

MEDICAL CENTER REGIONAL CENTER PLAN

[Exhibit 1]



SA Tomorrow Project Overview

By 2040, Bexar County's population is expected to increase by approximately 1 million people, 500,000 new jobs, and 500,000 new housing units. Planning for this growth and the next 25 years is a complex task and can be uncertain. However, San Antonio is planning boldly. We're tackling the tough issues and making the hard choices because "business as usual" isn't good enough. We're planning now to ensure that our great city captures the type of growth and economic development that is compatible with our community's vision of the future, and provides benefits to all our current and future residents. SA Tomorrow was established to implement the SA2020 vision, and includes three complementary plans: the updated Comprehensive Plan, the Sustainability Plan, and the Multimodal Transportation Plan. These plans all work in concert to guide the city toward smart, sustainable growth.

The SA Tomorrow plans prepare our community for the anticipated population and employment growth, and help us to understand what that growth will look like and how it will affect our daily lives. With a relatively fixed area available for future development, the anticipated population and employment growth will have an impact on our community's overall quality of life and livability. We also have to ask ourselves if it's now time to expand our boundaries or focus on development within the city's existing footprint. To be successful and truly address the long-term issues facing San Antonio, we as a community, need to tackle the difficult questions that arise from an honest assessment of our community's challenges and clearly state the hard choices we must make to achieve the community's vision for the future. Many of these hard choices are rooted in the fact that current trends have resulted in systems and development patterns that are unsustainable or that produce results counter to our community's stated vision and goals.

Reversing decades-old habits and changing entrenched systems is difficult. The three citywide SA Tomorrow Plans started the process for San Antonio. Now, we are working in more focused geographies across the city to implement the policy recommendations and growth patterns called for by SA Tomorrow. These Sub-Area plans — including Regional Centers, Community Areas, and Corridors — will address a range of issues such as land use; transportation and mobility; parks, trails, and open space; housing and economic development strategies; infrastructure; and urban design. This Atlas helps catalogue the most important existing conditions relevant to the Midtown Regional Center Plan. Along with extensive community input, best practices research, and expert technical analysis and advice, these findings will serve as an important input to plan recommendations and implementation and investment priorities.







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City-Wide Vision and Plans

SA2020

The SA2020 vision originated with a series of public forums in 2010 to develop goals for improving San Antonio by the year 2020. The process was a community-wide visioning effort guided by a steering committee of community leaders and representatives. In addition, thousands of San Antonians participated in the visioning process, which culminated in a detailed report, released in 2011, that outlined a bold strategic vision for San Antonio's future. The SA2020 vision provided a significant foundation for the three SA Tomorrow plans, reflecting the community's desire to support economic development and new jobs while fostering community arts, education, health and culture.



Vision 2040 was a community-driven process to update VIA Metropolitan Transit's Long Range Comprehensive Transportation Plan through the year 2040 and develop our region's vision for the future of public transportation. The Vision 2040 planning process occurred alongside SA Tomorrow and identifies a range of transit solutions to serve our region's busiest and most vibrant areas of activity, employment and housing. The plan presents various modes of transportation, and develops system alternatives to understand how transit could affect our region. By engaging the community, Vision 2040 will work to evaluate all alternatives and identify a preferred system plan that meets the transit needs of today and tomorrow.



SA Tomorrow Comprehensive Plan

The SA Tomorrow Comprehensive Plan addresses wide-ranging and interconnected citywide issues. As a long-range vision for San Antonio, the Plan provides strategic direction for decision making and community investment. Perhaps the most important task tackled by our community when crafting this Comprehensive Plan was determining where growth should be directed and encouraged, and doing so in a way that protects vital historic, cultural, social and natural resources.

If guided properly, the expected influx of new residents and jobs will enhance our city and all our residents. Planning now allows us to direct growth in a manner consistent with the community's vision and our goals for the future. The Comprehensive Plan provides an overarching framework for the physical form of San Antonio. It outlines how regional centers, corridors and neighborhoods work in concert to create the San Antonio we envision over the coming decades. In addition, 12 prototype place types offer examples of development models that can build upon and protect existing and future community assets while also creating places that are livable, inclusive and sustainable.

Policy guidance in the Comprehensive Plan is based on nine topical Plan Elements that address topics including: city growth patterns, transportation, housing, economic competitiveness, natual resources and the environment, the military, and historic preservation and cultural heritage, among others. Each Plan Element chapter includes an overview of key issues and challenges specific to the element and provides a set of goals and policies that set the direction for how our community will respond to or address the challenges before us



SA Tomorrow Sustainability Plan

The Sustainability Plan focuses on the three pillars of sustainability (economic, environmental, and social) and is the roadmap for both the community and the municipal government to achieve the overall vision of a sustainable San Antonio as an inclusive and fair community with a thriving economy and a healthy environment. The Sustainability Plan highlights seven focus areas and five cross-cutting themes. Each focus area has its own vision, outcomes, strategies and measures of success. The cross-cutting themes identify and highlight key priorities. Additionally, these crosscutting themes were considered and integrated into each of the major components and elements of the SA Tomorrow Comprehensive Plan and the Multimodal Transportation Plan.



SA Tomorrow Multi-Modal Transportation Plan

The Multimodal Transportation plan is a dynamic, balanced, and forward-thinking plan for all modes of transportation, including cars, transit, bicycles, and pedestrians. It communicates the City's transportation strategy and and serves as a tool to analyze transportation priorities to best meet community goals. The City worked with stakeholders, partner agencies and the larger community to develop a plan that builds upon and operationalizes SA Tomorrow Comprehensive Plan goals and policies, incorporates all modes of transportation and recommends a sustainable, safe and efficient transportation system that can support the new residents, housing and jobs anticipated for our community over the coming decades.

SA Tomorrow Sub-Area Planning

Comprehensive Planning Program

The Comprehensive Planning Program (CPP) is the city's coordinated approach and process for city planning. It provides the rationale and goals for the city's long-range development efforts and contains three main service components: Building Capacity, Comprehensive Planning, and Implementation. The SA Tomorrow process identified several changes to be incorporated in the CPP, including new planning approaches and geographies. The intent of the revised hierarchy is to ensure that planning at all levels in San Antonio is completed in an efficient and effective manner with meaningful participation and buy-in from neighborhoods, property owners, business owners, partner agencies, major institutions and other key stakeholders.

While the Comprehensive Plan is the overarching planning and policy document for the City, there are four other planning levels including: Regional Plans (developed in collaboration with partner agencies to guide regional and multi-jurisdictional services and/or infrastructure investments); Citywide Functional Plans (directing specialized components of city planning such as transportation, economic development, housing, natural resources and sustainability); Sub-Area Plans (providing detailed strategies for specific geographies, such as regional centers, corridors, and neighborhood groupings, aligning them with higher level plan); and Specific Plans (addressing smaller scale geographies and focused on implementation).

The Midtown Regional Center Plan that this Atlas addresses is part of the Sub-Area planning program described in more detail below.

San Antonio Sub-Area Planning

Following adoption of the Comprehensive Plan in August 2016, the Planning Department is working with communities to create Sub-Area plans for the 13 Regional Centers and 17 Community Areas that collectively cover the entire City of San Antonio.

Regional Centers are one of the major building blocks of San Antonio's city form and a focus of the overall SA Tomorrow effort. While most cities have one or two larger employment centers, we have 13. This provides challenges and opportunities. A major organizing principle of the City's Comprehensive Plan is to focus growth in these Regional Centers, building on the existing pattern of development. They are envisioned as new "places" where we live, work, and play. Each center is different and its development will be influenced by its existing uses. However, many of the centers are also well-positioned to develop as vibrant mixed-use places. They offer a variety of housing options and price ranges, allow higherdensity and incorporate carefully designed and located amenities that will benefit both residents and employees of the center. San Antonio must focus its investment and infrastructure strategies on supporting and leveraging the unique identity and assets of each center.

Community Areas form the rest of San Antonio outside of the Regional Centers. These areas comprise many of our existing neighborhoods, grouped by geography and common history, challenges, and opportunities. By proactively directing a higher proportion of growth to our Regional Centers, we aim to limit the impacts of that growth on existing, stable neighborhoods. However, cities and neighborhoods are always evolving. We must plan to adapt to and leverage change for all our existing and future residents by creating complete neighborhoods and communities that provide a full range of amenities and services, a variety of housing and transportation choices, and opportunities for employment, shopping, education, and recreation.

The Regional Center and Community Area Plans will address the following topics based, in part, on the existing conditions identified in this Atlas: Land Use; Parks and Open Space; Economic Development; Housing; Mobility and Infrastructure; Placemaking and Urban Design; and Policy and Investment Priorities.

SA Tomorrow SA Corridors

SA Corridors is a collaborative effort to help lay out the future of our city in the most equitable, sustainable, and efficient way possible. It is one of the first steps in implementing SA Tomorrow as well as VIA's Vision 2040 plan, which both identified corridors as areas where future growth should be concentrated where appropriate. SA Corridors objectives overlap with and support the ongoing Sub-Area planning efforts. The plan develops a recommended future land use map and plan for 12 corridor areas, respecting existing small area and neighborhood plans while helping to implement SA Tomorrow. In addition, SA Corridors recommends proper regulations and incentives are in place to realize SA Tomorrow's vision for growth and economic development around VIA's transit investments, and to help bring about new and more transit-supportive types of development that meet a range of desires and incomes.

Three Types of Regional Centers

The 13 regional centers are grouped in three categories based on analysis of their existing conditions, unique traits and potential growth capabilities. It is important to note that they are not homogenous places. Although they cover large areas, each one includes multiple place types, urban forms and land uses.



Activity Centers

These areas have high concentrations of people and jobs in a mixed-use environment. They should be highly walkable and well connected by multiple types of transportation and transit. They should have an even mixture of jobs and housing and contain amenities that support residents, workers and employers within the centers and also throughout the city. Many are home to our educational, entertainment and cultural institutions.



Logistics/Services Centers

These areas have superior connectivity for the movement of goods and people including air, freight/rail and roadway transportation. This positions them as launching points for the city's exports and imports. These centers have large, coordinated areas of single uses, and concentrated nodes of mixed-use, with more jobs than residents. They provide goods and service to support businesses and residents adjacent to the center.



Special Purpose Centers

These areas have large employers, institutions and/ or concentrations of similar types of employment. These centers typically require or a barrier or buffer to separate their specialized activities from surrounding areas. They mostly contain primary employers and supportive services and amenities.

Regional Centers are one of the key building blocks of our city's future. In order to leverage their potential to help absorb San Antonio's projected growth we need a clear vision and strategic plan for each. These regional center plans need to refine each center's boundaries, identify areas of change and stability, and develop a detailed land use plan that prioritizes infrastructure, policy and program improvements. While these centers should promote higher-density, mixed-use development, not all areas within a regional center are recommended for this type of growth. For example, existing historic districts and neighborhood conservation districts are not recommended for higher-density development and should receive enhanced protection to prevent this. Our historic and conservation districts are some of our city's greatest assets and our development policies should protect them. Regional center plans must be respectful of these special areas when defining development opportunities.

Regional Center Area Profile

MEDICAL CENTER REGIONAL CENTER PROFILE

Existing & Aspirational Scores 65% 100% Transit Utilization 60% 90% Walkability 65% 80% Median Commute Distance 100% Employment Density of **Developed Land** 100% Residential Density of Developed Land 50% 62% Ratio of Employees to Residents 40% 60% Per Capita Income 60% 65% Housing + Transportation Index 82% 90% Job Diversity Index

Strengths: The Medical Center has great job diversity and a large concentration of housing.

Population (2015 estimate): 39,117 Households (2015 estimate): 19,318 Single-family to Multifamily Housing Units Ratio: 0.08 Employment (2013 estimate): 64,000 Largest Industries (by employment): Healthcare, Finance and Insurance, Education Acres: 3,670 Developed Acres: 3,330 The South Texas Medical Center is a major cluster of 45 healthcare and medical-related facilities, including 12 hospitals and five specialty institutions. Healthcare employment reached 27,500 jobs in 2011 and accounts for nearly 30% of all healthcare employment in the city. The Medical Center is also home to USAA, one of the city's largest employers. This area will continue to be the primary hub of medical-related activities in San Antonio with potential to evolve into a vibrant mixed-use center.

Tasks Ahead: Transit use to and within the medical center can be increased and the pedestrian environment can be improved to make it more walkable.





Chestnut Hill Square in Boston is a lifestyle and retail destination with a mix of shops and restaurants anchored by medical office and clinical spaces.





Water Body



History of the Medical Center Regional Center Area

The Medical Center Area originated from a dairy farm more than a half century ago. The area was annexed into the city in phases from 1952 to 1972, generally beginning in the southern portion of the plan area and extending north. The area known as the South Texas Medical Center was annexed into the city in 1963.

After World War II, San Antonio was the largest city in the country without a medical school. The San Antonio Medical Foundation was formed in 1947, as a non-profit corporation, the vision was to become a major healthcare center for the South Texas Region. In the 1950s, group of land owners from the Oak Hills area donated 171 acres of former dairy farmland to the San Antonio Medical Foundation. Months later, the medical foundation deeded 100 acres to the University of Texas for a future medical school. In 1961, the citizens of Bexar County voted to approve a bond issue that included \$5 million to construct a new 300-bed hospital that could double as a teaching facility. The University of Texas, Board of Regents agreed that medical schools thrive in medical centers, and were aware that a long term development would require more land. When the board advised that a school be associated with the teaching hospital, the foundation responded by acquiring over 700 acres to support the school and enable future expansion. By September 1963, The Southwest Texas Methodist Hospital, which was later renamed as Methodist Hospital, became the first hospital to open in the area followed by the construction of the Bexar County Teaching Hospital and the San Antonio medical school, and eventually the UT School of Nursing and UT School of Dentistry. Today, the campus is known as "The University of Texas Health Science Center at San Antonio." The success of the medical campuses facilitated the addition of several new hospitals and other medical services buildings, as well as, growth of commercial plazas and residential developments in the immediate area to serve the students and faculty. Today, most of the original land has been granted or leased entirely for medical and health service uses.

United Services Automobile Association and its affiliates, (USAA) was founded in San Antonio in 1922, with the intent to insure automobiles. Since then, USAA has been able to grow exponentially in terms of members and services. In 1976, USAA opened its new headquarters and constructed The McDermott Building on a 282 acre campus located at the 9800 Fredericksburg Road. As the organization continued to succeed, the building was expanded in five phases between the 1970s and 2001. The campus includes: The McDermott Building, USAA Federal Savings Bank and USAA Bank Services Building. USAA's headquarters is the largest private employer in the City of San Antonio.

The Medical Center area is also home to a number of residential subdivisions. Single- family residential developments include large-lot estates, typical 6,000-8,000 square foot lots, and small-lot or townhome construction. The larger lot developments were, generally, constructed beginning in the late 1940s through the late 1960s. Smaller single-family lots became the norm in the 1970s and 1980s. Some townhome development began as early as the mid 1970; however, the early 1990s saw a significant rise in the development of very small-lot single-family homes, both attached and detached.

The 1970s and 1980s also saw an increase in the number of apartment complexes being constructed in the Medical Center Area. Most multifamily developments are constructed at 33 units per acre, or less; and at a height or 3 stories or less. Much of the multifamily housing stock in the Medical Center Area is aging past its original intent.







The Medical Center Area is an example of solid, cohesive efforts to provide exceptional medical care and education to the State of Texas, of the strength to evolve with growing needs of the city, and the resilience to maintain the unique character of the area for years to come.

Medical Center Infrastructure and Institutions

Major Landmarks and Infrastructure

The Medical Center area is most recognizable by the medical institutions and hospitals and facilities that are densely located in the center of the plan area. Major landmarks include:

- South Texas Medical Center
- Methodist Healthcare Systems
- University Health Systems
- CHRISTUS Santa Rosa Hospital
- The University of Texas Health Science Center at San Antonio (UTHSCSA) campus
- Double Helix Sculpture at the entrance to UTHSCSA
- San Antonio Medical Foundation (SAMF)
 Walking & Jogging trail
- USAA Headquarters and Federal Savings
 Bank
- The Oak Hills Country Club
- Denman Estate Park and the Pavillion of Gwang Ju

The US Interstate 10 West and Loop 410 Intersection is, perhaps, the most recognizable roadway that borders the Medical Center area boundaries. Huebner Road serves as a major arterial that borders the North of the plan and beyond the Medical Center area. Wurzbach Road is also a major arterial that extends North West until Wurzbach Parkway; as well as Fredericksburg Road which begins close to the North boundary and crosses through the plan area, South, to downtown San Antonio. The VIA South Texas Medical Center Transit Center is the only bus transit center in the area. It runs throughout the medical center and beyond through routes: 520, 522, 534, 602, 603, 604, 606, 607. Primo service to downtown is also available through routes: 100 and 101.

The Floyd Curl Greenstreet Project will encompass the west side of Floyd Curl Drive from Louis Pasteur to Hamilton Wolfe Road, and along the east side of Floyd Curl Drive from Hamilton Wolfe to Fawn Meadow. The project is expected to be completed in late 2018.

Neighborhoods and Institutions

The Medical Center area is predominately Multi Family, however unique single family neighborhoods exist within the plan boundaries, registered neighborhood associations include: Laurel Hills, Apple Creek Property Owners Association, Dreamhill Estates, Mockingbird Hill Neighborhood Association, The Village at Rustic Oaks, and Rockwell Village Homeowners Association. The largest community organization located within the plan boundary is the Northside Neighborhoods for Organized Development (NNOD). The organization represents neighborhoods in the highest areas for residential and commercial growth.



Methodist Children's Hospital

The major institutions within the plan boundaries include:

- 45 Healthcare and Medical-Related facilities
- 12 hospitals
- 5 specialty institutions.
- USAA Headquarters; an 82 acre campus and also the largest private employer in the city.
- UT-Health Science Center campus
- Methodist Healthcare System
- University Health System
- CHRISTUS Santa Rosa Healthcare

With an abundance of medical facilities and hospitals, the area also has organizations to collaborate with each other to address continued growth. These organizations include:

The Medical Center Alliance (MCA)

The Medical Center Alliance (MCA) was founded in 1998 with a goal to address traffic congestion through street improvements and enhanced signage. As the area thrived, the goal of the MCA expanded to continue economic growth and promote community engagement.

San Antonio Medical Foundation

The San Antonio Medical Foundation was formed in 1947 as a Public Charity. The foundations initial goal was to facilitate a medical school and hospitals to San Antonio. At the time, San Antonio was the largest US city without a medical school. Since it's beginning, the SAMF has acquired over 600 acres of property, and holds an additional 220 acres for future medical or teaching facilities.



Demographics and Economic Profile

The Medical Center Regional Plan area is located north and west of the intersection of I-10 and Loop 410 in northwestern San Antonio. The area is centered around the South Texas Medical Center, a major cluster of health care activities with 45 medical related institutions, including 12 hospitals and 5 specialty institutions. Healthcare employment accounts for nearly 15 percent of all employment in the County, and 21% of that employment is in the Medical Center Regional Plan area. The center is also home to USAA, one of the City's largest employers located on Fredericksburg Road. The center will continue to be the hub of medical related activities in the City, and has the potential to evolve into a vibrant mixed use center.

Overall, the Medical Center Regional Center:

- Has a population that is much younger than the region overall, including a higher proportion of "Millennials".
- Has a housing stock that is significantly different from the rest of the city, with far fewer single family detached homes, and much more rental housing.
- Is home to 21% of the County's healthcare jobs, and has a higher concentration of high-wage jobs than the regional average.

Population

The Medical Center area has a population of nearly 60,000. The area grew at a rate of 0.8% per year from 2000 to 2010, and since 2010 has been growing at 1.3% annually, adding close to 4,400 people in that time. Household growth has occurred at almost the same rate, with the area growing at 0.8% per year from 2000 to 2010, and 1.2% from 2010 to 2016, adding 1,900 households since 2010.

Characteristics of households in the Medical Center area vary considerably from the City overall. Medical Center households are much smaller on average, with an average household size of 2.05 compared to the City average of 2.73. 57% of households in the area are non-family households, compared to only 35% in the City and 31% in the MSA, and 46% of households have only 1 person, compared to 28% in the City and 25% in the MSA.

Age

The population of the Medical Center is younger than the regional population overall; the median age in the area is 30.8 years, compared to 33.7 in the City and 35.0 in the MSA. The area has a smaller population under the age of 20 than the region overall, with only 23% of residents under age 20, compared to 28% in both the City and the MSA. The major population difference is in the "Millennial" cohort – those born between about 1980 and 1995. 37% of the Medical Center population falls into this age group, compared to 24% in the City and 22% in the MSA. Medical Center also has fewer seniors than the region overall, with 10% of the population age 65 or older, compared to 12% in the City and 13% in the MSA..

Race and Ethnicity

The Medical Center area has a diverse population. The population in Medical Center is only 53% Hispanic, lower than the 65% in the City, and similar to the 55% in the MSA. The population is 64% White, lower than both the City (71%) and the MSA (74%), and 10% Asian – much higher than both the City (3%) and the MSA (2%). The area has a Diversity Index score of 79, higher that both the City and the MSA which have a score of 72. Measured from 0 to 100, this number represents the likelihood that two random persons in the same area belong to different race or ethnic groups.

Income

Per Capita income in Medical Center is similar to the region overall, however median and average household income are both lower than the City and the MSA (Table 1). The area has a greater concentration of low income households than the region, with 21% of households earning less than \$15,000 per year (compared to 16% in the City and 13% in the MSA), and 27% of households earning between \$15,000 and \$35,000 per year (compared to 23% in the City and 20% in the MSA). This may be partly due to the presence of students of both UT Health and UTSA living in the area as the Medical Center has large concentration of rental housing.

Education

The population in the Medical Center has a higher educational achievement than the overall region, with only 8% of residents having less than a high school diploma (compared to 18% in the City, 15% in the MSA), 24% of residents having a bachelor's degree (16% in the City, 18% in the MSA), and 14% of residents with a graduate or professional degree (10% in both the City and the MSA). The workforce in the area also has higher educational attainment than the overall region, particularly those with bachelor's or advanced degrees.

Special Populations

In addition to residents and workers, the Medical Center area draws students and visitors to hospitals and other area institutions. The University of Texas Health Science Center has an enrollment of over 3,000 students, and University Hospital draws visitors from a broad geographical area, particularly as the main trauma center for a 22-county region of South Texas. In 2015 the Hospital had over 26,000 inpatient discharges and nearly 100,000 outpatient

visits.

Annual Household Growth | 2010-2016 Medical Center 1.2% City of San Antonio 1.0% San Antonio MSA 1.7%

Age of Householder



Housing

Average home values in the Medical Center area are similar to the County overall. The average single family home value is \$164,500, only slightly higher than the County average of \$163,000. While there has not been much new single family construction in the area, some recently built homes west of Babcock Road have listed and sold for closer to \$200,000.

Similar value trends appear in rental housing in the area. Average rent in the Medical Center area is \$883 per month (\$1.07 per square foot), lower than the County average of \$921 per month (\$1.11 per square foot). For new construction (developments built in 2010 or later) in the area, however, rents average \$1,225 per month (\$1.36 per square foot), on par with the County average for new construction.

The composition of housing stock in Medical Center is significantly different from the region overall. Only 13% of housing units are single family detached homes, compared to 64% in both the City and the MSA. There is much more multifamily housing in the area, with 30% of housing units in structures with between 3 and 9 units (compared to 11% in the City and 9% in the MSA), and 51% of units in structures with 10 or more units (18% in the City, 13% in the MSA).

There are also large differences in housing tenure and the characteristics of households between Medical Center and the region. 84% of housing units in Medical Center are renter-occupied, much higher than the 47% in the City and 38% in the MSA. The vacancy rate in the Medical Center is 10%, higher than the 8% vacancy in both the City and the MSA. The age of householders is another significant difference between this Regional Center and the region overall; 13% of households are headed by someone aged 15-24, compared to only 6% in the City and 5% in the MSA, and 32% are headed by someone aged 25-34, compared to only 19% in the City and 17% in the MSA (Figure 2).

There have been 5 new apartment developments completed in the Medical Center area since 2010, totaling 1,504 new units. An additional 4 projects are under construction, and will add 567 more units to the area.

The Medical Center Regional Center is forecast to grow by 7,200 households between 2010 and 2040, which equates to 240 households annually, or 1% of County growth.

Employment

The Medical Center Regional Center had 58,500 jobs in 2016. As would be expected, nearly half of area employment is in medical fields, with 47.6% of jobs in the Healthcare and Social Assistance sector. This is a much higher share than this sector has in the County, comprising 14.7% of employment County-wide. Another 15.3% of jobs in Medical Center are in Educational Services (this sector comprises 9.2% of County employment), and 6.5% of area employment is in Accommodation and Food Services. Major employers in the area include: USAA, UT Health, CHRISTUS Santa Rosa Hospital, Methodist Hospitals/Ministries, St. Luke's Baptist Hospital, and University Health.

The wages of jobs in Medical Center are higher than the County overall. Only 17% of area jobs have annual earnings of \$15,000 or less (26% in the County), 33% of jobs have earnings between \$15,000 and \$40,000 (compared to 37% in the County), and 50% of jobs have earnings of over \$40,000 annually (much higher than 37% in the County).

Very few employees in the Medical Center area also live in the area -94% of workers commute in from other places. Most of those employees have relatively short commutes, with 55% commuting less than 10 miles, and another 28% traveling between 10 and 24 miles to work.

Commercial and Industrial Development

Office

The Medical Center area has 12.98 million square feet of office space; this inventory has increased by 733,000 square feet since 2005. Office vacancy rates are 9.08%, similar to the County average of 9.98%. Rents for office space in the area are \$19.55 per square foot, also similar to the County average of \$19.30, and have increased at an average rate of 1.8% per year since 2005. There have been 13 new office developments completed in the Medical Center area since 2010, totaling 185,000 square feet of new space. There is one additional project currently proposed for the area that would add an additional 25,000 square feet of office space.

Retail

Medical Center currently has 3.37 million square feet of retail space; this inventory has increased by 107,000 square feet since 2005. Vacancy rates for retail in the area are 4.05%, similar to the County average of 4.18%. Retail rents are lower than the region, at \$11.57 per square foot, compared to the County average of \$14.88. Rents for retail space are similar to 2005 levels. There have been 8 new retail developments completed in the area since 2010, totaling 47,650 square feet of new space. There is one project under construction that will add another 2,000 square feet of retail space, as well as 3 proposed projects that would increase the inventory by an additional 29,600 square feet.

Industrial

The Medical Center area currently has 146,000 square feet of industrial space; this inventory has increased by 11,500 square feet since 2005. Vacancy rates for industrial space in the area are 12.38%, much higher than the County average of 5.6%, however industrial rents are higher than the County average, at \$6.98 per square foot (compared to \$5.25 in the County). There has been no new industrial development in the area since 2010, and there is currently no new development planned.

Hotel

There are 13 hotel properties in the Medical Center plan area, totaling over 550 rooms. There has been no recent hotel development, with the most recent project completed in 2006.







Previously Adopted Plans

The North Sector Plan was adopted in 2010. The plan area covers close to 400 square miles. The plan boundaries extend from North Loop 410 in the south to the City's ETJ in the north, and from Bandera Road/State Highway 16 in the west to I-35 and Toepperwein Road in the east. Due to its size, the plan area is divided into quadrants. The Medical Center area Regional Center is located in the southwest quadrant. The North Sector plan is the only City-adopted future land use plan that overlaps with the Medical Center area Regional Center Plan. This regional center is located entirely within the boundaries of the North Sector Plan; and does not include any neighborhood, community, or perimeter plans.

The City's Sector Plans were intended to implement land use planning for all areas of the City, especially those areas not included in an existing neighborhood, community, or perimeter plan. However, the Sector Plan program was put on-hold when the City decided to develop a new Comprehensive Plan. Three of five sector plans were developed and adopted by City Council. Each covers an immense area and none provide neighborhood-level detail or analysis beyond brief mentions of previously adopted neighborhood, community, and perimeter plans.

North Sector Vision Statement:

The North Sector is a community, rich with natural panoramic views and abundant natural resources, nestled in the Texas Hill Country. As the North Sector Community continues to grow, compatible live, work, and play opportunities will foster a high quality of life by:



- Preserving priceless natural resources, including the irreplaceable Edwards Aquifer, which provide a unique and valuable asset to the region today and in the future;
- Enhancing the integration of scenic and recreational resources, outstanding educational opportunities, and diverse quality housing; while
- Developing a compatible land use fabric that preserves military readiness, contributes high quality jobs to the regional economy, recognizes and respects private property rights and integrates sustainable development patterns.

The North Sector plan is divided into seven Sector Plan Elements:

- Transportation, Infrastructure, and Utilities
- Housing
- Economic Development
- Parks, Natural Environment, and Historic Resources
- Community Facilities and Education
- Land Use and Urban Design
- Military Compatibility

Transportation, Infrastructure, and Utilities highlights

- Connect Roadways and Non-Vehicular Networks for East-West Mobility
- New Ways to Move People and Goods & Changing the Behavior of the Commuter
- Connecting Bicycle and Pedestrian Paths for a Healthier Community
- Creating a Future Land Use Pattern That Fosters Integrated Utility Planning
- Protecting Existing and Future Residents from the Threat of Flooding



Housing highlights

- A Range of Housing Types Creates Choices
- The Natural Environment is Conducive to Low Impact Development
- High Density Housing is an Important Land Use
- Neighborhoods Are Well Organized

Economic Development highlights

• Focus on Retention and Expansion of Existing Major Employers • The Military is a Significant Contributor to the Sector and Regional Economy

Parks, Natural Environment, and Historic Resources highlights

- Recharge and Contributing Zones Are Important To the Health and Sustainability of the Natural Aquifer
- The Hill Country Contains Sensitive Landform, Vegetation and Wildlife Characteristics
- Historic Resources Provide an Important Physical Connection to the Past

Community Facilities and Education highlights

- Community Facilities are Critical Components for a Strong Community
- Public Safety and Protection Are Important Characteristics within the North Sector
- Schools Are the Foundation for Future Employment Bases
- Opportunities for Post-Secondary Education Will Enhance Vitality

Land Use and Urban Design highlights

- Potential for Compatible Land Uses
- Farms and Ranches are an Important Hill Country Component
- Tiers and Centers are the Land Use Components of the North Sector Land Use Plan

Military Compatibility highlights

- Land Use Compatibility is Critical for Camp Bullis
- Communication among the Military, Counties, and Cities is Important to Understand Each Entity's Issues and Objectives
- Encroachment Must Be Mitigated to Retain and Expand the Military's Presence in the North Sector and the Region







Natural Systems

The Medical Center area has several creekways throughout the area that provide a drainage way and ensure storm water runoff does not flood the area. Zarzamora Creek begins in the south portion of the plan boundary and continues for 8 miles South East. The creek travels through rolling terrain and eventually feeds into San Pedro Springs. A portion of the area on the Northwest border (Huebner Road) of the plan area is within the FEMA 100 year flood plain and the Leon Creek Watershed's southern border exists in the middle of the plan area. As Northwest San Antonio and unincorporated Bexar County have experienced increased development, measures have been taken to reduce the risk of future flood realated issues:

The San Antonio River Authority (SARA) facilited the development of the Leon Creek Watershed Master Plan in 2011. The purpose of the plan is to provide a long-term planning approach to address the potential impacts of projects in the area, address water quality concerns and proactively plan for future land use trends. The majority of the plan area is also within the Upper San Antonio River Watershed. The water shed begins at the boundary of the Leon Creek Watershed and extends South East through the remaining portion of the plan area. The "Upper San Antonio River Watershed Protection Plan" was developed in 2006 to study the sources of pollutants and create a plan of action to address control measures to control water pollution.









Existing Districts

The Existing Districts map shows the boundaries of the neighborhood associations and the South Texas Medical Center.

Most of the neighborhoods within the plan boundary have active home owner's associations that represent their neighborhoods. Typically the associations meet montly to discuss issues or events affecting their neighborhood. Some neighborhood associations actively promote 311, a service that makes it convenient for resdients to report city service issues that affect their neighborhood by dialing '311'. There are 6 registered neighborhood associations completely within the plan boundary: Laurel Hills, Apple Creek Property Owners Association, Dreamhill Estates, Mockingbird Hill Neighborhood Association, The Village at Rustic Oaks, and Rockwell Village Homeowners Association.

The most prominent area within the plan boundary is the South Texas Medical Center. The South Texas Medical Center is made up of more than 75 medically related institutions, more than 45 clinics, including 12 hospitals and one university. The center is organized into three main areas: the north area, located north of Hamilton Wolfe Road includes residential properties, undeveloped land and extended living facilities; The new campus area, south of Hamilton Wolfe Road, contains most of the educational and research institutions and the majority of undeveloped acreage; and the central campus area contains the more dense and established buildings including commercial and medical support facilities. The South Texas Medical Center differs from the Medical Center Area Regional Center Plan in that the STMC focusses on a more condensed area, whereas the Medical Center Area Regional Plan boundaries includes the areas and residential neighborhoods outside the scope of the STMC.









Land Use

The Medical Center Area consists of a mixture of uses, and, although the function and form of this regional center is influenced strongly by the Medical Center itself, nearly half of the land in this area is used for residential purposes. This makes the Medical Center unique. It maintains residential levels comparable to a community area, but it is also a major employment center for the region, and has a nearly even split of single family and multifamily land usage.

Single Family Residential

One fourth of the land in the Medical Center Area consists of single family residential property. Much of the housing stock and neighborhoods are over 30 years old. Land designated for single family use includes duplexes and townhomes, as well as conventional detached houses.

Commercial

Properties designated for commercial use are generally where goods and services are purchased. Shopping centers, grocers, restaurants, office buildings and hotels are all examples of commercial uses. In this regional center, 23% of all land in this area is designated for commercial use.

Institutional

Institutional uses account for 14% of all land in this area. The institutions in this area, such as hospitals and educational facilities, directly influence growth and economic performance, particularly in terms of multifamily development and employment. Institutional uses include schools, universities, churches, social services, cultural institutions and government services, as well as healthcare services and hospitals. Although the institutions of this area are a major source of employment, they only make up about 1/7 of the total land area of the Medical Center Area.

Industrial

Industrial uses include manufacturing, natural resource extraction (mining and quarries), assembly, distribution and storage facilities. Only a small percentage of land in this regional center is used for industrial purposes. Because most of the vacant land is already owned by institutions, it is doubtful that this number will increase significantly in the future.

Vacant Land

Vacant land, for the purposes of this analysis, is land where there is no vertical improvement or assigned or exercised use. This does not necessarily mean that a property is developable in the future. Some of the land classified as vacant is not developable, including utility easements and land in the floodplain. Some of this land, however, is developable, and will be able to accommodate future growth in this regional center. Vacant land comprises 9% of the Medical Center Area.

Multi-family Residential

Multi-family residential properties are those residential properties that have multiple units that are either owned or rented by different households. Multi-family residential uses include apartments and condominiums. Compared to the other regional centers, the Medical Center Area maintains a high percentage of land used as multi-family residential. This is an indicator that residential densities are high in this area, as roughly the same amount of land is used for single family houses as is used for multiple family units. When considering the pattern of higher residential densities, the availability of vacant land, and the age of the multi-family housing stock, there appears to be an opportunity for absorbing future population growth in this area.



Open Spaces

Open Spaces are those public and private portions of the Medical Center Area that are designated for uses that are not dominated by buildings. They are typically parks, greenbelts, preserves or outdoor recreational areas. Open spaces include golf courses, and are therefore not necessarily natural habitat. Currently 4% of the Medical Center Area is open space, and much of this is comprised of the Oak Hills Country Club.

Below is a breakdown of the distribution of land uses in the Medical Center Regional Center:

Land Use	Percent of Area
Single Family Residential	25%
Commercial	23%
Institutional	14%
Industrial	2%
Vacant Land	9%
Multi-family Residential	23%
Open Space	4%





Multifamily developments are prevalent in this area.

Accommodating Future Growth

- Multi-family residential is the second most prevalent use in the Medical Center Area.
- Of all of the multifamily development in this area, about 78% of it is over 30 years old.
- In addition to new development, absorption of future population growth will depend upon improving the performance of existing multifamily properties to increase density (capacity).
- Much of the future development of this regional center will be accomplished by institutions that already own undeveloped tracts. Collaboration will be necessary to ensure that both landowner and public priorities and needs are met as these sites are developed.



Vacant land provides opportunities for infill development in this area.

Infill Development Opportunities

- There are a number of unbuilt properties distributed throughout the area that provide opportunities for infill development.
- Where possible, larger, available parcels should be positioned to absorb future growth or to meet other identified land use priorities for this regional center.



Neighborhoods benefit from access to recreational facilities and open space.

Land Use Transitions and Neighborhood Quality of Life

- Although industrial development is limited in this area, buffers, screening, lighting and other measures should be employed to minimize the conflict between industrial and residential uses where they may occur.
- Several of the neighborhoods in this planning area have become enclaves, as commercial and multifamily development have grown up all around them. In this commercially active area, it is important to ensure adequate access to neighborhood services.
- On-street parking standards, adequate street lighting and sidewalks, and access to public parks and recreational areas are also needed.
- Higher density residential areas need greater connectivity to the City's pedestrian network and park and recreational facilities. Ideally, where private open space (yard space) decreases, public open space should increase. Parks, greenbelts and trails are needed in proximity to multifamily residential properties in the Medical Center Area.







Transportation and Mobility

Transportation planning for the Medical Center Regional Center will need to take into consideration anticipated future development, including a significant increase in both the number of local jobs and residents. With more housing available, there is an opportunity for improving the area's balance of jobs and housing. This shift could would allow nearby residents to shorten their commutes, with walking and bicycling as viable transportation options for shorter trips. This study identifies how forthcoming development within the traditionally automobile-focused Medical Center can accommodate and encourage more multimodal options. Implementing these recommendations will require close consultation with key stakeholders, chiefly medical employers and housing developers that anticipate building within the study area.

Roadways

Currently, the study area's roadway network is largely shaped by institutional land use patterns. The major roadways that provide for northwestsoutheast travel are Babcock Road, Fredericksburg Road, and I-10. Wurzbach Road, Huebner Road, Medical Drive, and I-410 serve west and eastbound traffic. However, the number and scale of institutional and recreational land uses in the study area is a barrier to overall connectivity, and the directness of northsouth or east-west trips. In particular, the numerous facilities at Medical Center, Oak Hills Country Club, and commercial areas cause for a circuitous pattern for the road network, and limit accessibility and connectivity for transit, pedestrians and bicyclists.

Residential areas south of Babcock maintain access to Wurzbach Road and other minor neighborhood thoroughfares. Arranged in a gridded street network, these neighborhoods could readily connect to new development or transit service. Residents in housing northeast of Babcock, however, must circumnavigate the hospital or other commercial and institutional land uses. Some of these neighborhoods are gated, further limiting access and transportation connectivity. Secondary arterials in this portion of the study area (north of Babcock, south of Huebner and southwest of I-10) could be enhanced to improve access to planned transit corridors on Babcock or Fredericksburg through improved bike and pedestrian facilities that provide non-motorized transportation connectivity.



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MIG

The map to the right demonstrates trip flows or the total number of vehicles moving toward the Medical Center activity center from all other centers in the Greater San Antonio Region. Each flow line represents the approximate total flow from other activity centers and the approximate direction of flow; however, flow lines do not represent the exact route that traffic would take to reach the destination.

VIA Metropolitan Transit Vision 2040 Long Range Plan

VIA'S PRIMO Bus Rapid (BRT) service (Routes 100 and 101) runs north-south through the study area. Route 100 extends from Fredericksburg Road to Medical Drive, and terminates at South Texas Medical Center Transit Center (SMTMC). Route 101 crosses the Study Area on Huebner Road, also serves SMCTC via Medical Drive, continues north on Fredericksburg Road, and ultimately connects to I-10 and UTSA.

The Medical Center Regional Center is within the Northwest Corridor, a VIA Vision 2040 Long Range Plan (LRP) Rapid Transit Corridor, and is under evaluation as one of the first projects to implement the agency's Alternatives Analysis plan. The alternatives analysis considers data, feasibility, professional expertise, and public input to prioritize which rapid transit corridor should move toward project implementation, as well as route selection and mode choice (Light Rail or BRT). The LRP also identifies this corridor as a critical component of the Rapid Transit Network, a higher-speed, reliable network of BRT, Light Rail Transit (LRT), and Express Bus Service. This network would provide highly-reliable, direct connections between the University of Texas at San Antonio (UTSA) campus, the South Texas Medical Center, and Downtown San Antonio.



The Medical Center Regional Center study area is one of the region's largest population and employment centers, with job diversity spanning medical, educational, and commercial sectors. The area is currently home to 39,000 residents, and expects to gain 35,000 new residents and nearly 59,000 new employees by 2040. This influx creates the need for additional transportation solutions, including growing ridership and levels of service on existing transit routes, and creating additional connections to these routes.

Existing transit service, particularly Primo Route 100 and Frequent Route 520, boasts some of the highest-ridership routes in VIA's system. Still, ontime performance is a concern, at 78% and 76%, respectively for these two routes. High levels of congestion make travel times unreliable, especially due to heavy traffic within and around South Texas Medical Center, and on Fredericksburg Road and parallel roadways. Growth in this area will create additional congestion, making frequent, reliable service even more challenging to provide.

Analysis within the LRP shows that a transit trip between South Texas Medical Center and Centro Plaza on Primo Service Route 100 is comparable with car travel, illustrated in Figure 3. While VIA takes 31 minutes, car travel takes about 20 minutes over the same route, depending on travel conditions. Though this performance is competitive, dedicated lanes for transit vehicles would significantly improve the level and consistency or transit service in the study area.

Bicycle and Pedestrian Facilities

Sidewalks on major arterials, such as Babcock and Wurzbach Roads, are mostly contiguous, with some additional pedestrian infrastructure (e.g. a signalized crossing near the VA Center). Street design remains automobile-focused, and sidewalks are typically narrow, and/or directly broader traffic, with no buffer between pedestrians and vehicles. Wide, one-way roadways adjacent to interstates, commercial strip mall development, high rises, and the Medical District are challenges to connectivity and accessibility.

Improved bicycle and pedestrian infrastructure in the study area will support transit access, as well as overall walkability and health around the Medical Center. In both of the main corridors the San Antonio Tomorrow plan finds significant gaps in pedestrian and bicycle connectivity. At present, the study area has bike lanes on a few neighborhood streets. However, locating these investments where users feel safe biking and walking is also key. Corridor plans for Babcock and Fredericksburg Road support Babcock as a location for bike lane infrastructure, as higher traffic volumes on Fredericksburg would discourage all but the most experienced cyclists.

Inconsistent and narrow sidewalks demand attention to provide a comfortable pedestrian environment. SA Tomorrow's MMTP recommends pedestrian refuge islands every half mile on Babcock, and extending sidewalks north of Huebner. Within the Fredericksburg Road Corridor, the plan also recommends midblock pedestrian crossings with refuge islands, as well as RRFBs periodically throughout the corridor near VIA's highest ridership stops.



Travel times for transit services along the Northwest Corridor are currently the same for buses and cars.

Finally, the plan also recommends redevelopment of Medical Center facilities should incorporate more pedestrian-focused streetscape improvements to improve transit access.

There is little evidence of bicycle parking in the study area, there are six bike share stations in the study area, including those in Breckenridge Park.







Amenities and Access

Although the Medical Center area does not provide a variety of amenities, the few that do exist are widely used by residents, visitors, and employees. The Denman Estate Park is a small community park cherished by the surrounding neighborhoods. Purchased by the City of San Antonio in 2007, the former estate is also used as a retreat center by the University of Texas of Incarnate Word. The park includes a .5 mile walking trail, labyrinth, and picnic benches. The park also features a hand built monument crafted and donated by Gwangju, Korea, a sister city to San Antonio. The San Antoino Medical Foundation Walking and Jogging Trail is a 2.2 mile trail winds through the San Antonio Medical Foundation properties along Hamilton Wolfe and Floyd Curl Drive. The trail is open to the public during daylight hours and is

widely used by residents, vistors, and medical center employees. The trail has the potential to connect to existing, underutilized drainage easements and vacant properties to create informal recreational opportunities. The Bob Ross Senior Center, located on Babcock Road, contributes to the overall health and vibrancy of the senior community by providing case management, health and wellness, education, volunteer opportunities and social activities for resients 60 years of age and older. Services include: medical screening and assessments, arts & crafts, a computer lab, a pool, exercise classes and a comprehensive nutrition program. The success of the existing amenities demonstrates a desire from the community to provide additonal amenities and informal recreation opportunities to make the area more vibrant.









Public Investments

There are two areas within the plan boundary that are identified in the Inner City Reinvestment Infill Policy (ICRIP). The ICRIP is intended to coordinate public initiatives within targeted areas in order to stimulate private investment into walkable urban communities that are the building blocks of a sustainable region.

The Wurzbach Neighborhood Improvement Bond includes distressed strip retail as well as vacant property along Wurzbach. The former Turtle Creek event Center is also included; the building currently stands in a state of demolition. New development could potentially include large vacant parcels along Wurzbach for multifamily and or mixed uses. The Medical Center Area currently has two public investment projects. The Medical Center Phase 10 project, which is part of the 2017 Bond, will provide drainage improvements, new sidewalks and widen the intersection of Louis Pastuer and Ewing Halsell. The Floyd Curl Green Street Project is under construction and will provide a 10 foot wide two-lane cycle track as well as a brick buffer to protect cyclists from traffic. The Floyd Curl Green Street Project is funded by the Texas Department of Transportation and the Medical Center Alliance.









Preliminary Opportunities

The Medical Center Area is a place rich in diversity and opportunity. The area is conveniently located close to Interstate 10 and Loop 410 making it accessible from all parts of the city. Access to medical services, clinics, pharmacies, doctor's offices and emergency services make the area popular among residents in the area. The area also has diverse employment options. Although the healthcare sector dominates the employment pool, offices jobs, retail and service industry jobs provide support to the healthcare industry. The area is also ethnically diverse, which allows for a range of backgrounds and cultural identities to intersect in one geographic area. The area is bountiful in ethnic restaurant options which provide a unique asset to the area. Projected residential and employment growth to the area will require additional housing and employment options for future residents or employees.

As the area continues to attract diverse talent, providing common amenities, quality housing, and mobility options will be essential in continuing to promote the area's vitality. Overall, the Regional Center has a younger demographic than the region, and a higher rental housing stock than the rest of the city. Continuing to promote housing density will be essential to accommodate the high population of renters moving to the area. Current city bond projects and efforts by the Medical Center Alliance to enhance the area could set a high standard of quality for public spaces within the plan boundary.

Focus Areas

The following areas are preliminary opportunity sites in the Medical Center Area:

- The center of the Medical Center
- The Babcock, Heubner, Floyd Curl Area
- The Bob Ross Senior Center and Former City Fire Station
- The area by USAA Blvd and Hubner Road



