

A TECHNICAL ASSISTANCE PANEL REPORT

A Village Center for Exeter Is it Feasible?

Exeter, Rhode Island



December 16, 2010



**Urban Land
Institute**

Boston

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Executive Summary

Under the direction of the Urban Land Institute's Boston District Council, The Exeter Technical Assistance Panel (TAP) convened in Exeter, RI in October 2010, bringing together stakeholders, Town and community leaders, and a panel of land use and development professionals for a day-long session focused on the viability of the Town's proposed Village Center concept.

Focusing on a 375 to 500 acre parcel at the intersection of Route 2 and Exeter Road, directly across from Rhode Island's Veterans Cemetery, the team met with the Town's planning staff over the course of the day, and toured the preferred site as well as Oak Harbor Village, before interviewing nearly a dozen stakeholders and community leaders to understand the area and its dynamics. Data collected and prepared by the Town's planning and development staff prior to the TAP informed this discussion.

The panel then held a "closed door" charrette during which it identified regional opportunities and constraints that would affect the viability of the proposed Village Center concept consisting of a mixed-use, denser residential Village Center. The outcome of this collaborative effort was a presentation by the TAP panelists at a public meeting and this report.

The report that follows is separated into four chapters and provides background about the TAP program, an overview of the issues associated with the proposed Village Center concept in Exeter, the Panel's recommendations regarding the concept and the Town's next steps.

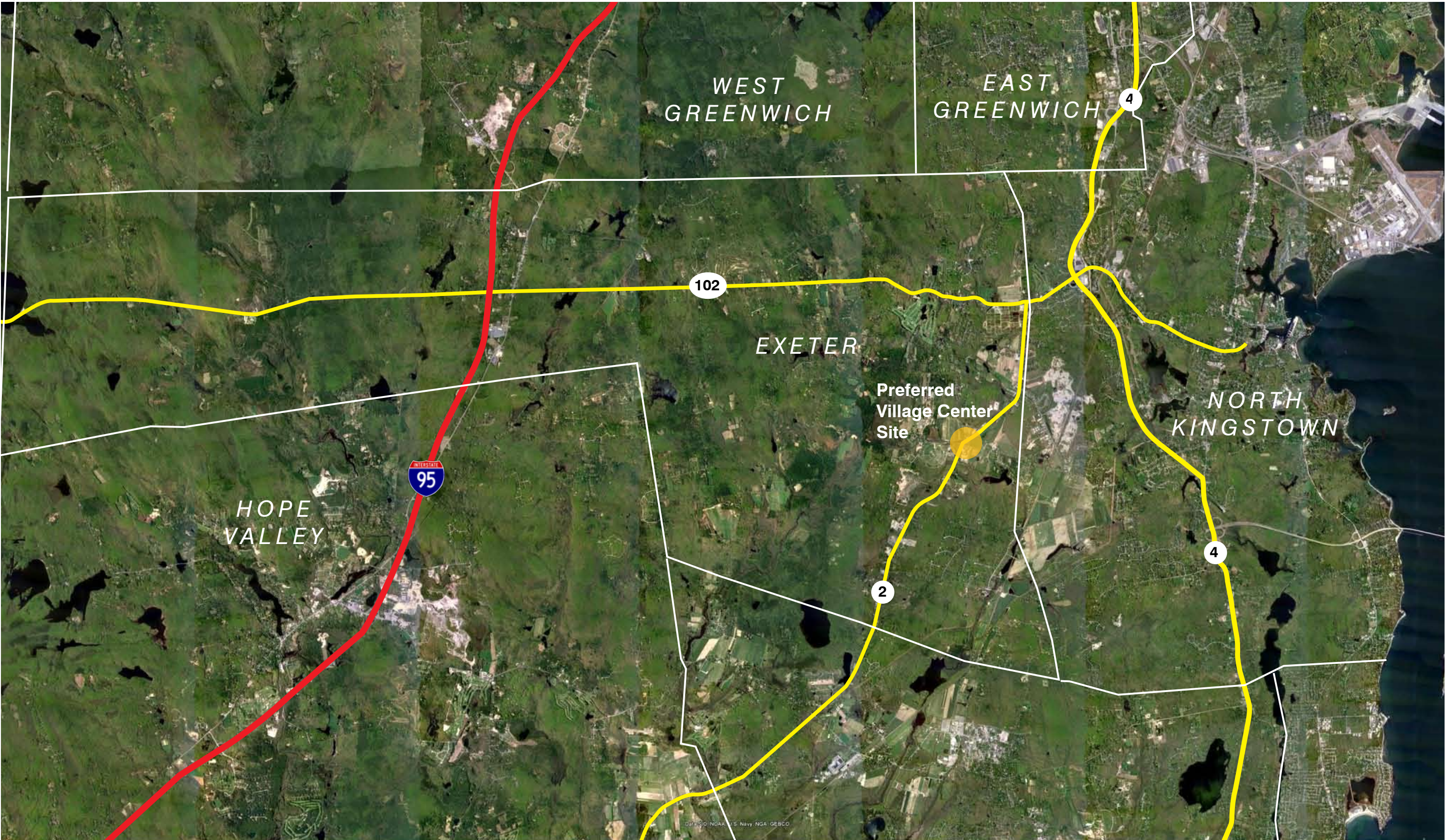
Chapter 1: ULI and the TAP Process gives an overview of the Urban Land Institute's Boston District Council and its Technical Assistance Panels (TAPs) and provides a detailed list of participants in the October 2010 Exeter TAP including town officials, stakeholders, and a panel of land use and development professionals.

Chapter 2: Background and Assignment provides a thorough recount of the lengthy public engagement process (begun in 2003) of which this TAP was a part. The panel reviews the Town of Exeter's Objectives for this Technical Assistance Panel and reviews the Preferred Village Center Site, including its boundary and key physical issues and constraints. In this chapter the panel defers response to the detailed objectives for the TAP as outlined in its application, arguing that the most value it can offer is through its "30,000 foot" perspective.

In *Chapter 3: Observations and Findings* the panel enumerates the relevant issues raised in the tour, assesses the long term Regional Context within which an Exeter Village Center would be operating, and determines a single Village Center as proposed may not present market conditions favorable enough to attract developers to such a project.

Finally, in *Chapter 4: Recommendations*, the panel provides its analysis on the feasibility of the proposed concept then recommends an alternative approach to future development, whereby the town supports "clustered villages" around existing commercial development nodes along Route 2 and suggests; aiding development by completing a full review and revision of the town's zoning code; tracking of other regional scale projects that may provide potential development opportunities for the Town; and investing in public infrastructure.

Figure 1: Regional Context



1 | Background

a. Urban Land Institute (ULI)

The Urban Land Institute is a 501(c)(3) nonprofit research and education organization supported by its members. Founded in 1936, the institute now has more than 30,000 members worldwide representing the entire spectrum of land use and real estate development disciplines, working in private enterprise and public service.

As the preeminent, multidisciplinary real estate forum, ULI facilitates the open exchange of ideas, information and experience among local, national and international industry leaders and policy makers dedicated to creating better places. The mission of the Urban Land Institute is to provide leadership in the responsible use of land and to help sustain and create thriving communities. ULI Boston serves the six New England states.

b. Technical Assistance Panels (TAPs)

The ULI Boston's Public Outreach Committee convenes Technical Assistance Panels at the request of public officials and local stakeholders of under-resourced communities and nonprofit organizations facing complex land use challenges who benefit from planning and development professionals providing pro bono recommendations. At the TAP a group of diverse professionals representing the full spectrum of land use and real estate disciplines typically spend one to two days visiting and analyzing existing built environments, identifying specific planning and development issues, and formulating realistic and actionable recommendations to move initiatives forward in a way consistent with the applicant's goals and objectives.

c. Panelists and TAP Process

Panel Members

ULI Boston convened a panel of volunteers whose members represent a range of disciplines associated with land use and development required to assess Exeter's concept for a Village Center at the Town-owned site. Disciplines represented included planning, architecture and landscape architecture, transportation planning, development and construction, and finance and marketing. Members were selected with the intent of convening a robust array of professional expertise relevant to the Town's objectives for this TAP. The following is the list of panelists:

- Aaron Ford, Structural Engineer, LA Fuess Partners (TAP Co-Chair)
- Richard Lampman, Architect and Builder, Tocci Building Corporation (TAP Co-Chair)
- Arthur Eddy, Landscape Architect and Planner, Gates, Leighton & Associates
- Jane Howard, Transportation Planner, Howard/Stein-Hudson Associates
- Victor Karen, Development Consultant
- William Lawrence, Financial and Economic Consultant, TR Advisors
- Christopher McMahan, Architect, Christopher McMahan Architect, Inc.

Caitlin Bowler of ICON architecture, inc. served as a consulting technical writer. Michelle Landers of ULI Boston provided organizational and technical support in preparation for and during the TAP event.

Officials from the Town of Exeter who served as primary contacts for ULI Boston included the following:

- Scott Millar, Chair, A Vision for Exeter
- David W. Schweid, Town Planner

Scott Millar and Mike Cerullo welcomed the TAP Panelists and kicked off the panel with an overview of the project's background, the issues and Town objectives.

Stakeholders

The success of this TAP would not have been possible without the cooperation of the diverse group of stakeholders who met with the panel and shared ideas, assessments and opinions on a range of issues. Stakeholder contributors to the Exeter TAP included:

- Dan Cotta, Developer, Liberty Hill Office Park
- Patty Dewardnes, Owner, Yawgoo Ski & Water Park
- Cal Ellis, Town Council, Town of Exeter
- Hugh Fischer, Developer, Deer Brook Estate
- Scott Kettele, Former Director of Public Safety and Fire Chief, Town of Exeter
- Rich Marcello, Developer, Oak Harbor Village
- Bob Marcello, Developer, Oak Harbor Village
- Dan Patterson, Owner, Farm stand and excavating business; Member, Exeter Planning Board
- John Ryner, Planner, Town of North Kingstown
- Chris Sheehan, Washington Trust Bank
- David Schweid, Planner, Town of Exeter

TAP Process

The Exeter TAP was held on October 21, 2010. In the morning, Scott Millar and Mike Cerullo, members of the Village Innovation Project Advisory Committee, welcomed the panelists at the Exeter Job Corps Center and gave an overview of the preferred Village Center site, the concept's background and genesis, relevant issues and dynamics within the Town, and the Town's aspirations for future development.

This introduction was followed by a short visit to the preferred site at Route 2 and Exeter Road/Main Street, followed by a visit to the Oak Harbor Village, a relatively recent commercial development.

After the tour the panel interviewed a diverse series of stakeholders that included a town council member, Public Safety officer, city staff, small business owners, and local developers. The panelists then engaged in an intensive "closed door" charrette to develop recommendations addressing some of the critical issues associated with a viable Village Center development, along with "next step" recommendations that were shared with the community at a public presentation that evening.

The panel delivered its presentation to an audience of approximately 40 people, consisting of local residents, business owners, city staff, and other interested individuals. The presentation is available electronically by request from the Town Planning Office and at the ULI Boston website <http://boston.uli.org>.

2 | Background & Assignment

a. Exeter's Recent Planning Efforts

Since 2003, the Town of Exeter has been engaged in a sustained effort to discuss dynamics of change that are effecting the town. The goal of this effort has been to get the Town to develop strategies that will guide and shape future change in ways beneficial to itself.

The Borderlands Project

In 2003 the Town of Exeter began participation in The Nature Conservancy's Borderlands Project. This effort brought together representatives from towns along the border of Rhode Island and Connecticut whose boundaries pass through the Pawcatuck Borderlands forest—the largest un-fragmented forest system between Boston and Washington, D.C.—to discuss planning action that could balance protection of this unique environmental landscape, including its water resources, while encouraging positive economic development to accommodate population pressures created by growth in the region's major centers—Providence, RI and Hartford, CT.

Village Innovation Project

Out of this initial effort, the Town of Exeter was chosen to be part of the Village Innovation Project, a structured process through which the Town has explored potential strategies for facilitating positive economic development, while protecting the farmland and open space that defines the rural character of this relatively under-developed region.

The Village Innovation Project has been led by a consulting team that includes Dodson Associates, ForeSee Consulting, and the Consensus Building Institute. A Local Pilot Team made up of town staff, residents and business owners appointed by the Exeter Town Council has overseen this process. Susan Westa of the Green Valley Institute, Kevin Essington of the Nature Conservancy and Ariana McBride of the Orton Family Foundation helped to coordinate and direct the

project. The Pilot also received advice from a bi-state advisory group made up of government agencies, non-profits and private sector parties.

During Phase I of this project, the Pilot Team and consultants interviewed members of the community and collected opinion in various forums, via the web and community workshop, to get residents' perspectives on issues critical to shaping Exeter's future. A second community workshop focused on the amount of growth allowed under existing regulations and explored a variety of ways to shift new homes and businesses to protect sensitive resources and create new village centers.

The Town is now engaged in Phase 2 of the Village Innovation Pilot, during which it is considering in more detail the various possibilities for channeling growth. This process has included “assessing the development potential of proposed village sites, measuring environmental benefits, and looking at the potential financial costs and benefits to the town of existing development patterns as well as village-style development” (Executive Summary, A Vision for Exeter, p. 2).

Village Center-style development would be characterized by a relatively dense and walkable mixed use center that would combine housing, retail, and possibly some office functions. The density and centrality of the development would give the Town an identifiable center that it has never had.

b. Town of Exeter's Objectives for the TAP

The TAP was a one day event during this otherwise lengthy and sustained townwide discussion. It was from within this process that Exeter applied to host a TAP, and consequently, had developed a very specific set of objectives for the TAP focused on the Village Center concept.

The Town's objective for the TAP were very specific:

- (1) Define an appropriate village development for the Town of Exeter;
 - (1.1) Illustrate what an actual mixed-use village can look like by preparing conceptual plans for one alternative;
 - (1.2) Suggest potential architectural styles for a mixed-use village;
- (2) Recommend a mix of uses the town should consider including in the Village Center

After reviewing the materials provided to panelists by the Town, and gaining an overview of the process to date and the land use, growth, and development issues that the proposed Village Center concept was intended to address, the panel collectively concluded that the most value it could offer the Town through the TAP was a "30,000 foot" perspective.

Over the course of the day, through stakeholder interviews and charrette discussions, the panel grappled with the larger regional context in which a Village Center in Exeter would function, and the effects of that context on its fundamental viability.

TAP panelists discuss regional dynamics at play during the afternoon charrette.



c. Village Center Site Alternatives

The Town of Exeter engaged in the Village Innovation Project believing that the mixed-use Village Center concept was a potential strategy for channelling future growth into denser, less land intensive development that would help the town preserve the open space and farmland that gives it its character, while adding commercial development and providing a Town Center—an element the Town of Exeter has never had.

In September, 2010, the Town held a public meeting attended by 70 community members as part of the Village Innovation Pilot to discuss possible sites for a mixed-use Village Center out of four that had been selected from a larger pool. During the meeting attendees were asked to place a dot on one of four possible sites, as a way for town leaders to gauge the community support each. The photograph below shows that map, where each blue dot represents the opinion of one individual. Dots outside the town's boundary express opposition to the Village Center concept in general. Descriptions of each of the four sites follow.

Location A

Intersection of Nooseneck Hill Road (Route 3) and 10 Rod Road (Route 102), with immediate access to Interstate 95. Seven miles from Exeter's primary intersection, at Route 102 and Route 2—Oatley Restaurant and The Corner Tavern.

Location B

The Town Library site. Route 102 adjacent to the new Library; 4 miles to the Interstate 95 access via Route 102, 3.5 miles to Exeter's primary intersection and 4.5 miles to Route 4 access.

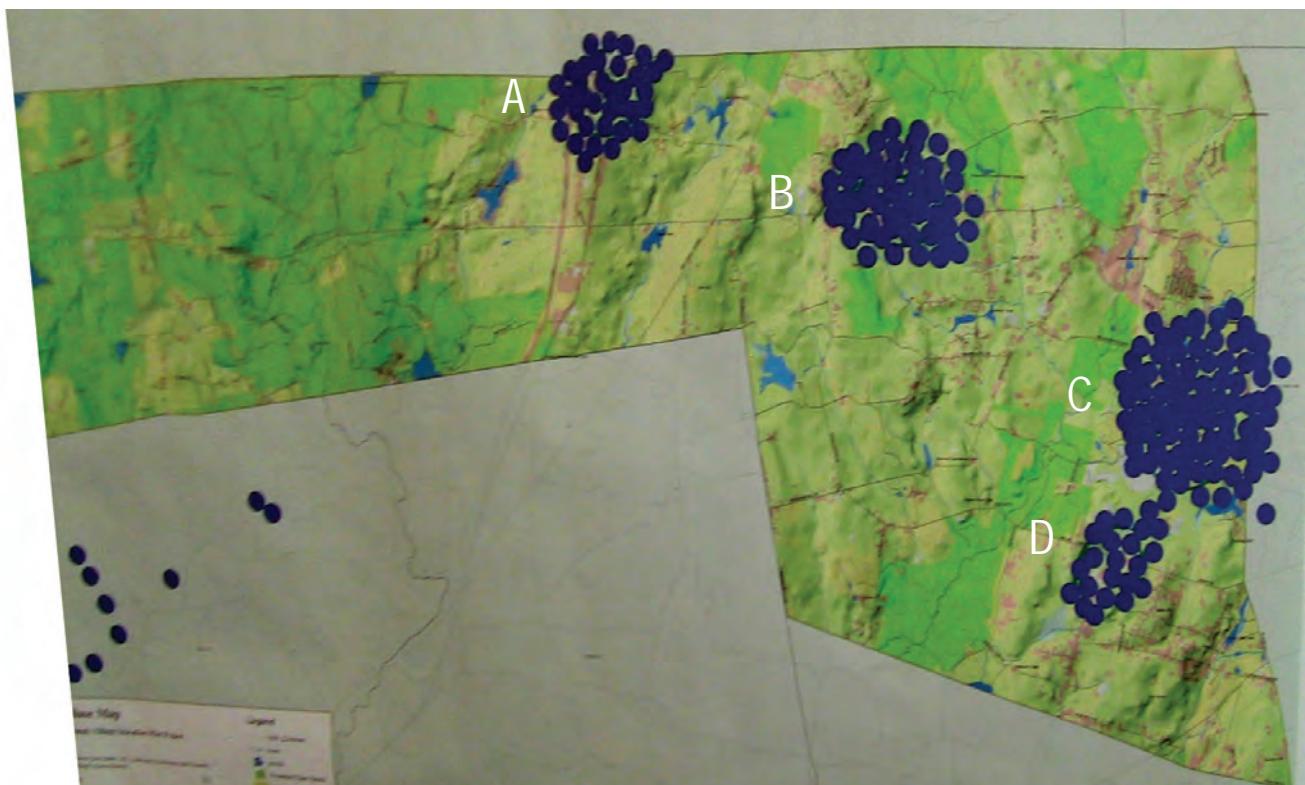
Location C

Intersection of Route 2 and Exeter Road/Main Street. Approximately 3.5 miles to Route 4 and regional shopping corridor. Between 375 - 500 acres, depending on boundary. Simple ownership profile.

Location D

Area surrounding Oak Harbor Village development and the Split Rock Trailer Park.

Figure 2: Photograph of Visual Preference Survey Map (September, 2010)



d. Preferred Village Center Site

The site chosen at the community workshop in September, 2010 is at the intersection of Route 2 and Exeter Road/Main Street (Identified as *Location C* in *Figure 1*).

The general boundary of this site, which comprises 375 to 500 acres depending on which parcels are included, is outlined in red in *Figure 3* on the following page.

Factors contributing to its selection by the community include:

- Its somewhat central location within “eastern” Exeter;
- Its location on Route 2, which is a well traveled commuter route with 14,000 Average Daily Trips;
- Simplest ownership profile of all the four alternative sites, which includes an 89 acre parcel north of Exeter Road (diagonally bisected by Route 2) owned by the Town;
- Existence of the Exeter Post Office on the site, as well as several local serving businesses;
- Proximity to existing aquifer due west, below the Exeter Job Corps complex, and the possible presence of an existing water line along Main Street, toward Route 2;
- Proximity to two relatively dense residential housing developments: Cedar Grove (450 units, 2 miles north) and Deer Brook Estates (130 units, 1 mile south).



Entrance to the existing commercial parcel at Route 2 and Exeter Road.

Figure 3: Location C / Preferred Site Development Constraints (Orthophoto, Summer, 2008)



3 | Observations & Findings

a. Issues raised in Tour & Discussions

After discussion on the tour with Scott Millar and lengthy interviews with stakeholders during morning sessions, the panel identified key issues with direct relevance to any recommendations it would make regarding the feasibility of a Village Center at the Town's preferred Exeter Road/Route 2 site or any alternatives it might offer instead.

Limited Commercial Revenue

Exeter's roots are agricultural, but it is now home to just over 6,000 residents (2000 Census) living almost exclusively in single family homes. Commercial and industrial uses do exist in the town, but they are very infrequent relative to residential uses.

Table 1: Percentage of Tangible Property, 2001, 2008

Use	2001	2008
Residential	77.39	86.10
Commercial	6.95	7.88
Industrial	1.30	0.88
Other	14.36	5.14

Source: Exeter Tax Assessor

For instance, Yawgoo Ski and Water Park is a seasonal business in operation no more than 6 months of the year, yet it is the 3rd or 4th highest tax contributor to the town. Not surprisingly, the town relies heavily on property taxes to generate revenue for town services.

Finding a way to expand the commercial tax base through positive, well planned development is a critical issue for Exeter.

Limited Services

Exeter has a fire service, but does not have a police force. The town is served by a chartered, privately owned Fire Department that operates two firehouses in town, both of which rely heavily on volunteer fireman and emergency responders. Because of Exeter's large geographic area, the fire service's reliance on so many volunteer staff can result in very long first response times, which has earned the department a very low rating from the Insurance Premium Service—9 out of 10. This rating negatively impacts insurance rates in Exeter and is a legitimate public service issue. The absence of a police department precludes a bank branch from locating within the town.

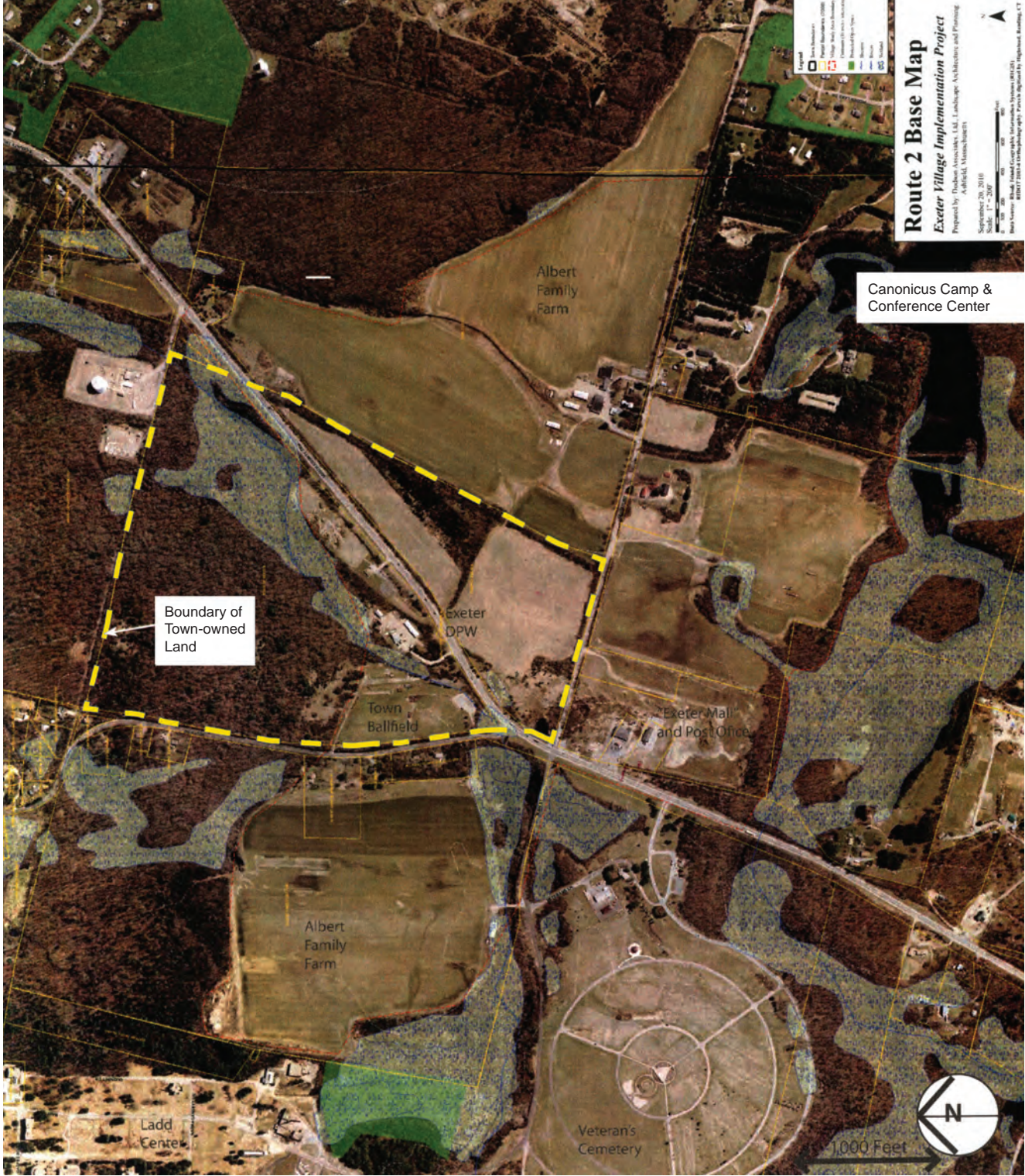
The status of Public Safety Services are, to a degree, representative of Exeter's larger dilemma: It is difficult to attract the kinds of commercial uses that would allow the town to offer better services (included public water or sewer) but providing such services and/or infrastructure upgrades is very expensive and would place even more of a tax burden on homeowners in the short to medium term.

Limited Public Infrastructure

Exeter does not have a public water supply, nor does it have a sewerage system in place. Historically, limits of septic system technology required diffusion of development throughout the town, codified in the large lot, 3 and 4 acre single family zoning that still exists across much of the areas zoned residential. Future improvements to this technology could make smaller lot zoning a reasonable alternative to 3 and 4 acre zoning, which is technically considered exclusionary by the State of Rhode Island.

The absence of both water and sewerage systems remain an additional barrier to attracting desired mixed-use development, because of the costs. All recent developments have built individual fire suppression systems, which include holding tanks and reservoirs and have been cited as a financing challenge.

Figure 4: Boundary of Town-owned Land within Preferred Site (Orthophoto, Spring, 2004)



Inadequate Zoning

Exeter was the last town in Rhode Island to adopt a zoning ordinance, and its current ordinance is inadequate to its stated goals/vision regarding future development patterns. It was also successfully challenged by a developer recently, which resulted in the successful permitting and construction of the Deer Brook Estates, clustering 130 units, .25 acres / unit (a mix of single family and townhouse condominium) onto 84 acres of a 164 acre parcel adjacent to Route 2.

Tough Demographics

Exeter's small population makes it unattractive to national franchise operators who are generally looking for denser populations and/or larger numbers of commuters passing by available parcels.

Existing Commercial Needs Support

The existing commercial clusters, such as that at Oak Harbor Village, are good first steps that could benefit from additional uses clustered in close proximity.

b. Long Term Regional Context

To assess the viability of the Village Center concept in Exeter, the panel looked critically at the larger regional context, addressing both existing regional attractions and assets as well as definite and potential future assets. Public transportation infrastructure investments coming online in the next year will connect Exeter more closely to the larger region, making it more desirable for new residents. However, the town will remain situated within a network of established and varied attractions that would provide stiff competition to the proposed Village Center that locates within the town. This regional context and the associated competition is problematic to the fundamental viability of a Village Center development in Exeter.

New Commuter Stop at Wickford Junction

The MBTA broke ground in August, 2010 on a new commuter rail station at Wickford Junction in North Kingstown, which is scheduled to open near the end of 2011. The 20 mile extension of the Boston-Providence line will first connect to a new intermodal transit station at T.F. Green airport in Warwick, before terminating at Wickford Junction. The MBTA plans to make three round trips daily between Boston and Warwick when that station first opens in 2011, and is scheduled to be making eight round trips daily by the time the Wickford Junction Station is online.

The extension of the commuter rail to North Kingstown, at a location just a mile from the Exeter line, will make Exeter a more attractive residential option for homebuyers who work and commute to downtown Providence. Demand for housing is expected to increase beyond additional planned developments in North Kingstown when this station is operational.

Access to Route 1

Completion of the four lane, divided highway Quonset Point connector from Route 4 to the Quonset Point Industrial area provides easy access for the first time to Route 1. Commercial development from Wickford north on Route 1 to Warwick is, for the most part, a remnant of 1950s strip development. Recognizing this the Town of North Kingstown has created a new zoning district of up to 30 dwelling units per acre that would encourage higher density residential development along with other retail and office uses or a mixed of uses. These factors put Exeter at a competitive disadvantage to North Kingstown in attracting development.

Wickford Village

Dating to the early 18th century, Wickford Village is an historic town center established in well-protected harbor on Narragansett Bay that features a large collection of historic homes and buildings, now filled with an array of unique shops, boutiques, and restaurants. It is on the National Register of Historic Places and is classified as a U.S. Historic District.

Its highly unique, historic, waterfront setting have positioned it as a regional attraction—it is the original “village center” in Rhode Island.

Existing Regional Center, Route 4/102

The closest regional shopping center is located just one mile east of the Exeter town line in North Kingstown at the Junction of Routes 102, 4, and 2; it extends one half mile along Route 102 past the south-bound access ramp to Route 4. The major big box stores located here include The Home Depot, Super Stop & Shop, Walmart, and Staples, while smaller outlets include Dunkin’ Donuts, Bank Rhode Island, Junction Pizzeria, and Roberts Health Center.

This shopping center is very close to the preferred site for the Village Center and would be a significant deterrent to a developer considering building mixed-use commercial space in Exeter, depending on the retail mix of the new center.

Warwick Mall / Route 2 Commercial

The Warwick Mall Shopping Center and the Rhode Island Mall Shopping Center are located at the junction of I-95 and I-295, due west of T.F. Green Airport and 20 minutes by car from Exeter. This regional shopping center provides different outlets than those at Route 4/102 and would be another competitive force on a new Village Center in Exeter.

URI - Narragansett Connections

The University of Rhode Island at Kingston serves 15,000 students on average each semester, many of whom commute to the school. This population would seem to be a promising potential market at which to target new rental apartments as part of a mixed-use village in Exeter. Current commuting patterns do present an issue: currently, many students who attend URI live (and work) in Narragansett, which is less than a 20 minute drive. However, more multi-family housing to the north might attract graduate students.

Additionally, several stakeholders suggested a market could exist in Exeter for graduates of URI who have completed their studies and are interested in living in town, but cannot find any rental housing. Such development could be encouraged as part of the a village center.

North Kingstown Viable Town Centers

There are two sites in North Kingstown that are legitimate locations for future village center development: Post Road Corridor site and Northeast Corner of Rts. 2 & 102, just east of the Exeter/North Kingstown town line.

POST ROAD CORRIDOR SITE

The Town itself has been working to make the Post Road Corridor (Route 1), an area of approximately 650 acres, attractive for development as a high density, mixed-use center. This effort has included the rezoning of 650 acres of land, necessary changes to the Subdivisions and Land Development Regulations in place, amendments to the Comprehensive Plan, a streamlined approval process, review to ensure adequate public water supply infrastructure, and the passage of a sewer bond. The sewers for the corridor

Figure 5: Regional Context



currently under design are expected to be in construction in 2011, eliminating a major up-front cost to potential developers. North Kingstown has also made progressive efforts to streamline and make transparent the entitlement process.

One aspect of the recent rezoning is the allowance for up to 30 units/acre plus commercial uses, with the stipulation that developers utilize the Town's new Transfer of Development Rights (TDR) program. Kingstown officials are also working with the Horsley Witten Group and Dodson and Associates at all of the existing village centers in Town and two new proposed village centers to assess these areas for additional infill development to target future growth in both the Post Road district, at a very high density, and in these new and existing village centers for lower density mixed use development.

NORTHEAST CORNER OF INTERSECTION AT Rts. 2/102

There is an acre of commercial development at this location in North Kingstown, which is currently surrounded by land zoned for residential. However, an application from the owner of the property to the north—Rolling Greens Golf Course—for a change in zoning to allow additional commercial development on that property.

c. Exeter's Strengths

Exeter benefits from its unique mix of characteristics and local attractions, as well as from its geographic location relative to several significant regional centers.

Residential Community

Exeter's rural character, which includes expansive views of working farms, swaths of forest, and historic buildings, is its defining feature and one of its primary residential draws. Residents also remark on the lower cost of property compared to Greenwich and Warwick, its relative proximity to jobs and services in greater Providence (30 minutes), as well as its proximity to beaches and other recreational opportunities. Finally, Exeter's schools, which are supported in cooperation with West Greenwich, are assets that receive solid support from the community.



A historic mill in Exeter

Attractions within Exeter

Exeter also boasts several attractions that draw visitors to town.

YAWGOO SKI & WATER PARK

Located on Yawgoo Valley Road, this recreational area has operated in Exeter for decades and is referred to by locals, with affection, as the “Great White Babysitter.” Yawgoo operates approximately six months each year, offering skiing and snow tubing for four months during the winter (weather permitting) and operating a water park for two months during the summer. Skiing and snowtubing attract between 20,000 and 40,000 visitors from the region, while the water park attracts between 25,000 and 30,000 visitors. (Though only operational six months each year at most, Yawgoo is the 3rd or 4th highest tax payer in the town.)

RHODE ISLAND VETERANS CEMETERY

The Division of Veterans Affairs maintains the 265-acre Rhode Island Veterans Cemetery, located at 301 South County Trail (Route 2) in Exeter. Visitors come from across the state to visit loved ones buried there and while DVA keeps no counts on average number of visitors, staff report that the cemetery receives many visitors.

LOCAL SERVING RETAIL

Exeter’s farm stands—Schartner Farms being the most well known—attract visitors to town, including commuters on Route 2.

Passing through Exeter

Exeter’s geographic location—specifically the segment of Route 2 that passes through the town—relative to other residential communities and job/education centers places it on several different commuting paths. And Exeter’s proximity to these job/education centers may make it an attractive place for more residents in coming years.

UNIVERSITY OF RHODE ISLAND - KINGSTON

The University of Rhode Island’s flagship campus is located in Kingston, which is approximately 7 miles south of Schartner Farm by road. With nearly 15,000 students enrolled at URI-Kingston, it is also a significant employment center. Many commuting from the north take Route 2 to bypass Routes 4 and 1.

SOUTH COUNTY

Route 2 also serves those commuting from communities in the southern portion of Washington County—“South County”—north to Warwick and Providence. The largest of these residential communities is South Kingstown, which includes Narragansett and Wakefield.



University of Rhode Island,
Kingston

d. Constraints

Regional Competition

The competition from existing and planned retail and commercial outlets in the region is a major constraint of the viability of a Village Center at the preferred location at the intersection of Route 2 and Exeter Road.

Retail and commercial competitors include:

- Existing Regional Center, Route 4/102
- Wickford Village
- Warwick Mall / Route 2 Commercial
- Possible North Kingstown Town Center(s)

There is also the URI - Narragansett Commuter Connection, whereby Narragansett provides housing for many of the URI students living off site.

When considering a site for possible commercial or mixed-use development a developer will consider the regional context and existing competition to evaluate the potential demand for the proposed center. Right now there are many options serving potential consumers, which may disuade a developer from committing investment in new Exeter locations at this time under current local conditions.

Low Town Density Constrains Demographics

As mentioned earlier in the report, commercial developers from the area report that national franchise managers often view Exeter's demographics negatively. From their perspective, its small population spread relatively thinly across the region does not provide enough of a critical mass of consumers to justify their investment in the area.

The ability for Exeter to reach the demographic threshold that would make the Town more attractive to regional franchise managers is now constrained by the town's low density zoning requirements—specifically its one unit per 3 to 4 acres residential requirement. Without the ability to increase residential density in certain areas, such as a Village Center, Exeter's demographics will remain unattractive to many commercial and mixed-use developers.

Existing Zoning Constrains Future Demand

Alluded to in the previous section, Exeter's current low density residential zoning ordinance will make it difficult for the Town to attract enough new residents and consumers to increase demand to a level that will be attractive to commercial and mixed-use developers.

When compared to the Post Road Corridor density of 30 units/acre, continuation of the 3 or 4 acre zoning in Exeter would require 90 to 120 acres to add 30 units.

Lack of Infrastructure & Services

The lack of a public water supply and sewerage infrastructure is a major constraint on future mixed use and commercial/retail development of any kind. The up front costs required of developers to install such infrastructure are a major deterrent, when compared to other sites where such infrastructure is available.

Significant Amount of new Office and Retail space already permitted within Exeter

Local developers already have a projects comprised of office, retail, and some residential planned and permitted along a 1.5 mile segment of Route 2, beginning just half a mile south of Exeter Road. These projects will take time to complete and lease up and would provide more immediate competition to a Village Center.

These planned and existing projects include:

Oak Harbor Village (North / South)

Oak Harbor Village is a 20-acre commercial development (very limited on-site residential, although more is planned) on Route 2 that is 85% built out. Anchored by a Mobil gas station, the shopping center also features local serving retail outlets, including a Dunkin Donuts, Subway, day care, an optometrist, and a consignment shop, among others. The developer-owners would like to attract a bank, pharmacy, or grocery, but so far have been unsuccessful because the area has “the wrong demographics,” according to national franchise managers with whom they have spoken.

Despite the hurdles of building and financing water and sewerage infrastructure, as well as its own fire suppression system, the owners attribute Oak Harbor’s modest, but continued success to commuter traffic and location and their plans to expand are advanced.

They intend to develop the 20-22 acre site south of existing Oak Harbor as a mixed-use, service oriented expansion, which will also include a significant residential component. Construction of a 64-bed alzheimers care facility is scheduled to begin in Spring 2011, and there are plans to build multi-family, rental residential apartments at the back of the property to fill existing demand for rental apartments in Exeter.

Deer Brook Residential

Deer Brook Estates is a new residential development located one mile south of the Rhode Island Veterans Cemetery that includes 130 units (.25 acre lots) clustered on 84 acres of a 164-acre parcel just west of Route 2. The development is served by private roads and includes 64 single family homes clustered at one end of the development and 66 townhouse units (two units per townhouse, but each limited to a single floor, target market 55+) clustered at the other end. Despite the national recession, these “woman-oriented” units have been selling, suggesting that a market for this type of product—smaller, clustered units within a community— exists in Exeter.

Liberty Hill Office Park

The first phase of the Liberty Hill Office Park consists of one 15,000 sf structure that features 1,000 sf to 2,000 sf office condo spaces intended for occupation by professionals, such as doctors, lawyers, and engineers. The two story building is designed as walkout. The up front costs, which included sewerage and water supply, were a challenge, but are now in place for the remainder of the development; the developer has secured permits for an additional 85,000 sf of office space, although no tenants are committed at this point.

Sports Park / Land Bank

A land owner has landbanked property intended for residential use, across from Oak Harbor Village, and now uses it for a driving range and batting cage operation.

4 | Recommendations

Stemming from Exeter’s participation in the Village Innovation Project, a series of studies and workshops resulted in the recommendation for the town of Exeter to focus future growth and development into a new “Village Center.” A preferred site was selected at a September 2010 town meeting.

As requested by the Town of Exeter, ULI Boston organized a one-day Technical Assistance Panel (TAP) to evaluate the feasibility of the Village Center concept, and develop recommendations for implementation of this concept. ULI Boston concluded that that a more feasible and attractive option is available to the Town of Exeter.

The following describes our analysis of the proposed concept and our recommendations for an alternative approach.

a. The Village Center Approach

The conditions necessary to attract and sustain a successful village center project include:

- Publicly provided water and sewer;
- A mix of housing types—and affordability ranges, including townhomes, townhouse, apartments, and condos;
- Local serving retail at a scale that is similar to Oak Harbor;
- Higher density housing within a mile of the site (e.g. that produced by quarter acre zoning);
- Lack of competition from other developments for this type of product in the market area;
- Zoning that supports these uses;

Most of these conditions currently do not exist and creating this environment will likely be a long term effort by the Town with support from the community. Based on our observations a “sea of change” within the Town will likely be needed to support the proposed development of a Village Center.

Assuming these necessary conditions were favorable and did exist, one of the critical findings discovered during the interview process is the proposed possible location for North Kingston’s town center on the Northeast corner of Route 2 and 102, found directly adjacent to Exeter’s town line. If this town center were to be developed our recommendation might be to locate a Village Center in the Northwest corner.

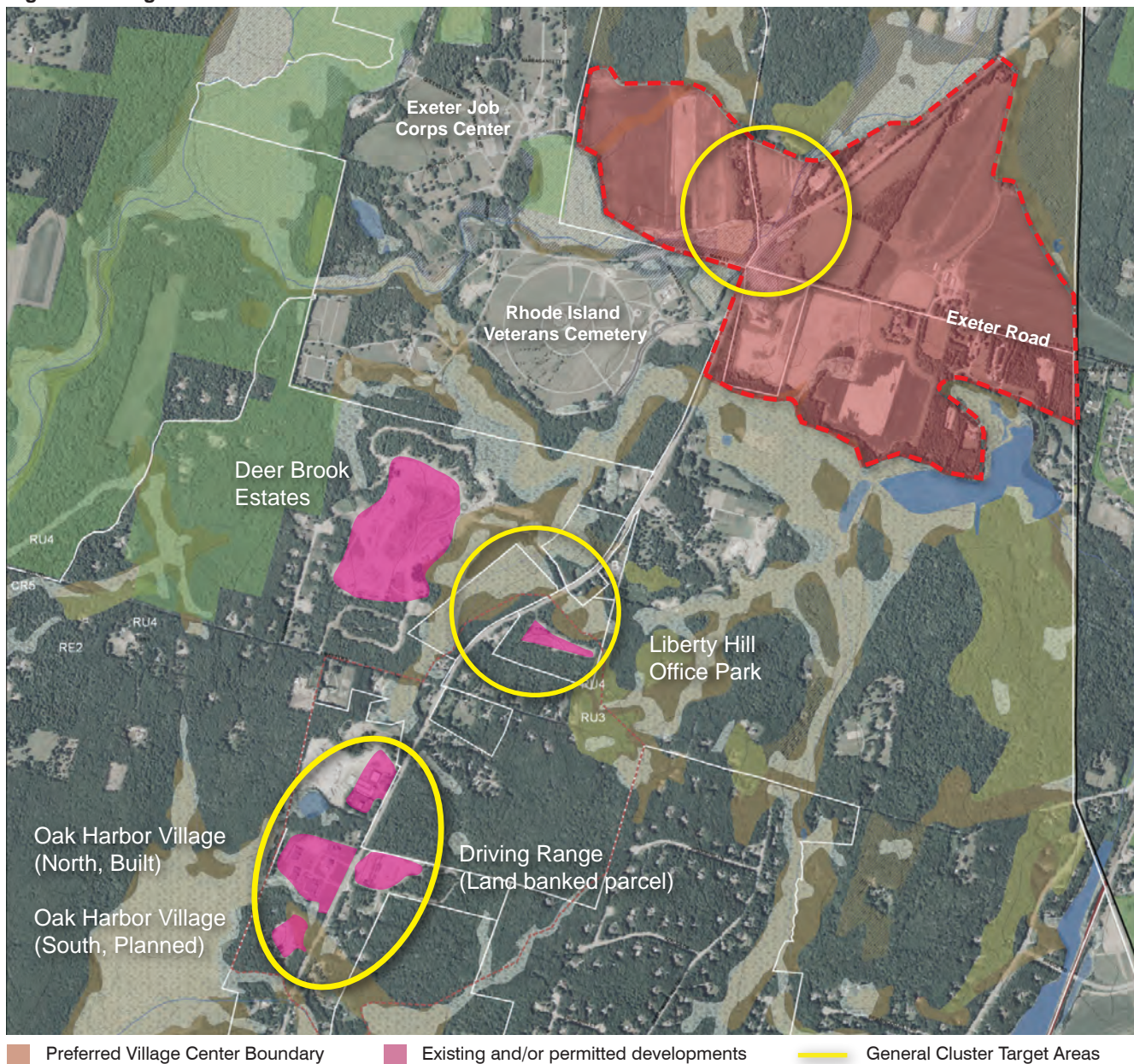
Given the existing competition, the future competition, and the potential for similar Village Center projects in North Kingstown, where planning is further along in terms of rezoning and installation of public utilities, the success of the Village Center concept seems unlikely. We would not recommend pursuing Village Center concept as proposed.

Refocusing on the town's stated goals:

- Corral residential and commercial development;
- Preserve open space and farm land through well managed, denser development;
- Provide alternative housing options from the single family, detached units;
- Create a true "center" for Exeter.
- Improve tax base
- Improve public services (police and fire)

It appears many of these goals could be realized by concentrate efforts on strengthening existing developments

Figure 6: Village Clusters



b. An Alternative: The “Clustered Villages” Approach

We recommend that the Town of Exeter focus on a series of shorter term goals in encouraging completion of developments that have already been undertaken, especially as these primarily involve commercial uses that can help strengthen the Town’s tax base. Further development around these completed commercial nodes may be easier to facilitate and could incrementally create a cluster of smaller town centers along Route 2.

Enhance Existing Commercial & Retail Clusters

There is the potential for a significant amount of commercial and office space to online between the planned expansion of Oak Harbor Village and the additional 85,000 sf of office space permitted at Liberty Hill Office Park. The Town’s efforts to create facilitate centralized retail “village” development might be better spent supporting and enhancing this existing development, as well as future permitted development that occurs in these areas.

Review and Revise Zoning Code

To support existing planned development a critical next step should be a thorough review of the Town’s zoning code and subdivision regulations.

1. LOOKING TOWN-WIDE

Zoning dictates the uses, form, and location of future development and if development occurs, a town will ultimately get that for which it has zoned. Exeter is well along in a collective discussion of its future vis-a-vis development. The Town should bring this discussion to the next step and look comprehensively at its zoning code, so that the code reflects consensus around the future.

2. CLUSTERING DEVELOPMENT

Zoning review would include looking closely at those areas where future clustering of development around existing nodes on Route 2 could occur. Possibilities to investigate may include overlay zones, which could provide for an additional level of requirement and review to support the existing and possibly expanded retail clusters.

3. SCENIC HIGHWAY

Route 102 is now recognized by the State of Rhode Island as a scenic highway, but its use and renovation are governed by a RI DOT ordinance. To protect the character of this road it is critical to ensure that zoning along Route 102 supports development that is in keeping with the desired character (e.g. prohibits commercial strip development).

4. PROTECTING OPEN SPACE / FARMLAND

The Town should continue its efforts to protect open space and farmland. This effort would also benefit from a comprehensive look at existing zoning.

Closely Track other Regional Scale Projects

As the Town weighs its options regarding development, tracking adjacent Regional projects may provide development opportunities for the Town of Exeter.

Develop Infrastructure to/at Site

Should the Town of Exeter choose to facilitate development at the Route 2/Exeter Road site, or other sites, it will be important that that Town invest in public infrastructure, including water and sewerage to encourage development.