An Urban Land Institute
Advisory Services Panel
September 2012

Niagara Falls
New York
About the Urban Land Institute

- The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.

- ULI is a membership organization with nearly 30,000 members, worldwide representing the spectrum of real estate development, land use planning and financial disciplines, working in private enterprise and public service.

- What the Urban Land Institute does:
  - Conducts Research
  - Provides a forum for sharing of best practices
  - Writes, edits and publishes books and magazines
  - Organizes and conducts meetings
  - Directs outreach programs
  - Conduct Advisory Services Panels
The ULI Advisory Services Program

- Since 1947
- 15 - 20 panels a year on a variety of land use subjects
- Provides independent, objective candid advice on important land use and real estate issues
- Process
  - Review background materials
  - Receive a sponsor presentation & tour
  - Conduct stakeholder interviews
  - Consider data, frame issues and write recommendations
  - Make presentation
  - Produce a final report
Sponsors and Primary Stakeholders

- Empire State Development Corporation / USA Niagara Development Corporation
- National Grid
- City of Niagara Falls
- Niagara County Community College
The Assignment

• The ULI Panel was asked to consider and evaluate potential development scenarios for the reuse of the remaining 200,000 SF of space within the former Rainbow Centre Mall
  – Market and Economics
  – Design and Planning
  – Implementation
The Panel

Chair
Hon. Glenda Hood

Panelists
Monte Richey
Nancy Cappola
Kathleen Rose
Charles Johnson
Bill Clarke
David Hancock
John Orfield

Staff
Tom Eitler
Caroline Dietrich

Student Intern
Julia Triman
• Nature and Heritage
• Hospitality and Tourism
• Culinary and Artisanal Foods
Market & Economic Analysis

Legacy

- Power of the River
- Industry
- Urban Renewal
- Reputation
- Well Studied
Market & Economic Analysis

Market Reality – Demographic Snapshot


% High School Graduate:
- Market Area: 40.9%
- U.S.: 29.5%

% Bachelor's Degree +:
- Market Area: 16%
- U.S.: 26.7%

Age Distribution:
- Percent by Age Group (2000 vs. 2010)
Market & Economic Analysis

Key Themes – Place & People

- Natural assets
- Agriculture/food
- History
- Industrial history
- Integrate & reconnect…
  - People
  - Place
  - Assets

- Eco-Tourism
- Agri-Tourism
- Heritage Tourism
Market & Economic Analysis

Regional Job Growth/Decline

• + Educational & health
• + Manufacturing
• + Natural resources, mining
• - Professional & business
• - Leisure & hospitality
• - Financial

Key Drivers & Employers

• Tourism
• Food & Beverage
• Medical/Healthcare
Market & Economic Analysis

The Customers

- Residents
  - Trade areas: 10, 15 & 30 Minute Drive Times
  - 15 Minutes: 2015 estimated population 109,638
  - 30 Minutes: 2015 estimated population 754,809
  - Tapestry Characteristics
Market & Economic Analysis

Sports & Leisure Potential

- Bowling
- Fishing (fresh water)
- Walking for exercise
- Participated in weightlifting/exercise class
- Attended movies
- Attended a music performance
- Went to a bar/night club
- Read/purchased a book
- Purchased a children’s toy/game
Market & Economic Analysis

Industry Sectors

- Education
- Health Services
- Natural Resources (parks)
- Scenic & Sightseeing
- Ground Transportation
- Clothing & Accessories
Market & Economic Analysis

Market Opportunity

- Retail - up to 200,000 s.f.
- $30 million annual food/beverage
- Specialty Foods & Culinary
- Drinking Places
- Music & Books
- Sporting Goods
- Fitness
- Personal Service (spa/salon)
Market & Economic Analysis

The Customers

- Visitors
  - Day Trips
  - Overnight Stays

Activities of Special Interest

Activities and Experiences in the Region Apart From Shopping
Market & Economic Analysis

Recommended Program - 1st Floor – 74,500 +/- s.f.

- Retail & Entertainment
  - Destination, anchor
  - Food as Art
  - Recreation – bowling/theatre

- Place-Making
  - Attraction/public realm
  - Movement of people
Market & Economic Analysis

Recommended Program – 2nd Floor – 74,500 +/- s.f.

- Educational/Cultural
  - Education expansion
  - Education/cultural addition
- Health & Fitness
  - Spa
  - Yoga
  - Exercise
Market & Economic Analysis

Returning to Economic Prosperity

- Come Back to Niagara! – a new experience…
- Attract residents & visitors to downtown…
- Recruit local innovators & entrepreneurs…
- Local workforce become your greeters…
- Visitors become your global ambassadors…
Recommended Development Product

A mix of Educational, Cultural and Entertainment Uses

- Criteria
  - Matches market potential
  - Multi-seasonal
  - Attractive to visitors and residents
- Market Potential “downtown area” - 200,000 square feet
- Already available - Up to 66,000 sf
- Amount of space in Rainbow Centre Mall after aesthetic and functional improvements - 74,500 sf on each level
- Recommend use of lower level for retail and culture, and upper level for educational uses
- If 66,000 square feet already available + 74,500 leaves 59,500 square feet of space to go elsewhere in the market
- A productive lower level Rainbow Centre Mall serves as the anchor for the rest of the retail surrounding the Mall
### How Does The Space Layout?

**Educational Upstairs and Entertainment Retail Downstairs**

<table>
<thead>
<tr>
<th>Rainbow Centre Mall Program</th>
<th>Fresh Food Market/Showcase</th>
<th>42,000</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Small Format Bowling Alley &amp; Restaurant</td>
<td>20,000</td>
</tr>
<tr>
<td></td>
<td>Drafthouse Theatre (4 screens)</td>
<td>12,500</td>
</tr>
<tr>
<td></td>
<td><strong>Subtotal</strong></td>
<td><strong>74,500</strong></td>
</tr>
<tr>
<td>First Floor (retail/entertainment/culture)</td>
<td>Educational - expansion</td>
<td>20,000</td>
</tr>
<tr>
<td></td>
<td>Educational - new</td>
<td>34,000</td>
</tr>
<tr>
<td></td>
<td>Exercise/Fitness</td>
<td>12,000</td>
</tr>
<tr>
<td></td>
<td>Spa/Yoga</td>
<td>8,500</td>
</tr>
<tr>
<td></td>
<td><strong>Subtotal</strong></td>
<td><strong>74,500</strong></td>
</tr>
<tr>
<td>Second Floor (educational/health)</td>
<td>Total</td>
<td>149,000</td>
</tr>
</tbody>
</table>
Recommended Development Product

A mix of Educational, Cultural and Entertainment Uses

- Retail + Entertainment + Culture - What retail offers that and fits with the adjacent Culinary Institute and its small incubator?

“Farmers/Artisan Foods/Organics Marketplace”

- High volume visitor activity
- Draw for the regional US and Canadian resident base
- Alternative market for the local resident population
- Entrepreneur / incubator opportunities

42,000 square feet, which provides sufficient space for community kitchen and communal tables
Recommended Development Product

A mix of Educational, Cultural and Entertainment Uses

- Retail + Entertainment + Culture - What retail offers that and fits with the adjacent Culinary Institute and its small incubator?

Entertainment Retail

- Small format bowling alley and restaurant/lounge
- Four screen Drafthouse Theater
  - Serves visitors while in the market- limited options now on US side
  - Matches local demographics
  - Adds depth of activity for downtown area residents
  - Theater has multiple roles
    1. Daytime- Niagara area themed movies
    2. Night time- first and second run movies
    3. Broadcast opportunities
    4. Venue for folk and storytelling programming

- Bowling alley and restaurant/lounge- 20,000 square feet
- Theater- 12,500 square feet
Recommended Development Product

Expanding Education Jobs and Student Activity

*Expansion potential- a good plan must allow for expansion of existing and future users*

*New, consistent educational opportunities that fit*

- Hospitality curriculum
- Film and communications education
- Art education
  - Brings more people to downtown on 24/7 basis
  - Adds critical mass to downtown education cluster
  - Adds youth activity in area
  - Can serve as resource to training Seneca Casino and other hospitality employees
  - Lower retail level provides programming opportunities for all these educational categories
- Upper level educational uses- 54,000 square feet
Recommended Development Product

Support Students, Area Employees and Residents

**A combined Teaching Spa, Yoga Studio and Fitness Center**

- Has commercial potential
- Serves student and employee population in the building
- Would be booked by area hotels for visitor use
- Palm Springs zoning allows local residents to use hotel exercise rooms- Similar model could be considered for residents that live in a defined area

- Educational Spa and Yoga Studio- 8,500 square feet
- Fitness Center and support areas- 12,000 square feet
Development

History of Greyfield Malls
Development

Greyfield Malls: A Common Urban Nuisance
Development

Good Urban Development

- Historic city grid of Philadelphia, Pennsylvania
Development

Welcome to the USA!
Development

Adaptive Re-use – The Opportunity
Development

Adaptive Re-use – The Opportunity

• Break up the Super Block
• Return to a Human Scale
• Soften the Building
• Introduce more Light
• Smaller tenant spaces
• Preserve parking
• Leverage other design elements of the deck
  – Flexible structure
  – Natural lighted atrium
Development

Place-making

- New Street extensions
- Pedestrian elements
- Public spaces/plazas
- Improved view corridors
## Development

- Honor existing parking
  - Maximize its potential

### Parking Matrix

<table>
<thead>
<tr>
<th>Use</th>
<th>Requirements</th>
<th>Units</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bowling (parked at restaurant ratios)</td>
<td>1 per 75 sf</td>
<td>20,000 sf</td>
<td>267</td>
</tr>
<tr>
<td>Movie (parked at restaurant ratios)</td>
<td>1 per 75 sf</td>
<td>12,800 sf</td>
<td>63</td>
</tr>
<tr>
<td>Market (parked as &quot;neighborhood grocery&quot;)</td>
<td>1 per 200 sf</td>
<td>41,400 sf</td>
<td>207</td>
</tr>
<tr>
<td>Educational/Cultural</td>
<td>1 per 2 students</td>
<td>600 students</td>
<td>300</td>
</tr>
<tr>
<td><strong>Subtotal of parking generated by new demand</strong></td>
<td></td>
<td></td>
<td>837</td>
</tr>
<tr>
<td><strong>Existing Deck Commitments</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An Approximation from Interviews</td>
<td></td>
<td></td>
<td>700</td>
</tr>
<tr>
<td><strong>Total projected parking requirements</strong></td>
<td></td>
<td></td>
<td>1537</td>
</tr>
<tr>
<td><strong>Projected available parking after deck modifications</strong></td>
<td></td>
<td></td>
<td>1450 *</td>
</tr>
</tbody>
</table>

* There is a small delta which exists between the available and projected needs, but the parking assumptions used in the table are conservative, putting serious demand on spaces not otherwise committed through existing agreements. The panel believes that the actual loads will bring the deck into equilibrium and that many visitors will use alternate parking when more easily available (e.g., street parking).
• Urban Design Guidelines
• Wayfinding
• Streetscaping
• Second Level Strategies
Design

Falls District Diagram
Design

Overall Structure
Design

Option One Ground
Design

Option One Second
Design

Option Two Ground
Design

Option Two Second
Design

Option Two Roof
Design

Option Three Circulation Diagram
Design

Option Three Ground
Design

Option Three Second
Design

Option Three Roof
Design

Option Three
Design

Option Three
Option Three
Design

Option Three
Design

Option Three
Design

Future Development
Design

Future Development
Future Development
Design

Garage Options
Design

Garage Options
Design

Alternative Hotel
Design

Alternative Solar Panels
Implementation

- Beyond the walls of the building – urban design
- Resident serving commercial uses
  - Serve current and future residents of Old Falls, Rainbow Blvd / Buffalo Ave, Main Street
  - Food, personal services, recreational opportunities
- Mayor O’Laughlin Street
  - Importance of Renovated Mall Façade and Foreground
  - Urban improvements on Mayor O’Laughlin frontages
Implementation

- First Right Turn in the USA
  - Visual importance of corner of Renovated Mall at Niagara Street
  - Possible visitor contact point –
  - Need for façade improvements and signage
- Wayfinding
  - Culinary Institute = New Visitors
  - Renovation of mall will bring attractions and a need for wayfinding
  - Build on initial signage efforts with key locations signed at larger sizes
  - Coordinate efforts with State Park signage
- Consistent Streetscapes
  - Ensure all urban furniture on Old Falls meets standards of recent improvements
Implementation

- Expand Visitors’ Knowledge of Regional Attractions/Opportunities

- Encourage longer stays in the Niagara Falls Region
  - Most visitors leave unaware of other opportunities
    - Fort Niagara, Lewiston
    - Lower River watersports, birding
  - Start to change this with action in Old Falls area
    - Small intercept space with regional materials
    - Could have historical exhibits
    - Appropriate spaces in revitalized mall or other underutilized building
Implementation

- The Niagara Falls State Park
  - Connections
    - Important there be a clear connection between Old Falls St and State Park
    - Currently access from Old Falls St is confusing
    - Work with State Park in its planned renovations to improve this situation
  - Wayfinding
    - Opportunities with removal/downgrade of R. Moses Parkway
    - Facilitate connections from town to nature
    - Possibly utilize park wayfinding into town and vice versa
Implementation

• Strategies Regarding Nearby Buildings

• Using the Culinary Institute as a “Trigger Event”
  – Momentum of opening
  – Now focus efforts on underutilized buildings
  – Remediation, renovation, signage
  – A façade improvement program

• Programming
  – 66,000 square feet of remaining demand

• Upper Falls Street
  – Falls Street Station, 10,000 sf
  – Conference Center Frontage, 8,000 sf
Implementation

- Lower Falls Street
  - 310 Rainbow Street, 8,000 sf
  - Retail planned for Old Falls frontage
  - Design Rainbow frontage with active spaces
- Comfort Inn Building, 20,000 sf
  - Mostly empty now
  - Remodel portion fronting street; perhaps restaurant
- Wax Museum Building, 20,000 sf
  - A longer term proposition
  - Street fronting retail
Implementation
Implementation

FIRST STEPS:

• Community Meeting to Establish a Collaborative Vision
• Enforcement of Codes and Ordinances
• Request for Qualifications (RFQ)
Implementation

Request for Qualifications Process

- Evidence of Experience
- Successful Public Private Partnership (PPP)
- Experience with Desired Project Elements
- Financial Capacity
- Endure Phasing
Implementation

Ideas for Quick Wins

• Enforcement of Existing Ordinances
• Set Up Meetings to Develop a Community Vision for Redevelopment
• Announce Strategy for Rainbow Centre Mall
• Rebrand Rainbow Mall & Downtown
• Wayfinding & Signage
• Design Consistency – Branding – Color Scheme – Lighting – Benches – Banners – Trash Cans
• Upgrade Existing Street Banners
• Reclad Parking Ramps
• Develop Greeter and Ambassador Volunteer Program for Community
• Façade Improvements Along Falls Street
• Blend the Falls and Park with Good Urban Design Concepts Downtown
• Connect Residents
• Cooperation, Collaboration, Partnerships
• Strong Return on Investment
Add to the City’s Seven “Big Moves”

8. Reimagine Former Rainbow Centre Mall Site
9. Rework Old Falls Street Retail
10. Rethink and Fix the Process