. Because of continued community interest, it is certain addressing quality of life will be an important component of this plan.

Economic Development – Economic development was identified as a key issue within the groups at the kick-off meetings. The groups suggested that economic development policies should target the workforce; specifically, policies for middle income jobs and housing initiatives to enhance the city’s tax base. Furthermore, the groups identified the University of the Ozarks as a key hub for economic development. The stakeholders want to see city policy that slows brain drain by increasing the number of college students who stay in Clarksville after graduating from the University. These needs, and others, should be addressed through the comprehensive plan.

City Council and Planning Commission

Questions:

1. Identify 5 issues/concerns facing Clarksville
2. List, in order of importance, the 3 most important issues discussed thus far.
3. Identify 3 specific projects/actions that you would like to see undertaken within Clarksville

Issues Ranked by Importance:

- I. Job market: Lack of jobs resulting in brain drain. Missing middle income population between 35-60\$k (4)
- II. Traffic: Issues with traffic moving from east to west in the central section of the city. Specifically, moving traffic between the Rogers Street and South Crawford Street. (3)
- III. Aging population. Entertainment for singles is lacking. (3)

Other:

- Inconsistent code enforcement (2)
 - Retail/Restaurant Leakage (2)
 - Lack middle income housing development/residential development occurring outside city (2)
 - More active downtown (2)
 - Recreational opportunities: Entertainment for teenagers (1)
-

- Lack of safe mobility (sidewalks, bike/ped) (1)
- Limited entrepreneurial investment (Banks) (1)
- Community gateway appearance (1)
- Declining property values... Blight
- Dry County
- Hospital in financial trouble
- School district budgeting/millage
- Need parking lots downtown.

Actions to Take:

- Fulltime *effective* code enforcement (help increase property values)
- Attract development for middle and upper income jobs
- New East – West traffic corridors and new trails
- Restructure downtown parking: add sidewalks and bike lanes
- Expand and improve trail system
- Expand traffic flow with additional east-west and north-south roads
- Free Wi-Fi
- Clean energy
- Summer and evening activities for kids and teens
- Job creation options
- Purchase property downtown for development/parking
- Sidewalks and trails linking entire city
- Create a stronger school system
- Public restrooms downtown

Steering Committee

Questions:

1. *Identify 5 issues/concerns facing Clarksville*
2. *List, in order of importance, the 3 most important issues discussed thus far.*
3. *Identify 3 specific projects/actions that you would like to see undertaken within Clarksville*

Issues Ranked by Importance:

- I. Job Market: Need more higher paying jobs (7)
- II. New high school (5)
- III. Clarksville's location: proximity to Fayetteville and LR (5)

Other:

- No cohesive community vision (3)
- Downtown/Community Growth (property owner won't sell) (1)
- Trail expansion (1)
- Lack of middle/high income housing (live out of town/in the county) (1)
- Cultural diversity (1)
- Downtown floodplain issues (1)
- Lack of residential development (1)
- Drugs- social criminal economic impact (1)
- School traffic
- More safe shelters in schools
- College graduate retention (brain drain) high school and University of the Ozarks
- Improved soccer and baseball facilities
- Property value deterioration (blight/floodplain issues)
- Nice restaurants
- Lack of entertainment
- Branding of the city to attract visitors
- Under-employment: talent employed below skill level
- Expand Marvin Vision Center (more amenities)
- Basic skilled labor shortage
- Perception of development difficulties
- Lack of historic preservation
- Police shortage
- Lack of public private partnership

Actions to Take:

- Encourage home ownership in city
- Incentives for developing downtown that offset costs of building in the floodplain
- City marketing plan (A&P Commission)
- Road from Primary school on Clark to Hudson Springs on Highway 103
- Softball and soccer complex
- New high school with "everything"
- Construction of a road that creates new commercial areas
- Road and bridge to connect Clark road to Rogers
- Road to connect Highway 103 to Highway 21 north of College
- North-South Road west of Ray Road to connect Highway 103 and Highway 64
- Beautify 3 interstate exit areas
 - Remove sexually oriented business store signage
 - Develop along interstate on access roads
- Beautify and develop vibrant downtown district with attractions that draw in traffic
- Leverage broadband (C&W) Capacity to land 500* I.T. Jobs @ industrial site
- Develop the river front
- Innovation hub
- Diversify education at high school level and beyond (vocational options)
- Provide facilities for people who are abusing drugs and alcohol

- Expansion of the community amenities: Marvin Vision Center, Fields, Trails
- Curb appeal from interstate to downtown

Community Workshop Outreach

Using maps and stickers participants used labels to explain features of Clarksville that should be preserved, enhanced, or transformed.

- *Preserve* – Areas or features that are major assets to the city of Clarksville today and possible drivers that will help sustain the city into the future.
- *Enhance* – Areas or features that could become major assets to the city, but need to be invested in in order for this to happen.
- *Transform* – Areas or features that pose a threat to Clarksville’s development. These are issues that could stagnate growth or cause specific parts of the city to become blighted.

Community Response:

1. *Preserve*

- University of the Ozarks should be preserved as a major driver within the community.*
- Existing trails need to be preserved.*
- The industrial park needs to be maintained and additional operations should be recruited.*
- Fiber optic internet service run by the utility company. Maintain and leverage as a community asset.*

2. *Enhance*

- Downtown should be improved in order to become a driver of city growth.*
- Land near Wal-Mart super center should be developed to create larger consumer draw.*
- Soccer fields by the airport need to be enhanced. Lighting needs to be addressed.*
- The entrance to the marina needs to be improved. The way the community brands itself with outdoor recreation needs to be improved.*
- Highway 64 “entrance ways” into the community need to receive beautification treatment.*
- Improve Marvin Vincent Center.*
- Soccer fields could be developed to the west of the new high school.*
- New trails need to be built and a larger network should provide transportation and recreational opportunities to the whole community.*
- Trailhead behind Mc Donald’s needs to be enhanced with better lighting.*
- Downtown needs to have a public restroom.*
- University and Downtown should be grown towards each other.*
- The city should embrace its regional branding opportunity of being in “The River Valley.”*
- Diversify housing options downtown. Encourage mixed use development with dwelling units above other functions. Allow balconies on upper floor dwellings.*
- Brand the city as being a good place to retire. Capture value of aging wealth.*
- Connect the country club with Roger Road.*
- Expand the aquatic park and consider moving the fairgrounds further out of the city center.*
- Encourage congregating downtown. Provide vibrant public spaces.*
- Improve the city by creating a “lookout” spot where people can see the lake or the sunset.*

3. *Transform*

- a. Clark Road needs to be widened in order to improve traffic flow. Also, Clark Road needs sidewalks.
- b. Spadra Park needs to be revamped and a playground needs to be added.
- c. Code enforcement needs to fulfill its role downtown in order to make the downtown attractive.
- d. Flood insurance downtown needs to be further investigated. The possibility of improving the levee needs to be addressed.
- e. Young people need to have a reason to stay in Clarksville long term.
- f. West end of town needs to have code enforced. Looks very run down.
- g. The city should pursue a more even distribution of goods and services within city limits to improve quality of life.
- h. Increase interaction between the U of O and public education in Clarksville.

Stakeholder Groups and Key Person Outreach

Individual and group interviews were conducted in order to delineate what Clarksville's issues and assets are with some recommendations for how the city should address them.

Issues:

- Some issues with downtown buildings being vacant.
- Clark Road is congested in the afternoon.
- No pre-K program.
- Need more restaurant options.
- The soccer complex needs to be improved.
- Floodplain is a big issue for downtown, which is a big disincentive for investment.
- Gateway to the university needs to be improved. It is an issue in regards to quality of life and recruiting.
- Poorly maintained buildings on East Main need to be addressed.
- Gateways into town need to be a priority.
- Parking downtown needs to be managed.
- Code enforcement needs to be strictly regulated downtown to protect future and current investment.
- University growth is hemmed in.
- Property prices increase when innovative projects are suggested.
- University needs more housing. The market would benefit from additional multi-family options.
- There is a need for more market rate rental properties.
- Downtown would benefit from operations that sell alcohol.
- There should be nice places to sit outside in the downtown.
- Need a connected system of bike lanes.
- Need to connect all parks with a system of greenways.
- Clarksville needs a youth sporting complex.
- The area needs to work to attract a middle class.
- There needs to be an urgent care clinic.
- City needs to build out fiber cables to the hospital.
- The hospital needs sidewalks around it to increase accessibility.
- Need a larger baseball tournament in order to host tournaments.
- Need more family practice doctors.
- Elderly population has a housing shortage.
- Need sidewalks around schools.

- East Main needs wider sidewalks.
- Building code may makes some things cost prohibitive.
- Need more activities for kids.
- Sanitation needs to become a city utility.
- Downtown needs more public programming.
- There should be more decorations in the downtown. Especially during the holidays.
- Downtown needs more nightlife. Businesses should stay open later into the evening.
- Rundown parts of town need to be addressed. These areas are an issue for recruitment of U of O students.
- West side of town needs more sidewalks. Walkability needs to be addressed throughout the city.
- There needs to be a way for students and others to get to commercial centers without cars.
- Downtown needs commercial options that attract students.
- Farmers market needs to have larger farmer attendance.
- Clarksville does not have enough middle class jobs.

Assets:

- Downtown is growing slow and steady.
- Millage passed for new High School.
- Clarksville schools are perceived as better than other schools in the county.
 - Fine arts are a huge benefit.
- Citizens really like and use the trail system.
- University wants to build towards downtown.
- Plenty of parking downtown currently.
- University has regular student programming at the university. Possibility of working with the city to offer programming downtown?
- City run electric and water are and asset.
- Proximity to a plethora of outdoor recreation opportunities.

Recommendations:

- The city could pursue a neighborhood historic district.
- Marvin Vision Center should be expanded include a senior fitness center.
- The trail system should be expanded all the way down to Spadra Park.
- Could a trail be built in UPRR ROW that connects Clarksville to Clarksville?
- The city should develop a local arts council.
- There should be a community garden. Maybe in Cline Park?
- Utility lines need to be moved underground.
- School district and U of O should consider having some shared facilities.
- Downtown should focus on employment.
- Build more small scale parks incorporated into neighborhoods.
- Need wayfinding for city amenities, especially for trails.
- Downtown needs to have a coffee shop and an ice cream shop.
- Free Wi-Fi downtown.

Other:

- SF Residential is 80% of residential transactions.

- University owns 104 acres of land. Considering using some of it for recreational facilities.
- Armory building could be redeveloped for recreational uses.
 - Has non-conforming bathrooms and would take a significant effort to redevelop. There are also some grading issues.
 - Could become an events center, city maintenance shop, or recreational center for the university
 - Outdoor education center.
 - Climbing wall.
 - Outdoor equipment rental.
- Obesity rate is above the state average.
- Need to keep farmers market downtown.
- City should consider taking over Spadra Park.
- Need partnership between the city and the Forest Service to promote outdoor activities.

University of the Ozarks Area Charrette

Issues Ranked by Importance:

- I. Vision Concept: Sidewalks, bike paths, streetlights, green spaces, renovated buildings (8)
- II. Big Problems:
 - a. Lack of code enforcement (5)
 - b. Dilapidated buildings (4)
- III. Positive Steps:
 - a. Construct sidewalk down Buchanan from campus to Hurie Athletic Fields
 - b. Improvements to entry corridor

Other:

- *Well-planned infill (3)*
- *Resistance to multi-family residences and apartments (2)*
- *Establishing a shared-use agreement with the city and University (2)*
- *Establish a National Historic Registry District*
- *Flashing lights at Spadra Creek Trail Head (2)*
- *Add new trail from College to Main Street*
- *Make North Fulton a pedestrian area (close the street from Cherry to Main)*
- *Incorporate old railroad tracks into trail system*

Identify:

1. *Preserve: Areas or structures surrounding the University and Downtown that should be preserved.*
2. *Enhance: Areas or structures that are in good condition but need attention or code enforcement.*
3. *Transform: Areas or structures that pose health or safety hazards to the community, or areas that should be developed.*

Group 1

- A. *Vision Concept*
 - a. *Have as much property as possible between Montgomery and east of College north of Buchanan, west of Cherry should be zoned R-1 and enforced.*
 - b. *No debris in front yard*
- B. *Big Problems*
 - a. *No more R-3 in this area*
 - b. *No more spot zoning in this area*
 - c. *College Avenue needs streetlights*
- C. *Positive Steps*
 - a. *Add green spaces*
 - b. *Add sidewalks*
 - c. *Add streetlights*

Map Notes*Red: Transform*

- a. *Eyesore on the corner of Louise and Miller*
- b. *Eyesore on Louise near Johnson*
- c. *Houses immediately east of Hurie Athletic fields*
- d. *Apartments down Johnson*

Yellow: Enhance

- a. *Enforce codes along N Miller Street.*
- b. *Apartment on corner of Miller and Louise.*

Green: Preserve

- a. *Areas at northernmost end of North Miller.*
- b. *Enforce R-1 zoning in Brown-Miller-Buchanan-Louise.*

Group 2

- A. *Vision Concept*
 - a. *Homes in good repair without debris in yard*
 - b. *Rentals with single family units only*
 - c. *Green areas in neighborhoods*
 - d. *Well-planned infill*
 - e. *No multi-family residences*
 - f. *Sidewalks and bike paths*
- B. *Big Problems*
 - a. *Address apartment buildings*
- C. *Positive Steps*
 - a. *Shared use agreement for college facilities*
 - b. *Improvements to entry corridor*

Map Notes*Red: Transform*

1. First Presbyterian Church is of "no use"
2. Blight across from city hall
3. "no use" corner of N Cravens and Cherry
4. Code enforcement at Johnson and University
5. Code enforcement at Hill and Louise
6. Code enforcement at end of Jackson, 3-4 houses
7. Code enforcement along N Johnson between Kraus and Buchanan

Yellow: Enhance

- a. Disrepair at Cherry and N Cravens
- b. Enhance corner of college and Cherry: entry to district.
- c. Improve Walnut-N Central block
- d. Improve building near Trail Head
- e. Enforce building code along Miller Street
- f. Blighted house along Cherry near Johnson
- g. Enhance buildings along Brown, toward the north
- h. Develop a playground or park on west side of north Johnson.
- i. Renovate apartments at NW bend in Harmony.
- j. Build something useful at corner of Central Avenue and Buchanan near Hurie Fields.
- k. Sidewalks:
 - a. Along college
 - b. Along Buchanan to fields
 - c. In front of Forrester-Davis along Buchanan
- l. Walking area down College after split to Harmony.

Green: Preserve

- a. Preserve Forrester-Davis
- b. Raymond Chapel
- c. Spadra Trail

Group 3

- A. Vision Concept
 - a. Enhancing stock of college housing
- B. Big Problems
 - a. Code enforcement needs to be revamped
 - b. Lack of sidewalks on all streets
 - c. Street lighting
 - d. Transform East of Johnson and North of Buchanan
- C. Positive Steps

Map Notes*Red: Transform*

- a. Strip storage and offices: ugly along Cherry near First Pres.
- b. Ugly house south of University near bend in Johnson
- c. Ugly house on Louise between Miller and Hill
- d. Ugly house south of Louise east of Johnson
- e. Develop area north of Buchanan Northeast of Forrester Davis
- f. Transform North Johnson

Yellow: Enhance

- a. Walnut street south of Spadra Trail Head
- b. Walnut-College-N Central Block
- c. Bend in Johnson near Jackson
- d. Homes off Cherry between Hill and Johnson
- e. Home at the bend in Hill
- f. Area on Miller Street

Group 4

- A. Vision Concept
 - a. Homes in good repair without debris in yard
 - b. Rentals with single family units only
 - c. Green areas in neighborhoods
 - d. Well-planned infill
 - e. No multi-family residences
 - f. Sidewalks and bike paths
- B. Big Problems
 - a. Address apartment buildings
 - b. Need stricter code enforcement
 - c. Need stricter zoning
- C. Positive Steps
 - a. Shared use agreement
 - b. Improvements to entry corridor

Map Notes

Red: Transform

- a. Ugly apartments on E/W corners of Louise and Miller
- b. Raze ugly houses along Johnson and Jackson but preserve good ones

Yellow: Enhance

- a. Houses along Miller are in good condition, others need upkeep

Green: Preserve

- a. First Presbyterian Church
- b. Freemasons building south of City Hall
- c. Neighborhood along Buchanan and Miller

Group 5

- A. *Vision Concept*
 - a. *More sidewalks*
 - b. *More bike paths*
 - c. *More parks and green spaces for children to play*
 - d. *National / Historic registry district*
 - e. *Single family homes and apartments*
- B. *Big Problems*
 - a. *Lack of code enforcement*
 - b. *Dilapidated and abandoned structures*
 - c. *Redo drainage between Montgomery and Brown*
 - d. *Enforce codes in order to keep aesthetic nice*
- C. *Positive Steps*
 - a. *Add flashing lights at Spadra Creek Trail Head*
 - b. *Expand sidewalks further down College Avenue*

Map Notes*Red: Transform*

- a. *Area north of City Hall: "Make less scary"*
- b. *Housing on corner of Johnson and Louise*
- c. *Housing north of Hurie Athletic Fields "Make less scary"*
- d. *Put in sidewalks down College after split at Harmony*
- e. *Raze or redevelop dilapidated houses along Johnson*
- f. *Dilapidated houses along Miller*
- g. *Dilapidated housing at Hill near Cherry*
- h. *Dilapidated Housing on Johnson between University and Cherry*

Yellow: Enhance

- a. *Older Homes East and West of City Hall*
- b. *Need new homes on along Johnson*
- c. *Drainage on Brown street near Rhodes is poor*
- d. *Drainage on Montgomery is poor*
- e. *Widen Montgomery*
- f. *Enhance vacant lot east of Forrester-Davis by adding a park*
- g. *Enhance homes near Jackson, drainage in area needs attention*
- h. *Add flashing light at Spadra Creek Trail Head*

Green: Preserve

- a. *First Presbyterian Church*
- b. *Brick Building near Spadra Creek Trail Head*
- c. *Home at Miller and Louise Intersection*

Group 6

- A. *Vision Concept*
- a. *Turning dilapidated houses into student housing*
 - b. *Gentrifying houses in poor condition*
 - c. *New off-campus apartments*
 - d. *Well-maintained structures*
 - e. *Update soon-to-be university buildings*
- B. *Big Problems*
- a. *Many houses are not maintained*
 - b. *Houses need to be condemned / torn down*
- C. *Positive Steps*
- a. *Sidewalks*
 - b. *Enforce building code*
 - c. *Encourage new private development*
 - d. *Upgrading clause within property transactions on hearing*
 - e. *Encourage development of new business endeavors for personal and corporations with reduced property taxes*

Map Notes*Red: Transform*

- a. *Entire area from Cherry up Johnson to University to College to Walnut to Jackson: Ugly*
- b. *Many homes in the Rhodes-Hill Louise area*
- c. *Most areas within Kraus-Jackson-College and Buchanan*

Yellow: Enhance

- a. *Homes along Johnson and Hill*
- b. *Develop area between Hill and Johnson West of U of O*
- c. *Some homes down North Johnson could be enhanced instead of destroyed*

Green: Preserve

- a. *Homes at Miller Circle*
- b. *Homes at northernmost part of Miller Street, structures "ok"*
- c. *Green area near Harmony/College split*
- d. *Home south at Kraus and Johnson*

Group 7

- A. *Vision Concept*
- a. *Addition of a new trail from College to Main Street, railroad*
 - b. *Repurpose U of O Main, Johnson, Jackson, old railroad track*
- B. *Big Problems*
- a. *Code enforcement needs to be revamped*
 - b. *Lack of sidewalks on all streets*
 - c. *Dilapidated properties need to be condemned*
 - d. *Street lighting should be modeled after the university*
- C. *Positive Steps*

- a. *Between Hill and North Johnson create a park*
- b. *Construct a sidewalk down Buchanan for student pedestrians*
- c. *Make old railroad tracks part of the trail system*
- d. *Create play structures in green spaces*
- e. *Add a pocket library*
- f. *Add a functional fitness area in a green space*
- g. *Make North Fulton Pedestrian only*

Map Notes

Red: Transform

- a. *Put in a pedestrian thoroughfare at Fulton*
- b. *Put in a trail with lights from Railroad Street through to connect to Spadra Trailhead*
- c. *Put in lights along Johnson*
- d. *Enforce code / Condemn property along Louise near Johnson*
- e. *Enforce code / Condemn properties along Miller*
- f. *Sidewalks along Miller*
- g. *Sidewalks along Hill*
- h. *Lights and sidewalks along Buchanan*
- i. *Enforce code with apartments off Harmony*
- j. *Put in a green space between College and Harmony Split*

Yellow: Enhance

- a. *Park between Hill and Johnson*
- b. *Homes along Buchanan between Hill and Miller*
- c. *Develop area east of Forrester-Davis*
- d. *Intersection of Kraus and Johnson*
- e. *Enhance Forrester-Davis*
- f. *Enhance homes at corner of Walnut and Johnson*
- g. *Enhance homes at corner of Walnut and College*
- h. *Enhance development between college and Jackson along Cherry*
- i. *Enhance Jackson near Cherry*
- j. *Enhance Johnson near Cherry*

Green: Preserve

- a. *Green areas along Walnut between Central and College*
- b. *First Presbyterian Church*
- c. *Spadra Creek Trail*

Visual Preferences

At the U of O Area charrette, images were rated on a scale of 1 through 5, with 1 being least desirable and 5 being most desirable.

Infill Duplex



Average: 3.81

Standard Duplex



Average Score: 2.81

Apartments with Landscaping



Average Score: 2.13

Snout House



Average Score: 3.07

Small Lot Single-Family



Average Score: 2.63

Mansion Four-Plex



Average Score: 2.86

Standard Single-Family



Average Score: 3.00

Small Scale Apartments



Average Score: 2.44

Metal House



Average Score: 1.53

Manufactured Home



Average Score: 3.29

Craftsman Home



Average Score: 3.95

Townhouses

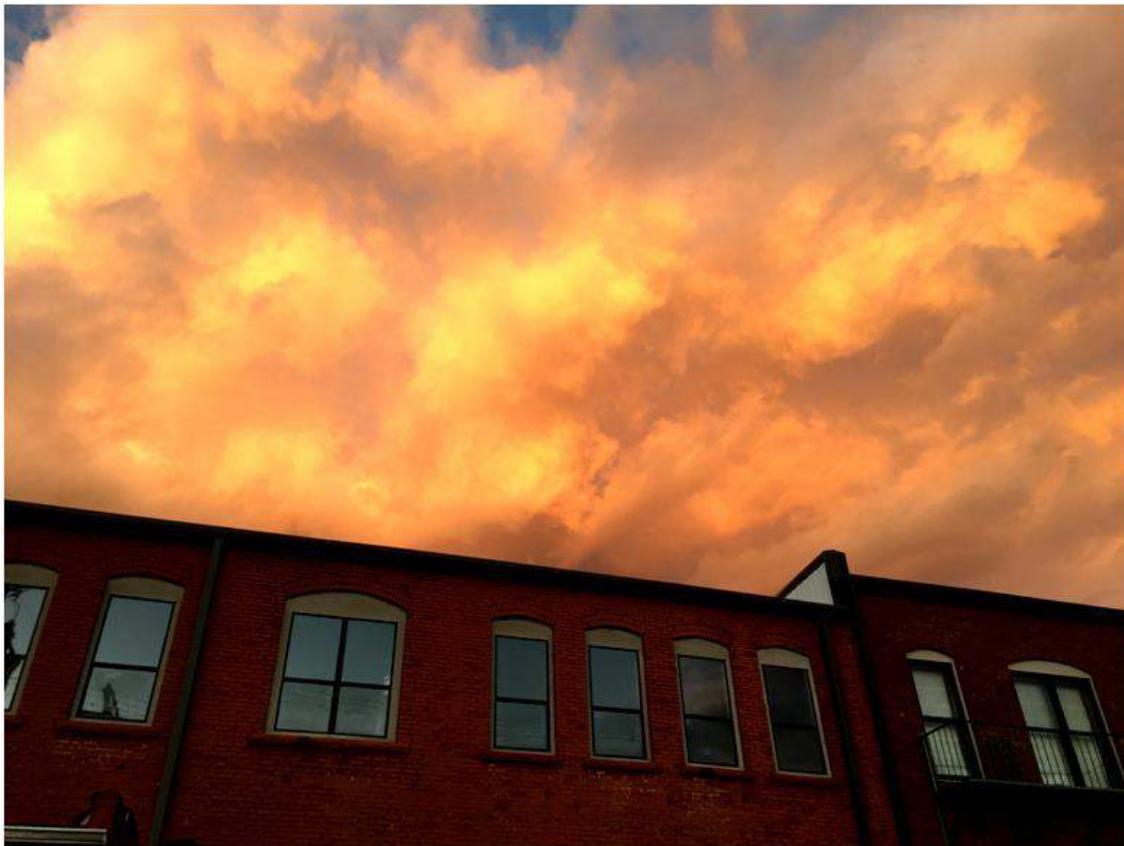


Average Score: 2.87

Residential and Retail

MARKET ANALYSIS

For the City of Clarksville, Arkansas



Downtown Clarksville

November 28, 2017
Prepared for the City of Clarksville and
Garver

By **Randall Gross / Development Economics**

INTRODUCTION

This document provides a summary of findings from a market analysis of residential and retail development potential in Clarksville, Arkansas as input to the city's Comprehensive Plan. Information was collected and analyzed on existing market conditions, including an inventory of existing building use in key nodes. Overall demographic and economic trends were analyzed to provide context to an understanding of market opportunities and constraints. The market analyses forecasted the economic potentials for development of both retail and residential uses within the city; and provide a basis for strategic recommendations for land use and development.

Section 1 of this report provides input from an Existing Conditions and Site Analysis conducted for the city, with a particular focus on downtown and other key nodes. Basic demographic and economic trends are also examined in this section. Section 2 provides a summary of findings from the Housing Market Analysis, while section 3 focuses on findings from the Retail/Commercial Market Analysis. The retail market study included an assessment of potential for restaurants, entertainment and personal services.

Section 1. EXISTING CONDITIONS

This section provides an overview of existing conditions for Clarksville. Demographic and economic trends are examined as context for this market analysis. A summary of building inventory is provided of existing economic uses in Clarksville, with more detail discussed within the context of the individual market analyses. Location, access, sub-areas or districts, physical conditions, and other factors are considered within this overview as they relate to the opportunities and constraints for development in the city.

Location and Accessibility

Clarksville is located in Johnson County in northwest Arkansas, just off of Interstate 40, between Fort Smith and Little Rock. The city is situated just under 30 miles from Russellville, 60 miles from Fort Smith, 92 miles from Fayetteville, and just over 100 miles from Little Rock. Interstate 40 provides direct access to Fort Smith, Russellville, Little Rock and points east and west across the width of the U.S. Being located within the Ozark mountain region brings both accessible amenities as well as isolation from major metropolitan centers. Given its location, Clarksville serves as a sub-regional service node for an area including Johnson County and small portions of neighboring Newton, Madison, Franklin, and Logan counties. However, the city's service area is somewhat constricted by the presence of larger cities in the region. The city also has excellent access to the Arkansas River (situated on beautiful Lake Dardanelle) and to a Class 1 railroad.

South Crawford Street provides direct access from an exit at I-40 north into downtown Clarksville and south to the city's industrial areas including the Walmart Distribution Center. South Rogers Street (Route 103) also carries traffic north from an exit on I-40 into downtown Clarksville and south (via Jamestown Road) to the Spadra Waterfront Marina on the Arkansas River.

U.S. Route 64 is an important cross-country federal highway that parallels Interstate 40 in Clarksville. This 2,330-mile highway was constructed in 1926 to carry cross-country traffic from the Atlantic shores of North Carolina to Arizona. Highway 64 was (and remains) Main Street in downtown Clarksville and was therefore an important generator of travel and traffic through the city for decades. But completion of 2,550-mile Interstate 40 from Wilmington, North Carolina to Barstow, California largely supplanted this route for long-distance travel and bypassed the center of Clarksville. As such, much of the commercial exposure afforded the city by Highway 64 is less advantageous today.

Ozark Mountains & Lake Dardanelle

Clarksville is sandwiched between the northern portion of the Ozark National Forest (ONF) and Lake Dardanelle on the Arkansas River. The forest is located just four miles from the city's northern boundary, while the southern portion of the forest (and nearby Mt. Magazine State Park) is located about 8 miles south of the city. The Ouachita National Forest is located just south of ONF. In essence, Clarksville is situated nearly at the center of a great mountain range, beautiful lake, and federally-recognized forest system that provide it with access to immense natural beauty and recreational amenities. Among the few places in the state that might rival this location is the nearby town of Ozark, which (due to its name) is more easily branded to take advantage of this amenity value.

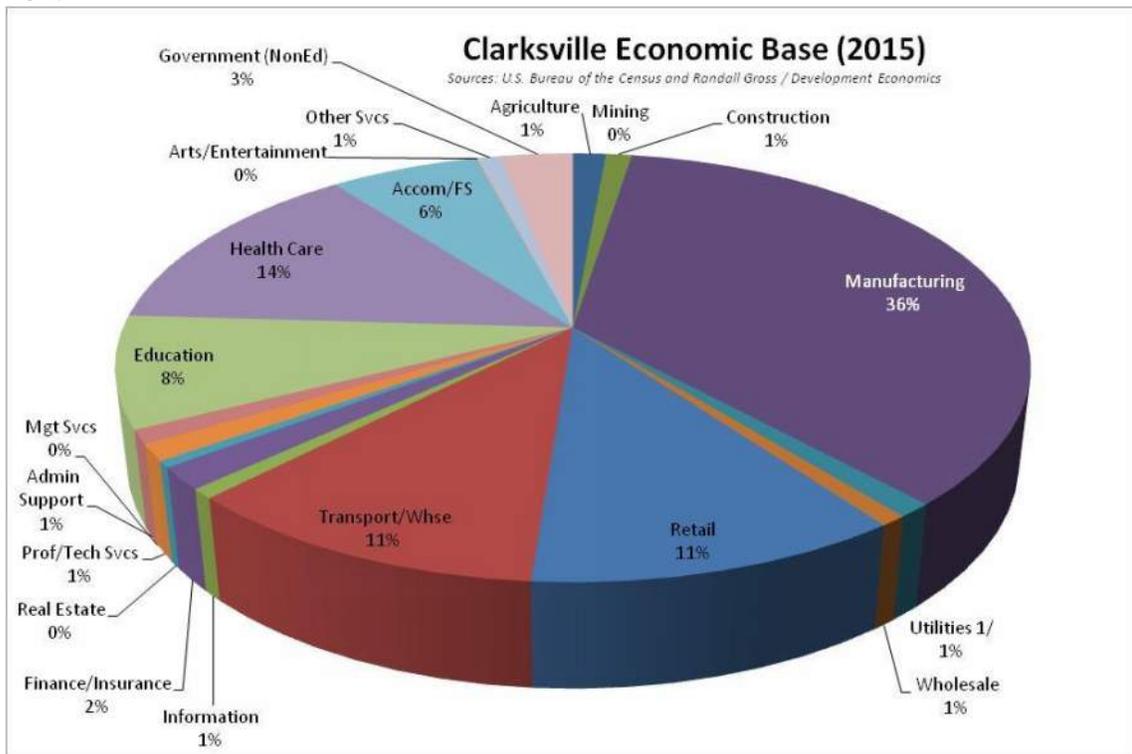


Economic Base

Clarksville’s economy is heavily dependent on manufacturing, which represents nearly 40% of all jobs within the city. The next three largest sectors include health care (14%), retail (13%), and transportation & warehousing (13%). Thus, nearly four out of five jobs in the city are concentrated in just four sectors.

Several sectors have somewhat modest representation in the city, including education (8% of all jobs), accommodation & foodservice (6%), and government (3%). Meanwhile, many economic sectors are relatively under-represented in the city. The city has little or no employment in Management Services (e.g., corporate headquarters or holding companies), arts & entertainment, real estate, and mining. Administrative support services, professional & technical services, information services, wholesale trade, utilities, construction, agriculture, and other services each represents just 1.0% of the local economy while finance & insurance represents just 2%.

Chart 1



Employment and Labor Force Trends

The Clarksville economy has remained relatively stagnant even since the end of the global financial crisis and national recession of 2008-09. While unemployment has fallen in Johnson County from 7.9% in 10/2010 to 3.1% in 10/2017, the labor force has also shrunk. Johnson County’s labor force fell from 10,977 in 2010 to 10,518 by 2015 (a decrease of 4.2%). The Johnson County labor force had still not recovered to pre-recession levels by October 2017. Similarly, Clarksville’s employment had fallen during the recession, and is just now returning to pre-recession levels.

The city has total employment of about 6,700, according to the U.S. Bureau of the Census. This represents a decrease of about 100 (1.5%, or 0.2% per year) since 2003, although the employment base decreased at a faster rate after 2010 (3.9% per year). Clarksville saw only marginal growth or a decrease in employment in nearly all sectors, with the exception of transportation & warehousing (up by 127 jobs or 20.9%), government (64, 45.3%), and health care (51, 6.0%). The administrative support sector expanded by 30.2%, but it only added 16 jobs to a small base in Clarksville.

Table 1. AT-PLACE EMPLOYMENT TRENDS, CLARKSVILLE, 2003-2015						
Industry	2003	2010	2015	Number	2003-2015 Change	
					Percent	Per Year
Agriculture	160	140	92	(68)	-42.5%	-3.5%
Mining	4	9	-	(4)	-100.0%	-8.3%
Construction	76	56	72	(4)	-5.3%	-0.4%
Manufacturing	2,484	2,579	2,352	(132)	-5.3%	-0.4%
Utilities	77	82	70	(7)	-9.1%	-0.8%
Wholesale	51	70	53	2	3.9%	0.3%
Retail	790	769	737	(53)	-6.7%	-0.6%
Transport/Warehse	607	637	734	127	20.9%	1.7%
Information	41	33	48	7	17.1%	1.4%
Finance/Insurance	137	140	111	(26)	-19.0%	-1.6%
Real Estate	60	29	32	(28)	-46.7%	-3.9%
Prof/Tech Services	76	61	82	6	7.9%	0.7%
Mgt Services	4	-	-	(4)	-100.0%	-8.3%
Admin Support	53	47	69	16	30.2%	2.5%
Education	541	613	555	14	2.6%	0.2%
Health Care	849	921	900	51	6.0%	0.5%
Accommodation/FS	472	412	417	(55)	-11.7%	-1.0%
Arts/Entertainment	5	7	4	(1)	-20.0%	-1.7%
Other Services	70	54	63	(7)	-10.0%	-0.8%
Government (Non-Ed)	139	200	202	63	45.3%	3.8%
TOTAL	6,696	6,859	6,593	(103)	-1.5%	-0.2%
Sources	U.S. Bureau of the Census and Randall Gross / Development Economics.					

The manufacturing sector lost more than 130 jobs in Clarksville over the 12-year period, but has actually lost 227 jobs since 2010 (after gaining employment up to that date). Despite this relatively large numerical loss, the manufacturing sector still dominates Clarksville’s employment base and the loss only represents a 5.3% decrease. The city also lost significant numbers of jobs in agriculture, retail, finance & insurance, real estate, and accommodation & foodservice. Losses in tourism-related industries are perhaps the most distressing, since the sector is less dependent on the local demographic base. The city forms the heart of a significant agricultural region, with a particular strength in peach production.

Major Employers

In 2013, the largest employers in Clarksville and Johnson County included Tyson Foods, Walmart Stores, Hanesbrands, Johnson Regional Medical Center, Clarksville School District, Baldor Electric Company, University of the Ozarks, and Munro & Company. Of these entities, 50% were engaged in manufacturing and 25% in education. Walmart operates an 850,000 square-foot distribution facility in Clarksville, which may account for some of the growth in transportation and warehousing employment since 2003.

Commutation Patterns and Trends

A significant share (78.4%) of Clarksville's workers commute to their jobs from outside of the city. Only 21.6% of Clarksville's jobs are held by Clarksville residents. Clarksville's workers come from a wide variety of places including Russellville, Fort Smith, Springdale, and Little Rock but also from dozens of small towns in the region. In general, just less than one-half (46.7%) originate in Johnson County, with significant numbers commuting from Pope (7.3%), Logan (4.7%), Benton (3.5%), Washington (3.1%), Franklin (2.9%), Sebastian (2.7%), and Pulaski (2.1%) counties. This area roughly defines the city's extended labor market area.

Meanwhile, more of Clarksville's residents work outside of the city (57.4%) than in it (42.6%). Significant numbers work in Russellville (e.g., Entergy's Arkansas Nuclear One Plant); or in Little Rock, Lamar, and Knoxville. Just over 50% stay in Johnson County to work, while nearly 10% commute to Pope County, 8% to Pulaski County, and 3% to Logan County for work. Others commute to Yell, Sebastian, Benton, Faulkner, Franklin, and other counties. Overall, Clarksville seems to have the strongest economic relationship with Russellville and Pope County, the closest micro- or metropolitan area.



Demographic Trends

Clarksville's basic demographic trends are described below as background for the market assessment. More detailed demographic analysis underpins the housing, retail and other market assessments summarized later in this report.

Table 2. DEMOGRAPHIC TRENDS, CLARKSVILLE & JOHNSON COUNTY, 2000-2016						
Location, Factor				Change 2000-16		
	2000	2010	2016	Number	%/Year	2010-16
Clarksville						
Population	7,719	9,178	9,391	1,672	1.4%	0.4%
Households	2,960	3,462	3,615	655	1.4%	0.7%
Median Income	\$34,214	\$ 43,125	\$ 30,849	\$(3,365)	-0.6%	-4.7%
Johnson County						
Population	22,781	25,540	26,025	3,244	0.9%	0.3%
Households	8,738	9,812	10,014	1,276	0.9%	0.3%
Median Income	\$38,900	\$ 33,672	\$ 34,031	\$(4,869)	-0.8%	0.2%
Note:	Median Income is expressed in constant 2016 dollars. (Adjusted for inflation).					
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.					

Population & Households

Clarksville had a total estimated population of 9,391 in 2016, according to The U.S. Bureau of the Census, American Community Survey. This number is up by about 1,700 since 2000, resulting in an average annual increase of 1.4%. However, since 2010, population growth has slowed, with an annual average increase of just 0.4%. Similarly, the city gained about 660 households over the 16-year period for an annual increase of 1.4%, but household growth has slowed to 0.7% per year.

Johnson County had an estimated population of 26,025 in 2016. As such, Clarksville accounted for just over 36% of the county's total population base. Clarksville's share of the county's population increased from about 34% in 2000. The county's population and household growth has also slowed to just about 0.3% per year.

Household Income

Clarksville has an estimated median household income of \$30,849, according to American Community Survey data. This number represents a decrease of about 0.5% since 2000 in constant dollar terms (after accounting for inflation). However, incomes in the city have regressed significantly since 2010, with an annual decrease of 4.7% in real dollars. Such rapid negative income growth suggests underlying economic instability, with the city being seriously impacted by the effects of the national recession in 2008-09. As employment has gradually returned to the city, wages have not kept apace.

Johnson County's overall incomes are slightly higher than those within the city of Clarksville, but incomes across the county also dipped in real terms between 2000 and 2016. However, households outside of the city have seen their incomes bounce back at a faster rate since the recession, with overall incomes have risen by 0.2% per year in real terms since 2010. While income growth in the county is slow, it is nevertheless slightly faster than the rate of inflation.

Summary of Existing Inventory

Clarksville is largely residential, with about 3,900 housing units (2016 estimate) in its 19.13 square miles. Within its commercial and industrial nodes, Clarksville has approximately 750,000 square feet of retail/commercial, an estimated 6.0 million square feet of industrial and 210,000 square feet of office space. Aside from local schools, the University of the Ozarks is the primary post-secondary institution in the city. There is some land provided for parks and recreation, including Clarksville City Park, Clarksville Aquatics Center, and the Spadra Creek Nature Trail.

Nodes and Corridors

Downtown Clarksville remains an important commercial node for the city, although there is a general lack of new investment and business activity. Downtown is anchored by the County Courthouse a Fred's Discount Store and several prominent furniture stores. There are relatively few major non-governmental employers located in the downtown area. South Rogers Street is the city's primary commercial corridor, linking downtown with I-40. Main Street (U.S. Highway 64) is the city's primary commercial corridor east and west of downtown. Roads such as South Crawford Street and West Clark Street also have small clusters of commercial activity. Interstate 40 Commerce Park offers 127 acres of serviced, City-owned land for industrial development.

Physical Conditions

Like any small city, Clarksville's housing and commercial conditions vary wildly within a relatively short distance. Within downtown-are neighborhoods, there are stately historic homes with well-manicured lawns alongside humble frame houses in need of structural maintenance. There has been little pro-active investment in streetscape or neighborhood identity, and most roads into and out of the city provide the typical suburban highway-oriented commercial context. Downtown is pleasant, with a relatively high percentage of remaining historic and vintage buildings that provide a nostalgic small-town feel. Unfortunately, some of these buildings have been allowed to deteriorate or are in poor condition. Among these are fire-damaged buildings at the very gateway into downtown near Spadra Creek on Main Street. Aside from the courthouse lawn, downtown also lacks destination public space for events and destination activities. The University of the Ozarks has a welcoming, well-manicured campus located within a short walk of the center of downtown. Surrounding areas, including Lake Dardanelle on the Arkansas River and portions of the Ozark National Forest, provide a stunning backdrop for the city. Unfortunately, few of the city's residential or commercial neighborhoods are situated where they can take full advantage of views or direct access to these amenities. Nevertheless, the city can act as a "gateway" to these wonderful natural areas.

Section 2. HOUSING MARKET ANALYSIS

The housing market analysis forecasted the potential for housing development and rehabilitation within the city of Clarksville as an input to the comprehensive planning process. Existing housing market conditions were analyzed based on field reconnaissance, and analysis of Census data, apartment inventory, and housing sales trends information. A housing market area was defined and household demographics projected through 2022. Based on the demographic forecasts, employment trends, and other factors, housing demand was forecasted. The competitive context was analyzed and the city’s capture of future demand determined within key demographic cohorts and market segments. The findings from this analysis are summarized below.

Housing Supply and Characteristics

Clarksville has a total of about 3,900 housing units. Nearly 70% of these units are in single-family detached homes, while another 17% are in 2-4-unit buildings. There are relatively few units in larger, multi-family buildings and Clarksville has almost no attached single-family housing (e.g., townhouses). The city does have residents living in about 250 mobile homes.

Table 3. TRENDS IN HOUSING STRUCTURE, CLARKSVILLE, 2010-2016				
Factor	2010	2016	2010-2016 Change	
			Number	Percent
1-Unit Detached	2,577	2,681	104	4.0%
1-Unit Attached	40	23	(17)	-42.5%
2-4 Units	642	670	28	4.4%
5-9 Units	94	103	9	9.6%
10-19 Units	171	127	(44)	-25.7%
20+ Units	36	62	26	72.2%
Mobile Homes	121	243	122	100.8%
Boat, RV, Van.	-	-	-	0.0%
TOTAL	3,681	3,909	228	6.2%
Sources:	U.S. Bureau of the Census ACS and Randall Gross / Development Economics.			

The number of housing units is estimated to have increased by about 230 since 2010, for an average increase of about 38 per year. However, a large share of this increase has been in mobile homes, which do not require a building permit. Only about 100 single-family homes are estimated to have been added since 2010, yielding an average increase of just 16 per year. Meanwhile, the number of attached single-family and mid-sized multi-family buildings actually declined since 2010.

Neighborhoods

There are a number of neighborhoods in the city and surrounding areas of Johnson County offering a variety of housing in terms of age, style, and price. Older subdivisions like Thompson’s Addition offer affordably-priced housing (\$70,000 to \$100,000) for first-time buyers, retirees and others. Craighead Addition has brick homes for \$100,000 to \$150,000, whereas most new construction in that price range will have vinyl siding due to the price of construction. Self-Help Housing offers the Pleasant Homes development with affordable housing in the \$50,000 to \$70,000 range. Sherwood offers a stable neighborhood of homes priced in the \$90,000 to \$150,000 range for retirees.

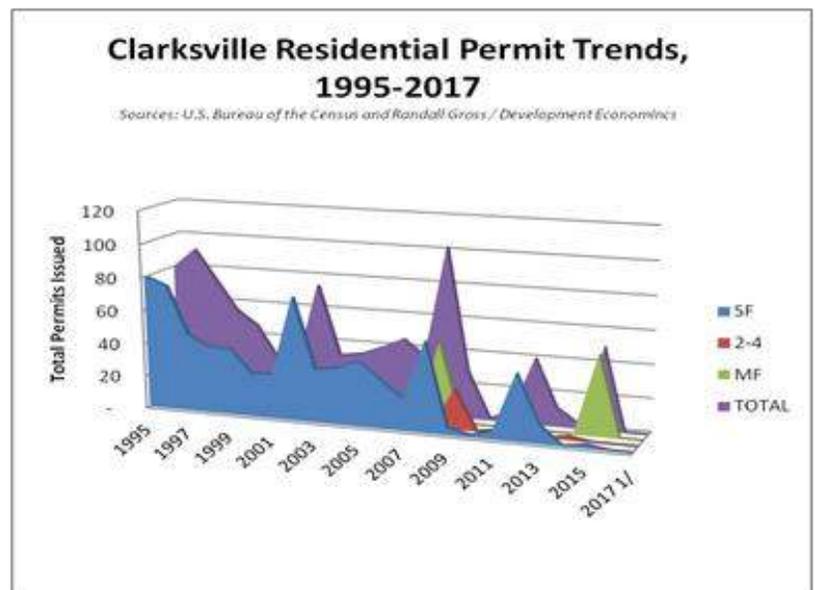


Higher-End. The Grandview has higher-end housing priced up to \$400,000 that appeals to doctors, CPAs, and other professionals. Millwood’s homes sell in the \$130,000s to \$140,000s but range up to \$350,000. Rosemary is a 15-year old development with lake-view estate homes priced in the \$150,000 to \$350,000 range. Ridgewood and West Ridge, where most lots are bought out, have homes ranging from \$150,000 to \$200,000. Willett Branch is also 15 years old, with homes priced \$150,000 to \$250,000. Stewart Place is somewhat newer, with 50+ homes in the \$150,000 (Phase 1) to \$250,000 (Phase 2) range, purchased by Tyson managers, teachers and mid-level professionals.

Downtown. Parts of downtown are located in a 200-year floodplain, which limits new construction. Overall, there is nevertheless significant diversity in the downtown area, with older historic homes and duplex or triplex properties used for student rentals. Prices range from \$30,000 to \$200,000 or more. On the north side towards the university are homes selling for \$30,000 to \$175,000 (most around \$100,000) as investment properties. A new 8-home subdivision along Montgomery is priced in the \$150,000 range. Oakland Estates is a 20-year-old subdivision with affordable homes in the \$50,000 to \$80,000 range.

Construction Trends

The City of Clarksville has issued nearly 900 housing permits (an average of 41 per year) since 1995. However, housing construction has gradually declined in Clarksville since that year. Between 1995 and 1999, the City issued an average of almost 70 permits per year, including 56 single-family and 13 multi-family units per year. Between 2000 and 2009, the number fell to 44 per year, including 34 single-family units. That period includes the recession of 2000-2001, when permits fell to just 26 per year overall. The most recent global financial crisis and recession seems to have had a devastating impact on Clarksville’s housing market, which has seen only 14 units (7 single-family) permitted per year on average since 2010. This number is even lower than the 16 per year determined based on Census housing estimates but is consistent with information supplied by brokers and realtors active in the market.



Housing Market Indicators

Clarksville has a total of 3,900 housing units, up by about 220 or 5.9% since 2011. As one indicator of demand, the number of occupied housing units has increased by 340 or 10.4% since 2011, yielding a declining vacancy rate. Overall housing market indicators are summarized below.

Table.4 TRENDS IN HOUSING OCCUPANCY, CLARKSVILLE, 2011-2016				
Factor	2011	2016	2011-2016 Change	
			Number	Percent
Total Units	3,692	3,909	217	5.9%
Occupied	3,273	3,615	342	10.4%
Renter Occupied	1,438	1,553	115	8.0%
Vacancy	11.9%	4.1%		
Median Rent	\$ 608	\$ 618	\$ 10	1.6%
Owner Occupied	1,835	2,062	227	12.4%
Vacancy	0.6%	2.6%		
Median Value	\$86,800	\$ 92,300	\$ 5,500	6.3%
Note:	ACS estimates are 2012-2016 & 2007-2011.			
Sources:	U.S. Bureau of the Census, American Community Survey; and Randall Gross / Development Economics.			

Rental Housing

There are about 1,550 renter-occupied units in Clarksville, representing 39.6% of the total. There are seven low-income housing developments in the city with a total of 396 units. A 34-unit affordable housing development has recently been built on Highway 64 East. Otherwise, there is very little new rental housing product in the Clarksville market. Much of the rental housing stock is in single-family homes held by investors and is not always well-maintained.

Vacancy. The city's vacancy rate peaked at nearly 12% just after the recession but has fallen back to about 4% today. This vacancy is within the normal range for a healthy market where there is a balance between supply and demand. One company manages about 90 units averaging 6 to 8% vacancy. New low-income housing filled up fairly rapidly, thus helping to meet some pent-up demand for affordable housing in the city. The number of rental listings on Trulia.com has increased significantly since April 2017, but the numbers (20 listings in August 2017) are still relatively small.

Rents. Median Census rents have remained relatively stable since the end of the recession, at around \$620 per month. This amount represents just a 1.6% (\$10) increase since 2011, or 0.3% per year. In the year from September 2016 to August 2017, median active listing rents on Trulia.com increased from \$747 to \$750 or \$0.4%, which is consistent with the Census numbers. Such increases are not likely to meet the overall inflation rate for maintenance and management of rental properties, so it is likely that overall profitability is declining. Typical rents among properties managed by one large investor average \$425 for 2 BR / 1 BA units and \$650 to \$850 for 3 BR / 2-3 BA units.

Key Market Segments. Clarksville renters include a number of families with limited resources. About 25% of the city's occupied rental housing stock is subsidized for low-income households. There are young families including single parents or young people with or without children, working in their first job. Some people who transfer to the area for work will rent an apartment first before seeking permanent housing to purchase. Singles, divorcees, and widows/widowers are also among those most likely to rent in the city.

For-Sale Housing

There are about 2,060 owner-occupied housing units in Clarksville, representing a relatively low homeownership rate of 52.7%. That being said, the number of owner-occupied units has increased by 12.4% since 2011, helping to stabilize the market. Vacancy was exceptionally low in 2011, at just 0.6% and has increased since then to 2.6%. Rising vacancy may be a sign that more housing is becoming available in the market. The median value of homeowner units is now estimated at \$92,300, which represents a 6.3% increase since 2011 but is still comparatively low by national and regional standards.

Sales Activity. The number of homes listed and sold in the Clarksville market has remained relatively stable since 2010, at an average of about 250 per year. Only 2012 saw the number of sales dip below 200, while 2015 saw the largest sales volumes recorded, at more than 280. Based on sales to-date through October, 2017 sales have totaled an estimated 276, up from 258 in 2016.

Price Trends. According to the Multiple Listing Service (MLS), Clarksville’s sale prices have increased by 20.8% since 2010. Prices only began increasing in earnest around 2014, or five years after the national recession had ended. Prices peaked in 2016 at \$104,200 and fell back slightly in 2017 (annualized to-date) to \$97,700. However, the last few months of 2017 saw prices increase again to \$107,216 in October and houses appear to be spending less time on the market before they are sold. Since the monthly averages are based on small numbers of sales, they tend to fluctuate significantly.

A handful of new homes (typically 3 BR/2 BA) have been built each year after the recession for sale in the \$115,000 to \$125,000 range. Regardless of the minor fluctuations in median sales price, the median list price per square foot on Trulia.com has remained static at or around \$70 per foot for about four years. Housing sales trends are summarized in the table that follows.

Table 5. HOUSING SALES TRENDS, CLARKSVILLE AREA, 2010-2017		
Year	# Sales	Ave Price
2010	229	\$ 80,922
2011	265	\$ 81,327
2012	188	\$ 91,566
2013	208	\$ 91,373
2014	269	\$ 95,165
2015	282	\$ 97,551
2016	258	\$ 104,155
2017	276	\$ 97,734
Average	247	\$ 92,474
Note:	1/ 2017 annualized from 10 mos.	
Sources:	Multiple Listing Service, Arkansas Realtors Association; and Randall Gross / Development Economics.	

Construction Costs vs Sale Prices. Construction costs in central Arkansas (Little Rock area) are estimated to fall in the range of \$90.64 to \$134.59 per square foot, with an average of \$112.62. At this cost, a 1,800 square-foot house would logically be priced at about \$220,000 to \$250,000, depending on land prices. Lots in Johnson County are averaging \$15,000 to \$18,000, while those in city subdivisions are priced around twice that amount, at \$30,000+.

Thus, new housing (of 1,800 square feet) in Clarksville would need to approach the upper end of the range or \$250,000 to be profitable for most home builders. Clarksville housing prices have averaged \$92,500 over the last seven years (or about \$100,000 to \$110,000 at present), and newer construction tends to sell in the \$125,000 range, on average. Housing sold at such prices would, by necessity, be of a smaller size (1,100 square feet) and constructed of cheaper materials (e.g., siding to yield lower costs at the \$90/sf range) in order to be profitable, assuming land costs can be held down.

Key Market Segments. Based on housing sales, economic indicators, and interviews with agents and brokers, the largest segment (40%) in the Clarksville market has been identified as first-time home buyers. These buyers typically fall within the 25 to 35 age cohort and are moving up out of rental apartments or living with parents. The second-largest group purchasing housing in Clarksville may investors (20 to 25%), the majority of whom are local or live in nearby Russellville and surrounding areas. The investors purchase property to generate secondary income through rentals to 1st-time renters, such as women with children or young people employed in their first job.

The remainder of the market is split between retirees (15-20%), job transfers (15%), and those up- or down-sizing (10-15%) in the local market. Retirees aged 55 to 75 relocate to the area from Florida, Illinois, California, Texas, Ohio, and other states for a combination of reasons, such as to be in the mountains and have a moderate climate, or due to the low cost of living and a slower lifestyle. There are always job transfers as area employers expand or as people retire or move and are replaced in their positions. Up-sizing householders include those aged 40 to 50 who are selling a smaller home and building a larger new one as well as those whose families are expanding in size. Down-sizing householders include those aged 70 and over with increasing health issues or who otherwise no longer want to maintain a larger house and yard. To summarize:

- First-time buyers 40%
- Investors 20-25%
- Job transfers 10-15%
- Retirees 15-20%
- Up/downsizing 10-15%

Housing Market Area

For the purposes of this analysis, the Clarksville Housing Market Area is defined to primarily include the city of Clarksville and surrounding areas of Johnson County. There is also some housing demand generated from employment centers in Russellville and from retirement-age households in colder, “flatland” states or expensive coastal cities.

Demographic Analysis

Trends, characteristics, and projections in households by income, age cohort, sub-market, and other factors were examined as a basis for forecasting housing demand in the Clarksville market area. Other inputs impacting on demand are changes in the retirement market base and growth at Clarksville- and Russellville-area employers. “Job-induced” growth, especially in the downtown area, is incorporated into the overall demand forecasts.

Age & Tenure

Among the key factors impacting on housing demand is the tenure of housing. Within the city of Clarksville, about 43% or 1,550 units of housing is in rental occupancy. However, tenure varies and is closely correlated with age. Younger people, especially singles, tend to chose rental options over purchasing homes for a variety of reasons, not the least of which is affordability. Hence, only 10% of Clarksville’s householder aged 15 to 24 are homeowners, while 55% of those aged 35 to 44 own their homes.

Homeownership increases with age until the peak around age 45. Within Clarksville, homeownership falls rapidly for those over that age, with less than 25% of householders aged 55 to 64 owning a home and just 22% of those aged 75 to 84 owning their home. Housing tenure patterns are illustrated below.

Table 6. HOUSING TENURE BY AGE COHORT, CLARKSVILLE, 2016				
Age Cohort	Renters	Owners	TOTAL	Share Rent
15-24	233	25	258	90%
25-34	227	251	478	47%
35-44	421	342	763	55%
45-54	277	322	599	46%
55-64	130	410	540	24%
65-74	159	348	507	31%
75-84	64	229	293	22%
85+	42	135	177	24%
TOTAL	1,553	2,062	3,615	43%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			

Without any pro-active intervention, the city of Clarksville is projected to add about 75 households within the next five years. Much of this growth will occur within two primary age cohorts – Baby Boomers and Millennials. Clarksville will add about 70 households headed by Baby Boomers between ages 55 and 74. The city is also projected to add about 60 Millennial-headed households.

These demographic patterns are mirrored in the projected household growth throughout the Clarksville housing market area. For example, Johnson County (outside of Clarksville) is projected to add about 130 households. The county will add nearly 200 Baby Boom householders but will see a dearth of middle-age householders due to the “Baby Bust” that followed the end of the baby boom in the early 1960s. The Russellville area will add about 300 households, with much of that growth concentrated among householders aged 65-74 and 35-44. Similar patterns emerge in other parts of Pope County.

Table 7. HOUSEHOLD FORECASTS BY AGE & TENURE, CLARKSVILLE, 2018-2023			
Age Cohort	Renters	Owners	Total
15-24	28	3	31
25-34	(33)	(37)	(70)
35-44	33	27	60
45-54	(11)	(13)	(24)
55-64	4	12	16
65-74	15	33	48
75-84	2	8	10
85+	1	2	3
TOTAL	39	35	74
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Income Cohorts

Household income also influences the demand for housing. Within Clarksville, there will be growth in nearly all income cohorts over the next five years, with the most significant growth clustered in the \$50,000 to \$125,000 household income range. Households within this income range can generally afford housing costs in rent or mortgage of about \$1,100 to \$2,800 per month. Household forecasts by income cohort are summarized below.

Income Cohort	2018	2023	Change
<\$15,000	594	544	(50)
\$15-\$25,000	620	586	(34)
\$25-\$35,000	552	565	13
\$35-\$50,000	639	644	5
\$50-\$75,000	587	615	28
\$75-\$100,000	274	314	40
\$100-\$125,000	127	155	28
\$125-\$150,000	76	86	10
\$150-\$200,000	60	73	13
\$200,000+	63	84	21
TOTAL	3,592	3,666	74
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

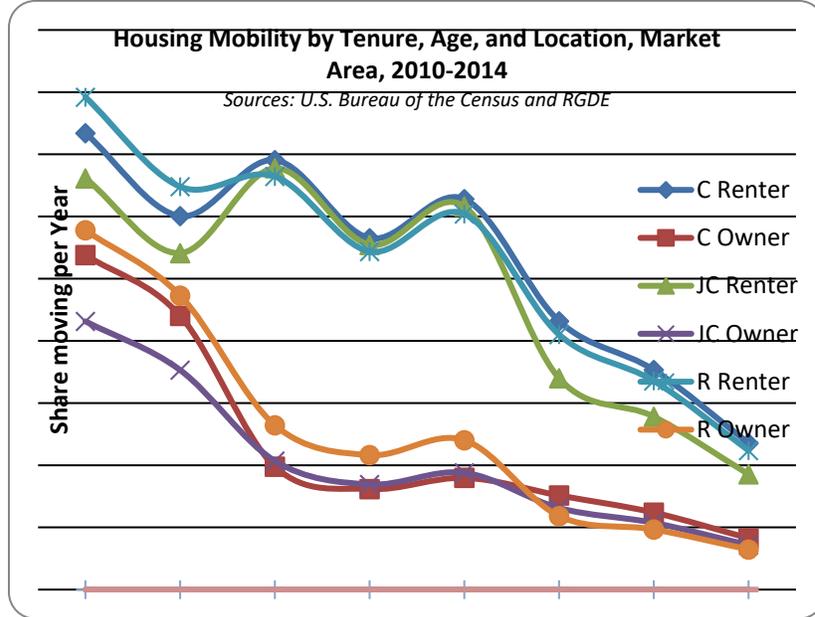
The number of households with incomes below \$25,000 will fall, mainly to the effects of inflation. Nevertheless, nearly one-third of Clarksville households will continue to have incomes below \$25,000 per year. As noted elsewhere in this report, income growth is slowing in the region. Overall, median household income is expected to increase in Clarksville by just about 1.2% per year over the next five years. This rate is low compared to growth of 1.9% from 2000 to 2018. However, this growth rate does not adjust for inflation. More detailed analysis of income patterns is provided in the retail market analysis in this report.

Area	2000	2018	2023
Clarksville	\$ 27,658	\$ 37,134	\$ 39,410
Other JC	\$ 26,093	\$ 38,834	\$ 40,871
Russellville	\$ 33,786	\$ 38,609	\$ 39,450
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Mobility

Mobility patterns also have an important impact on housing markets. The chart below tracks mobility by age cohort, showing that younger people tend to move more often (and create more demand for housing) than older people).

Chart 3



The chart also compares mobility among renters (blue/green) versus homeowners (red/brown). Not surprisingly, homeowners are less likely to move on a regular basis, since they have a longer-term financial investment in their homes. Finally, the chart compares mobility rates between Clarksville, other parts of Johnson County, and the Russellville area. In general, Johnson County residents tend to be the least mobile, while young Russellville residents are slightly more mobile than their neighbors.

Housing Demand

The market analysis forecasted housing demand within the broader Clarksville market area and among key inflow cohorts including retirees and those who may be motivated to move to the area for work. The analysis determined that there will be nearly 5,200 householders moving up or down within the market area over the next five years, due to reasons related to life changes, change in income, or other factors. Added to this number will be several hundred new households in the market, generated by job growth (relocations) or other factors that bring net new households to the market area.

The Clarksville area is projected to add about 370 jobs over the next five years, including added staff at the University of the Ozarks which is likely to generate downtown-related housing demand. Finally, retirement to the area will account for another 15 to 20% of growth in households over the next five years. Job growth, movement within the market, and retirement will generate demand for housing within the market. In addition, there will be a need for replacement housing where there are demolitions due to fire or damage, accounting for an estimated 0.5 to 1.5% of the overall housing stock.

Competitive Framework

Portions of Johnson County outside of the city of Clarksville, coupled with new development in Russellville, are among the locations most likely to compete for housing in the Clarksville market. River Valley’s new homes in Russellville are coming on line in the \$160-170,000 range for 1,800 square-foot and 3 bedrooms, targeting the middle of the market (e.g., nuclear plant and manufacturing workers) within both Pope and Johnson counties. Local builders

claim to have been “scared away” from years of cumbersome and time-consuming approvals processes in Clarksville. But a change in administration has helped immeasurably in restoring confidence in the City’s ability to process and approve building permits. Still, builders claim that land prices are too high to ensure profitability at affordable prices within Clarksville as compared with lower-priced county land. Either way, there is a need for pro-active engagement with regional developers to attract and recruit them into the Clarksville market to help the city capture its “fair share” and more of the market demand.

Development Potential

The analysis determined the city’s development potential within the competitive framework for both for-sale and rental housing over the next five years.

Rental Housing Potential

The market analysis forecasted potential for about 130 to 235 rental units in Clarksville over the next five years. This number includes up to 60 affordable “workforce” housing units to meet demand generated by those households with incomes below the Area Median Income (AMI) for Johnson County. Overall rental housing potentials in Clarksville are summarized below.

Table 10. RENTAL HOUSING POTENTIALS, CLARKSVILLE, 2018-2023			
Rent Range	Area Capture		Market Rate
	Moderate	High	
\$ 300	13	17	-
\$ 500	9	13	-
\$ 600	13	21	
\$ 700	20	36	
\$ 800	12	22	17
\$ 1,100	18	36	27
\$ 1,200	13	31	22
\$ 1,500	4	14	9
Sub-Total	102	190	75
<i>Workforce</i>	34	58	
Retirement	11	14	12
Job Induced	15	30	25
TOTAL	128	234	112
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

The number also includes up to about 15 retirement rental units and 30 “job-induced” units that would be generated by new employment growth specifically within Clarksville.

Rents. A significant amount of the rental demand would be for units renting in the \$600 to 700 range, but there is also demand for up to about 60 higher-end rentals in the \$1,000 to \$1,200 range. A significant amount of this higher-end rental demand would be generated by relocating workers, including faculty and staff of the University of the Ozarks as well as professional workers at other businesses in the city.

For-Sale (Homeownership) Housing

The market analysis also forecasted demand for development of 85 to 150 for-sale housing units in Clarksville over the next five years. This number includes about 50 to 60 workforce units for those households making less than the median housing income for Johnson County.

Table 11. FOR-SALE HOUSING POTENTIALS, CLARKSVILLE, 2018-2023			
Price Point	Area Capture		Market Rate
	Moderate	High	
\$ 106,250	14	17	-
\$ 156,250	8	11	-
\$ 185,100	5	10	
\$ 218,750	4	10	7
\$ 247,500	5	11	8
\$ 288,750	3	6	4
\$ 367,500	7	15	12
Sub-Total	46	80	31
Retirement	14	31	22
Job-Induced	24	40	36
TOTAL	84	151	90
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

The potential also includes up to 40 job-induced units and 30 retirement housing units. Nearly all of these markets would be accommodated in market-rate housing.

Housing Prices. There is significant workforce housing demand at the lower-end of the market around \$100,000, but there is also demand at various price levels up to a maximum of about \$365,000. In general, housing priced in the \$150,000 to \$225,000 range will find the middle of the market. Retirees and those relocating from other parts of the country for jobs are most likely to spend at the upper-end of these ranges, since they will have typically arrived from larger or more expensive markets. That being said, many retirees are attracted to the Tri Peaks Region due to its relative affordability. And a growing share of retirement demand is being generated by existing residents of “flatland” portions of Arkansas (e.g., the Delta).

Section 3. RETAIL MARKET ANALYSIS

Findings from a Retail Market Analysis for Clarksville are provided in this section. This analysis examined existing retail market conditions, inventory & supply, sales trends, key sub-markets, and indicators of the existing market. Interviews were conducted with a sample of businesses. An inventory of commercial space and use was developed as a baseline. The Clarksville Retail Trade Area is defined and household demographics projected for this trade area. The market analysis forecasted household and student retail expenditure potentials and demand by specific type of retail, restaurant, entertainment, or personal service business. The competitive framework was examined. Finally, the warranted economic potential for new development or reuse of existing space for commercial uses was then determined based on the city's positioning and capture within the competitive market.



Existing Retail Inventory and Sub-markets

Clarksville has an estimated supply of about 750,000 square feet, based on an inventory completed for this analysis of commercial buildings and a review of assessment records for about 70% of those buildings. Much of the city's commercial space is concentrated in downtown or in the Main Street (east/west) and South Rogers Street Corridors, although there are several smaller commercial corridors including South Crawford and West Clark Streets. A discussion of the retail/commercial uses within these nodes and corridors is provided below.

Downtown Clarksville

A detailed inventory was conducted of all buildings in downtown Clarksville, and interviews were also conducted with a number of business operators in the downtown area. Because downtown is the heart of the city and projects its image and brand to residents, visitors, and prospective businesses, it is important to focus on ways to strengthen the downtown core.

Downtown has a total of 138,000 square feet of retail/commercial use in 40 spaces, mostly on the ground-floor of older buildings. Most of downtown's retail activity is concentrated within several blocks along Main Street, although there is some commercial use on several side streets such as Fulton. Downtown is the location of the Johnson County Courthouse and various county agencies (along with being the home of municipal government and utilities), and therefore generates regular business from government-related activity. The Chamber of Commerce is based in the old Depot building. Otherwise, downtown has surprisingly few civic anchors. Spadra Creek and the associated greenway intersect with downtown at Main Street, providing some open-space links to the downtown area.



Nearly two-thirds of downtown's first-floor commercial space is used for shopper's goods stores – businesses that sell products like furniture or clothing for which consumers comparison shop. In general, the downtown shopper's goods category is characterized by a handful of furniture stores, used and discount general merchandise stores, several shoe and apparel stores, some farm supply and equipment dealers, three auto supply stores, and a few other retail businesses. Fred's Super Dollar anchors both the shopper's goods and convenience categories by offering food, pharmacy, and discount merchandise.

Just about 7% is in use for convenience goods – businesses that sell items for immediate consumption or are located in a convenient location for consumers. However, downtown convenience seems to be focused mainly in florists and pharmacies. Fred's Super Dollar is a relatively small discount chain, but serves as an important anchor in the

downtown area because it is the only general merchandise store, has some convenience food, and offers a full-service pharmacy. There is no large supermarket in the downtown area, so Fred’s is one of the few downtown sources of food and general merchandise. Another 5% of the downtown space is in personal services (e.g., hair or nail salons, tailoring, etc).

About 5.0% of the commercial space is in restaurants. Liquor by-the-drink is not allowed in Johnson County, so there are no bars in Clarksville. Nor are there any entertainment venues in downtown Clarksville, a serious gap in the offering of a downtown area.

Table 12. RETAIL BUSINESS SPACE BY CATEGORY, DOWNTOWN CLARKSVILLE, 2017			
Category	Number	Sq. Feet	Percent
Convenience	4	9,852	7.1%
Shoppers Goods	20	89,490	64.8%
Eating & Drinking	3	6,594	4.8%
Entertainment	-	-	0.0%
Personal Services	7	8,225	5.0%
Vacant	<u>6</u>	<u>23,865</u>	<u>17.3%</u>
TOTAL	40	138,025	100.0%
Sources:	Johnson County Assessor, businesses, and Randall Gross / Development Economics.		

National or regional chains located in the downtown area include Fred’s Super Dollar, Western Auto, Auto Zone, and Sears, which generally represent aging brands with a stagnant or declining presence. Several local businesses provide a basis for establishing more destination draw for the downtown area. Among these local businesses are Arkansas Cycle Works, Joyful Noise Guitar Center, La Herradura, Family Shoe Store, Clarksville Feed & Supply, Bean Furniture, Sexton Furniture, Fat Dawgz BBQ, America’s Wings, and Paperwhite Clothing, among others. While Paperwhite is a small, locally-owned store, it generates a substantial share of its business from national online sales, while most of the other downtown businesses are still highly dependent on local households.

East/West Main Street

The Main Street corridor, east and west of downtown, has a total of about 108,000 square feet of commercial use. Of this amount, about 60% is in shopper’s goods and 13% in convenience goods stores.

Just about 7% is in eating & drinking and 7% in personal service. Again, there is no active entertainment use. Highway 64 (Main Street) East is oriented towards a mix of highway commercial, auto service, budget motels, and repair uses out towards the airport and Lamar. Highway 64 (Main Street) West has more shopper’s goods, banks, fast food and a handful of specialty stores like the Asian Food Market, Antiques Plus, and the Shabby Pig clothing store.

Table 13. RETAIL BUSINESS SPACE BY CATEGORY, MAIN ST CORRIDOR, CLARKSVILLE, 2017			
Category	Number	Sq. Feet	Percent
Convenience	7	13,838	12.8%
Shoppers Goods	17	64,843	59.8%
Eating & Drinking	5	7,350	6.8%
Entertainment	-	-	0.0%
Personal Services	4	6,380	5.9%
Vacant	<u>9</u>	<u>16,000</u>	<u>14.8%</u>
TOTAL	42	108,411	100.0%
Sources:	Johnson County Assessor, businesses, and Randall Gross / Development Economics.		

South Rogers Street

South Rogers is the city’s primary commercial corridor. This strip has about 430,000 square feet of retail/commercial use. More than 77% is in shopper’s goods stores, with 8% in restaurants, and less than 5% in convenience goods.

Table 14. RETAIL BUSINESS SPACE BY CATEGORY, SOUTH ROGERS STREET, 2017			
Category	Number	Sq. Feet	Percent
Convenience	10	19,944	4.6%
Shoppers Goods	24	332,866	77.4%
Eating & Drinking	12	34,952	8.1%
Entertainment	-	-	0.0%
Personal Services	6	7,709	1.8%
Vacant	<u>13</u>	<u>34,791</u>	<u>8.1%</u>
TOTAL	65	430,261	100.0%
Sources:	Johnson County Assessor, businesses, and Randall Gross / Development Economics.		

A very small share of the uses here are in personal services and there are no major entertainment uses, although there are recreation-oriented uses (like bowling alley, martial arts, and fitness centers) in this corridor. Again, the corridor is dominated by highway-oriented commercial use including fast-food restaurants, gas stations, discount tobacco stores, auto parts, nail salons, and the like. There are several anchor “big box” stores in the corridor including the 156,000 square-foot Walmart Superstore and the 52,600 square-foot Atwoods Ranch & Home Store. Several motels also anchor the corridor, including the Executive Inn, Best Western, Super 8, and Quality Inn.



Among the larger strip shopping centers in the corridor is the 48,600 square-foot Clarksville Super Center (anchored by a 12,200 square-foot Stage store, along with Factory Connection and Dollar General). The 26,000 square-foot Clarksville Plaza Shopping Center houses national brands including CATO, Dollar Tree, and Game Stop. There are also smaller strip centers that dot the landscape of this corridor. In general, many of the chain stores in the corridor and citywide represent discount brands.

Other Areas

The South Crawford Street area offers a small but important 60,000 square-foot cluster of convenience and other retail uses, anchored by the 34,400 square-foot Harvest Food Store. Importantly, this store is one of the city’s only large supermarkets and one of only a handful of food stores outside of Walmart. The area (along with Interstate Drive near I-40) also includes a Family Dollar, Subway, and several gas and tobacco/convenience stores. The Johnson County Senior Center and the First Baptist Church are located in this corridor.

West Clark Street near I-40, offers the city’s main source of commercial entertainment, the Clarksville Cinema. This 13,000 square-foot movie theater shows first-run productions. The 10,600 square-foot Hoyles Western Wear, Hardee’s, and Danielle’s Bridal are also located in this small 34,000 square-foot node. Holiday Inn Express and Hampton Inn help anchor the node as a visitor hub along I-40 and the 335,000 square-foot Hanes plant is an important employment generator.

Summary of the Overall Business Mix

Overall, Clarksville seems to have a higher-than-average number of western apparel and farm supply stores. Otherwise, the city’s overall business mix is clearly oriented to discount merchandising strategies and there is a lack of destination retail, dining, and entertainment. There appears to be little effort to market to destination tourism other than for pass-through travelers along I-40. There are a few specialty businesses, but they represent a relatively small share of the overall mix. Residents have expressed a desire for more dining establishments and other retail businesses.

Market Indicators

Information is provided on key retail market indicators, based on the field reconnaissance and building inventory, assessment records, and interviews with businesses in the key commercial nodes and corridors.

Vacancy

There is a total inventory of about 75,000 square feet (74,656) of vacant commercial space in the city. This amount yields a vacancy rate of 10.3% overall, which is about twice of where it should be under ideal market conditions. Some of the vacancy relates to the condition of retail space and functional obsolescence, but much of this issue is market related. Vacancy is highest in the downtown area, at 17.3% (or about 24,000 square feet, excluding several non-rentable buildings). Downtown suffers from both a lack of destination marketing activity as well as functional issues with the physical building stock, where retail space does not always meet the standards (such as floor plate and layout) required for modern retail operations.

But vacancy is also high outside of downtown in the Main Street corridor, at 14.8% (16,000 square feet). Here a part of the problem is the replacement of U.S. 64 by I-40 as the main highway through the city. I-40 essentially bypasses the older commercial areas along Main Street, including downtown. By comparison, average daily traffic counts (ADT) along West Main reach approximately 9,600, while ADT on I-40 approach 30,000. Some of the competitive value of retail land along U.S. 64 has been lost to big box stores and areas that benefit from interstate highway exposure. Not surprisingly, vacancy along South Rogers is somewhat lower, at about 8%, and the corridor has relatively little vacancy in areas most proximate to the interstate. South Crawford and West Clark (which also benefits from exposure to I-40) have little vacancy.

Rents

Rents are difficult to pinpoint, since many businesses own or franchise their stores. But rents tend to list for as low as \$3.50 per square foot and range up to about \$8.50 per month on free-standing properties (and up to \$12.00 on some smaller stores). Rents in shopping centers tend to be higher. Even where rents are relatively low, retailers tend to face challenges especially downtown with issues such as building conditions (e.g., flat roofs that contribute to leakage problems), parking, rehabilitation constraints (e.g., no/few incentives like tax abatements) and others.

Construction

There has been limited new retail construction or absorption of new space over the past 20 or more years. The average age of retail buildings, based on a sample of those included in the inventory, is about 48 years. Within the downtown area, not surprisingly, the average commercial building age is nearly 87 years (1930). Among the newer retail spaces are the Dollar General on West Main (2012), and the Family Dollar and Sonic Drive-In on South Crawford (both built in 2012). There was a flurry of commercial activity in the early 2000s, with the construction in 2003 of the Walmart Superstore, followed in 2004 by Clarksville Plaza and other spin-off.

Retail Trade Area

Clarksville should draw about 70-80% of its retail expenditures from within a natural trade area that includes the city of Clarksville and surrounding Johnson County, as well as from southern Newton County and northern Logan County (Paris, Scranton). In reality, Clarksville's retailers currently draw a higher share of their business from within the trade area, with very limited "destination" inflow from outside of the trade area. That being said, the city's retailers do see some inflow from portions of Pope (Russellville) and Franklin (Ozark) counties. For the purposes of this market analysis, the Clarksville Retail Trade Area includes the following sub-areas:

- Clarksville
- Rest of Johnson County
- Southern Newton County (Census Tract 1802)
- Northern Logan County (Census Tracts 9501, 2, and 3)

As noted above, Clarksville also draws inflow from Pope (Russellville) and Franklin (Ozark) counties as well as from tourists and travelers along I-40, U.S. 64, and the Ozark National Forest. Aside from trade area households and tourists, students from the University of the Ozarks are also generate retail demand in the city.

Demographic Trends and Forecasts

Demographic trends and forecasts were analyzed for the trade area and its various component parts. The following information focuses on basic trends in population, households, and household income within the trade area.

Demographic Trends

The trade area has seen overall growth since 2010, but that growth has been uneven. Population in Clarksville and the remainder of Johnson County increased by 4.2% and 2.4%, respectively. Both the city and county also saw household growth during the seven –year period through 2017. However, population and households declined in

surrounding areas of Newton and Logan counties. The population of southern Newton County fell by 7.2%, while that of northern Logan County fell by 3.7%. Meanwhile the population base in nearby Russellville increased by 5.9%.

Household incomes increased modestly in Clarksville since 2010, at a rate of about 1.2% per year, while incomes in other parts of Johnson County increased dramatically (about 4.8% per year, on average). Some of this income growth may relate to the development of newer, higher-priced housing in portions of the county outside of Clarksville. Average household incomes stood at an estimated \$45,100 in Clarksville and \$55,600 in other parts of Johnson County in 2017. Overall demographic trends are summarized by sub-area in the Appendix.

Demographic Forecasts

These trends are generally expected to continue, albeit at a slower pace, over the next five years. Clarksville and Johnson County will see modest growth in population, households, and income through 2022. Clarksville’s population is expected to increase by about 250, while Johnson County (outside of Clarksville) will add about 400 people. Altogether, Johnson County including Clarksville will add about 200 households. Southern Newton and northern Logan counties will continue to lose population and households through 2022, but at a slower pace. Incomes in those areas will stabilize and actually grow slightly. Russellville will continue to see growth in population, households, and income as that city’s economy continues to strengthen.

Overall demographic forecasts are also summarized in the Appendix. In general, trade area population and households will each increase overall by about 1.0% to 42,100 and 16,600, respectively. Incomes will increase by about 1.5% to an average \$52,200.

Retail Demand

Overall retail demand within the trade area was forecasted through 2022 based on total personal income and the share of household income spent on retail goods and associated services or retail expenditure potential.

TPI

Total household income in the trade area is \$847.1 million at present, and is expected to increase to \$868.1 million by 2022, for an increase of approximately \$21.1 million or 2.5%.

Table 15. TPI FORECASTS, CLARKSVILLE RETAIL TRADE AREAS, 2017-2022				
Trade Area	TPI (000)		2017-2022 Change	
	2017	2022	Amount	Percent
A-Clarksville	\$ 160,647	\$ 165,842	\$ 5,194	3.2%
B-Johnson	\$ 363,404	\$ 381,677	\$ 18,273	5.0%
C-S Newton	\$ 80,219	\$ 79,866	\$ (354)	-0.4%
D-N Logan	\$ 242,776	\$ 240,759	\$ (2,017)	-0.8%
Total	\$ 847,046	\$ 868,143	\$ 21,097	2.5%
Notes:	Total personal income (TPI) expressed in thousands of constant 2016 dollars.			
Source:	Randall Gross / Development Economics.			

This disposable income forms the basis for household retail expenditures that can be captured within the trade area.

Household Expenditure Potential

Total trade area household retail expenditure potential is estimated at \$660.5 million, and is forecasted to increase by \$15.4 million to \$675.9 million by 2022. This amount represents an increase of 2.3% in total retail expenditure potential or retail demand within the trade area over the next five to six years.

Student-Generated Demand

University of the Ozarks has enrollment of 686, a 17% increase over the past four years. Enrollment is projected to reach 900 within the next five years, with a goal of increasing the school’s retention rate. Employment would also be likely to increase from the current level of about 140. Students and staff will generate demand for retail goods and services, restaurants, and entertainment.

Table 16. STUDENT-GENERATED DEMAND, DOWNTOWN CLARKSVILLE		
Factor	Amount	Assumption
Student Population	900	
On Campus	560	
Student Expenses	\$ 34,450	
Tuition	\$ 23,750	
Room/Board	\$ 7,300	
Remainder	\$ 3,400	
Total Expenditures	\$ 1,904,000	
Capture	\$ 1,066,240	56%
Demand	5,331	\$ 200.00
Sources:	University of the Ozarks and Randall Gross / Dev. Economics.	

Based on the school’s enrollment target, it is likely that University of the Ozarks students would generate demand for up to 10,000 square feet of retail space, with about 5,000 to 6,000 square feet within the downtown area. Books, live music, eating & drinking establishments, and convenience store food are among the student’s likely types of expenditures.

Tourism-Generated Demand

Clarksville is marketed as part of the Arkansas River Tri-Peaks Region for tourism. Local hotels report that about 30% of their business is tourism-related, while 40% is generated from corporate visitors, 20% from weddings and other events, and 10% from other sources.

The city’s tourism is sometimes described as being driven by “intentional” visits relating to mountain biking trips, motor sports, car shows, and other activities. Among the tourism sites are the Catalpa Swinging Bridge, Oark General Store, Marina/fishing and hunting activities, fall colors tours (Route 103) and the Ozark National Forest.

The U.S. Forest Service estimated a total of 2,796,000 visitors to the Ozark-St. Francis National Forest in 2015, up by about 2.2% per year since 2010. Attendance increased dramatically between 2005 and 2010, but attendance growth has slowed since then. A total of 563,000 or about 20% comprised overnight visitors at forest sites. However, overnight visits were down by 4.0% per year since 2010.

Overall, tourism should be generating at least \$19.0 million in spin-off retail, restaurants and entertainment in Clarksville. Based on interviews with businesses, the city is not currently capturing the full amount of this potential target market. The forest tourism alone could generate almost 75,000 square feet of retail space.

Table 17. TOURISM-GENERATED RETAIL POTENTIAL, CLARKSVILLE		
Category	Factor	Total
<u>OT Visitors</u>		2,796,000
<u>Total Spend</u>	\$ 257.14	\$ 718,963,440
-		
Restaurants	\$ 49.35	\$ 137,969,084
Retail Trade	\$ 102.80	\$ 287,441,583
Entertainment	\$ 3.47	\$ 9,706,006
<u>Clarksville Capture</u>		
Restaurants	5%	\$ 6,898,454
Retail Trade	4%	\$ 11,497,663
Entertainment	12%	\$ 1,164,721
<u>Demand (Square Feet)</u>		
Restaurants	\$ 600	11,497
Retail Trade	\$ 220	52,262
Entertainment	\$ 110	10,588
TOTAL		74,348
Source:	Randall Gross / Dev. Economics.	

Competitive Framework

The competitive framework was defined in order to assess Clarksville’s capture of retail demand within the trade area and likely inflow from outside of the trade area. A focus on the competition for sub-markets like downtown Clarksville was also provided. The analysis determined that much of the city’s competition is generated from the east and west of the city in Russellville, Ozark, Fort Smith, Little Rock, and points in-between along I-40. Much of this competition comes in the form of destination shopper’s goods, restaurants, and entertainment. Because Johnson is a dry county, residents of Clarksville and surrounding communities (as well as many tourists) are likely to drive to larger cities for dining and entertainment. When tourists are drawn to larger cities, they will also spend more money there on destination shopping for goods and services. Thus, there is market “leakage” from Clarksville to other communities, in part due to the lack of dining, destination shopping, and entertainment options.

Clarksville Retail Potentials

Clarksville’s retail market potentials were forecasted based on two different scenarios. The first scenario assumes a baseline “do nothing” approach without any pro-active retail marketing or business recruitment efforts. The second scenario assumes that there would be a “destination” marketing strategy implemented with a much more aggressive effort to pro-actively recruit businesses, provide incentives and assistance to business, and enhancing tourism and other destination marketing efforts.

Baseline Scenario

Under the “do nothing” approach, Clarksville will continue to have an over-supply of retail space of about 50,000 to 70,000 square feet.

Table 18. SUMMARY RETAIL POTENTIALS BY USE CLARKSVILLE, 2017 AND 2022				
Type of Good	Gross Demand (SF)		Existing Uses	Warranted Demand
	2017	2022		
Convenience	112,283	116,655	88,152	28,503
Shoppers Goods	433,403	449,682	495,598	(45,916)
Eating/Drinking	69,788	71,445	53,148	18,297
<i>Limited Service</i>	30,918	31,647	26,486	5,161
<i>Full-Service</i>	31,673	32,424	26,662	5,762
Entertainment	8,621	8,944	-	8,944
Pers. Services	34,661	35,917	22,313	13,604
TOTAL	658,757	682,642	659,211	23,431
<i>Existing Vacant</i>			74,656	
Net New Space				(51,224)
Source:	Randall Gross / Development Economics.			

In particular, there will be an oversupply of shopper’s goods stores within key categories including furniture, garden supply, non-department store general merchandise (i.e., “dollar” stores), used merchandise, automotive dealers, florists, automotive supply, and several other categories. Even so, there would be net demand in other categories like restaurants and entertainment, home centers, groceries, and certain specialty goods stores.

Destination Scenario

In the destination marketing scenario, where there is a more pro-active effort to recruit target retail businesses, provide incentives for operation, and enhance marketing for tourism and other destination markets, then there would be potential for nearly 180,000 square feet, or about 100,000 square feet of net demand (after 75,000 square feet of vacant space is filled).

Table 19. SUMMARY DESTINATION RETAIL POTENTIAL BY USE CLARKSVILLE, 2017-2022				
Type of Good	Gross Demand (SF)		Existing Uses	Warranted Demand
	2017	2022		
Convenience	137,445	144,228	88,152	56,077
Shoppers Goods	467,850	484,650	422,456	62,193
Eating/Drinking	76,591	79,581	53,148	26,433
<i>Limited Service</i>	33,016	34,212	26,486	7,726
<i>Full Service</i>	34,348	35,517	26,662	8,855
Entertainment	17,241	18,051	-	18,051
Pers. Services	35,807	37,350	22,313	15,037
TOTAL	734,933	763,860	586,069	177,791
<i>Existing Vacant</i>			74,656	
Net New Space				103,136
Note:	Assumes Pro-active Internal/External Recruitment.			
Source:	Randall Gross / Development Economics.			

In this scenario, there is significant net demand in all major categories including convenience, shopper's goods, eating & drinking, entertainment, and personal services. In particular, there would be demand for home centers, gift & novelty stores, groceries, health & personal care stores, convenience, apparel & accessory stores, various specialty stores, eating & drinking establishments, personal service, and entertainment. A detailed summary of retail potential by specific category is provided in the Appendix of this report.

Recommended Retail Mix

A recommended target retail business mix is provided below, based on the findings of the retail market analysis. The target mix is disaggregated into downtown versus more “highway-oriented” locations in the city like U.S. 64 and South Rogers Street. The recommended business mix is shown below.

Table 20. RECOMMENDED RETAIL MIX CLARKSVILLE	
Downtown Clarksville	Square Feet
Specialty Food Store	4,000
Hand-Made Jewelry/Accessories	3,500
Antiques/Home Furnishings	9,000
Musical Instruments/Lessons/Repairs	1,200
Gift & Novelty	6,000
Hobby/Toy/Games Destination	2,500
Leather Products	3,500
Sporting Goods-Camping/Hunting/Fishing	2,000
Office Supply/Shipping	3,000
Destination Restaurants	8,800
Coffee/Tea Shop	3,500
Other Restaurants	7,100
Entertainment/Recreation Venue	18,000
Health Spa/Services	10,000
TOTAL	82,100
Highway-Oriented	
Specialty Grocery/Health & Personal Care	35,000
Convenience	8,500
Home Furnishings	10,000
Home Center	90,000
Limited Service Restaurants	7,700
TOTAL	151,200
Source:	Randall Gross / Development Economics.

Downtown

Downtown is seen as the core node for a “destination” marketing strategy that builds on Clarksville’s unique characteristics to appeal to destination shoppers and tourists. There is an assumption within this analysis that Clarksville would follow in the footsteps of Russellville and pursue liquor-by-the-drink status, at least within a confined area of downtown (such as by allowing a restaurant with a bar or brewpub establishment). By doing so, it has been shown time and again that downtown areas will see an immediate uptick in economic activity. In general, restaurants generate a substantial share of their profit margin from wine and spirit sales, so by allowing those sales, there is a stronger likelihood

that downtown restaurants can survive and prosper. This is especially true in a city like Clarksville that has a growing student population on downtown's doorstep. The City can, again like Russellville, control the licensing of restaurants that sell liquor, thereby reducing many of undesirable impacts.

In addition to restaurants, the target mix includes a substantial entertainment opportunity. Downtown needs a destination entertainment activity, such as a commercial theater, to help capture a broader share of the regional market base. Specialty businesses including those that sell high-end, hand-crafted merchandise, are more likely to thrive through a destination marketing strategy that promotes them collectively rather than having individual businesses try to survive as "islands" within the downtown. Gift, novelty, sporting goods, and other businesses will appeal to the tourist and recreational visitor that is most likely to visit the area's many natural areas for recreational purposes.

Highway Corridors

The highway corridors already have a diverse mix of typical suburban highway-oriented retail commercial businesses. However, there are several gaps that can help strengthen this mix, including home centers and home furnishings stores, specialty grocery, convenience stores, and limited service restaurants. The latter are likely to help the city capture more of the pass-through interstate traffic and related retail sales. There are other strategies that can help enhance the physical quality of the city's highway corridors and improve their overall marketability. Those strategies are discussed later in this plan as part of the strategic recommendations for implementation.

APPENDIX

Table A1. DEMOGRAPHIC TRENDS, RETAIL TRADE AREAS, CLARKSVILLE, 2010-2017				
Factor	2010	2017	2010-2017 Change	
			Number	Percent
<u>Trade Area A-Clarksville</u>				
Population	9,178	9,561	383	4.2%
Households	3,455	3,564	109	3.2%
HH Income	\$ 41,540	\$ 45,075	\$ 3,535	8.5%
<u>Trade Area B-Johnson (Remainder)</u>				
Population	16,362	16,750	388	2.4%
Households	6,357	6,538	181	2.8%
HH Income	\$ 41,484	\$ 55,583	\$ 14,099	34.0%
<u>Trade Area C-S Newton</u>				
Population	4,253	3,947	(306)	-7.2%
Households	1,864	1,773	(91)	-4.9%
HH Income	\$ 34,178	\$ 45,245	\$ 11,067	32.4%
<u>Trade Area D-N Logan</u>				
Population	11,897	11,454	(443)	-3.7%
Households	4,740	4,592	(148)	-3.1%
HH Income	\$ 50,703	\$ 52,869	\$ 2,166	4.3%
Note:	Income expressed in constant 2016 dollars.			
Sources:	Claritas and Randall Gross / Development Economics.			

Table 2A. DEMOGRAPHIC FORECASTS, RETAIL TRADE AREAS, CLARKSVILLE, 2017-2022				
Factor	2017	2022	2017-2022 Change	
			Number	Percent
Trade Area A-Clarksville				
Population	9,561	9,811	250	2.6%
Households	3,564	3,646	82	2.3%
HH Income	\$ 45,075	\$ 45,486	\$ 411	0.9%
Trade Area B-Johnson (Remainder)				
Population	16,750	17,147	397	2.4%
Households	6,538	6,704	166	2.5%
HH Income	\$ 55,583	\$ 56,933	\$ 1,349	2.4%
Trade Area C-S Newton				
Population	3,947	3,843	(104)	-2.6%
Households	1,773	1,745	(28)	-1.6%
HH Income	\$ 45,245	\$ 45,768	\$ 523	1.2%
Trade Area D-N Logan				
Population	11,454	11,296	(158)	-1.4%
Households	4,592	4,540	(52)	-1.1%
HH Income	\$ 52,869	\$ 53,031	\$ 161	0.3%
Note:	Income expressed in constant 2016 dollars.			
Sources:	Nielsen & Randall Gross / Development Economics.			