



MASTER PLAN & ZONING COMMITTEE
City of Novi Planning Commission
March 5, 2009 at 7:00 p.m.
Novi Civic Center – Mayor’s Conference Room
45175 W. Ten Mile, Novi, MI 48375
(248) 347-0475

Members: Victor Cassis, Andy Gutman, Michael Lynch and Michael Meyer
Alternate David Greco
Staff Support: Mark Spencer

1. **Roll Call**
2. **Approval of Agenda**
3. **Audience Participation and Correspondence**
4. **Election of Chair and Vice Chair**
5. **Matters for Discussion**

Item 1

Master Plan for Land Use Review

- a) General Information
 - Commercial Land Use Facts
 - Retail Demand Forecast (with Dwelling Unit Forecast) (packet to be posted Monday)
- b) Special Planning Project Area 1
 - Land Use Review
- c) Sections 1, 2, 11 & 12 potential studies/changes

6. **Schedule/Future Agenda**
Next Meeting 3/19/09
7. **Adjourn**



PLAN REVIEW CENTER REPORT

Updated February 24, 2009

Special Project Planning Area 1

Summary and Alternatives Report

Property Characteristics

- Site Location: South side of Ten Mile Road east of Novi Road
- Site Zoning: OS-1, Office Service and I-1, Light Industrial
- Adjoining Zoning: North: Ten Mile Road, I-1, R-4 and B-3 (all across Ten Mile Road); East: RM-1, R-4 (further east); West: B-1 along Novi Road, OS-1 (across Novi Road); South: RM-1, I-1
- Site Use(s): Vacant
- Adjoining Uses: North: Ten Mile Road, Speedway Gas Station, various industrial uses, private park, Meadowbrook Glens subdivision (all across Ten Mile Road); East: Novi Ridge Apartments, Orchard Hills West subdivision and Orchard Hills Elementary (further east); West: Novi Road, Walgreens, various office (across Novi Road); South: Novi Ice Arena (further south), Sports Club of Novi, River Oaks Apartments
- Existing Master Plan Designation: Special Planning Project Area 1, Office, Light Industrial
- Site Size: 81 acres (formerly 64 acres, property east of the railroad included at the property owner's request)

Property History

The area defined in the Master Plan as Special Planning Project Area 1 in the 2004 Master Plan for Land Use is located on the south side of Ten Mile Road, just east of Novi Road in Section 26 of the City of Novi and totals approximately 26 acres. The Special Planning Project Area 1 (identified in white on the adjacent figure) is part of two larger parcels of land. The Master Plan is seen as a guiding document for the City to aid in development patterns and evaluating rezoning applications. Given the fact that the City is very hesitant to rezone portions of a parcel and the parcels that comprise and extend beyond Special Planning Project Area 1 are likely to develop as entire parcels, this report proposes and evaluates development options for the entirety of both parcels, hereafter referred to as the "Study Area" (identified in pink on the adjacent figure). The parcel east of the railroad tracks was included as part of Study Area at the



owner’s request and with the approval of the Master Plan and Zoning Committee. The Study Area is presently vacant after Erwin Orchards closed their apple orchard and sold the property over thirty years ago.

The present zoning of the Study Area can be seen below in Figure 2. The zoning is split between OS-1, Office Service and I-1, Light Industrial. The surrounding zoning is I-1, I-2 (General Industrial), R-4 (One-Family Residential) and B-3 (General Business) across Ten Mile Road, with a parcel of B-1 zoning directly north of the northwestern portion of the Study Area. I-1 and RM-1 (Low-Density Low Rise Multiple-Family) zoning lie to the south. RM-1 zoning is adjacent to the Study Area to the east. B-1, OS-1 and R-4 zoning border the west side of the Study Area across Novi Road.

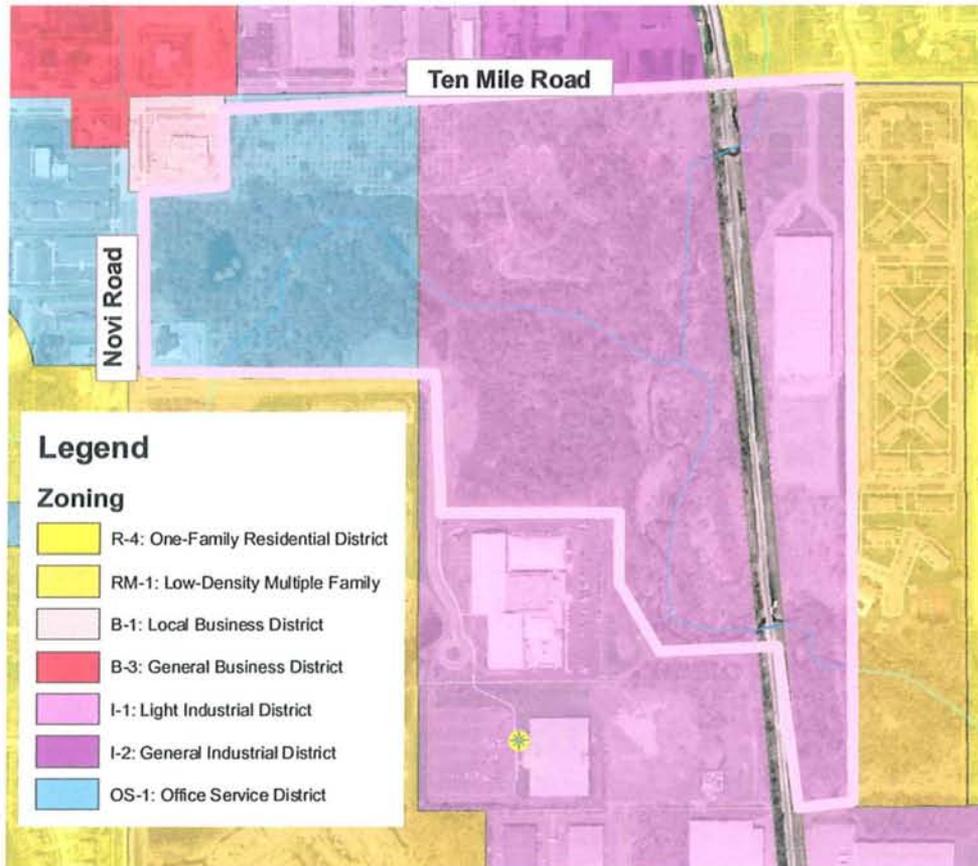


Figure 2: Current Zoning

Master Plan Designations

A brief summary of previous Master Plan designations for the Study Area can be found in the table below.

Master Plan Update	1980	1988	1993	1999	2001*	2004
Land Use Designation of Study Area	Office/Light Industrial	Office/Light Industrial	Office/Light Industrial	Local Commercial/Light Industrial	Special Planning Project Area 1**	Special Planning Project Area 1**

*Novi Road Corridor Study

** Some portions designated for Office and Light Industrial Uses

As seen above, the Study Area was designated for office and light industrial uses for a considerable time and was briefly designated as local commercial along with light industrial. The light industrial designation has generally been centered around the existing railroad track bordering the eastern side of the Study Area. In 2001, the City completed the Novi Road Corridor Study. This Study updated portions of the 1999 Master Plan for Land Use, including the Study Area. The Novi Road Corridor Study recommended the Master Plan designation for the Study Area be changed from Local Commercial/Light Industrial, as recommended by the 1999 Master Plan to Special Planning Project Area 1. The "Special Planning Project Area 1" designation was the result of lingering questions that needed to be further explored, mainly whether or not commercial was appropriate for this area and how much was suitable as well as infrastructure concerns, mostly with the intersection of Ten Mile Road and Novi Road, which has since been upgraded. The 2004 Master Plan carried over this designation and recommended further analysis of the Study Area.

The most current Master Plan designations for the Study Area and the surrounding properties are shown below in Figure 3. Some portions of the Study Area are designated for office and light industrial uses. Light Industrial, Heavy Industrial, Local Commercial, Private Park and Single Family uses are planned for the properties across Ten Mile Road to the north of the Study Area with Local Commercial adjacent as well. Light Industrial and Multiple Family uses are planned for the properties directly south of the Study Area with Public uses (Novi Ice Arena) shown further south. Multiple Family uses are planned for the property directly east of the Study Area with Single Family planned further east. Lastly, Office uses are shown west of the Study Area, across Novi Road.



Figure 3: Current Master Plan Designations

Recent Submittals

Two separate applications for rezoning portions of the Study Area to B-2 and RM-2 were presented to the City for consideration in 2004. The first application proposed rezoning a large part of the Study Area to RM-2 to facilitate the construction of 99 attached condominium units on the southern portion of the property. This application was ultimately abandoned by the applicant without review by the Planning Commission or City Council. The second application proposed rezoning the northern portion of the Study Area (mainly the Ten Mile Road frontage) to B-2 to accommodate the construction of 141,384 square feet of commercial space and four out lots. This proposed rezoning was in conjunction with a Planned Rezoning Overlay. The proposal appeared before the Planning Commission in October of 2004 where a recommendation was postponed, mainly because of the lack of an identified public benefit. No other action was taken on the application after this postponement.

Recently, the owner of the property has met with City Staff to discuss the possibility of rezoning portions of the property to B-2 with the balance of the property remaining zoned I-1 and OS-1 in order to develop an approximately 41,000 sq. ft. retail center, a 64,000 sq. ft. grocery store and seven associated outlots comprised of three medical office buildings, two restaurants, a bank and a retail store. The applicant has met with the Master Plan and Zoning Committee but no formal submittals have taken place thus far.

Suggested Alternatives

Staff suggests the following alternatives be considered for the Study Area. Other alternatives could be explored based on the input from the Master Plan and Zoning Committee. It is our recommendation that any proposed development avoid the natural wetland and woodland areas to every extent possible. This would help the City work towards one of the goals set forth in the 2004 Master Plan, "Protect Novi's remaining woodlands and wetlands." Please see the alternatives described on the following pages.

Alternative 1: Master Plan Designation to Office and Light Industrial

Alternative 1 proposes designating the Study Area for Office and Light Industrial uses following the present zoning of the property, with office uses concentrated near Ten Mile Road and Novi Road and industrial uses east of the railroad tracks and in the rear of the property. Considering the zoning ordinance standards regarding parking, setbacks, etc. a light industrial warehouse of approximately 280,000 sq. ft. could be accommodated on the rear portion of the property. The western and northern (OS-1) portion of the Study Area could accommodate up to 103,000 sq. ft. of office space either in a single large building or divided between two or more buildings. The property east of the railroad tracks could accommodate a moderately sized light industrial use or office space. The scenario would leave significant natural areas of the Study Area undeveloped, mostly on the southern end of the property. The office and light industrial designations would complement the future land uses (office and industrial) proposed for the properties on the northern side of Ten Mile Road and the western side of Novi Road.



Alternative 2: Master Plan Designation to Multiple Family

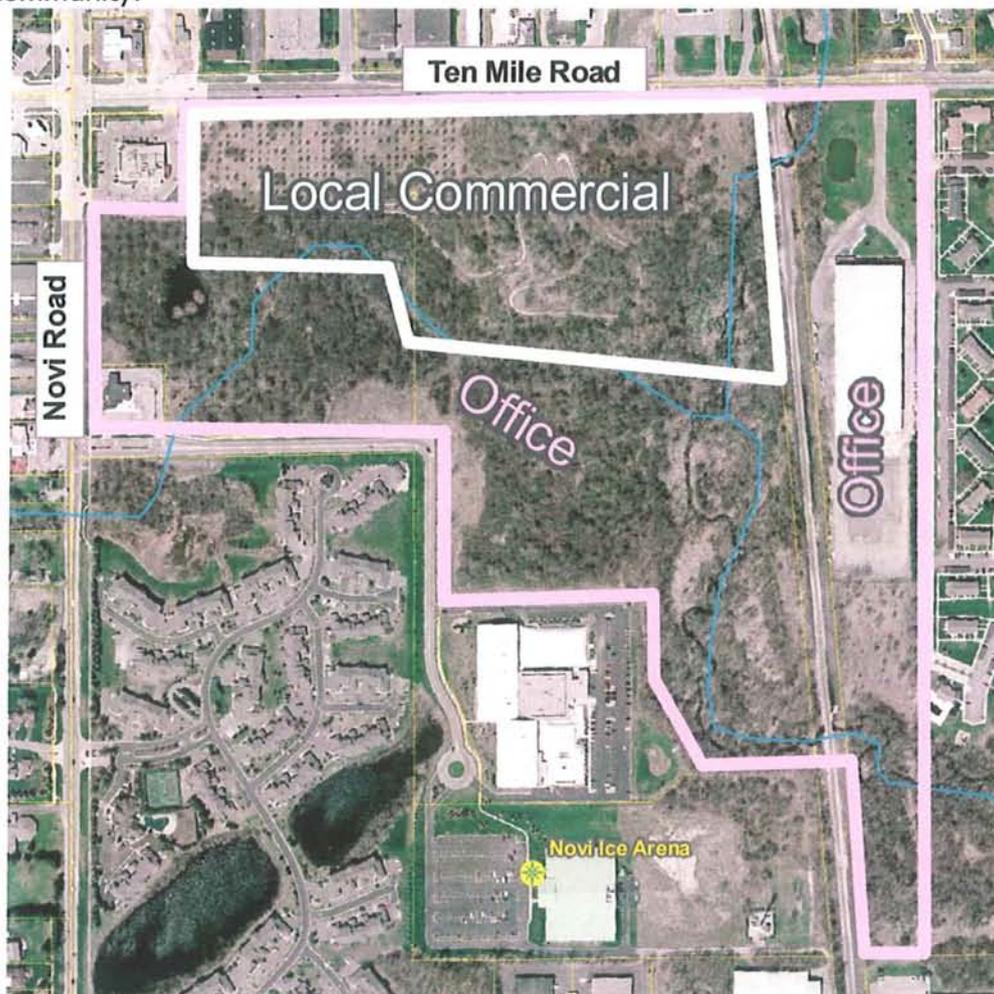
Alternative 2 proposes designating the Study Area for Multiple Family uses consistent with the density of RM-1 (Low Density, Low-Rise Multiple-Family District). The Master Plan includes recommendations for residential densities. Densities allowed in the RM-1 District range from 10.9 units/acre to 5.4 units/acre. The developed RM-1 properties nearest to the Study Area are designated in the Master Plan for densities of 7.3 units/acre and 7.9 units/acre. Considering the proximity of nearby single-family residential neighborhoods and the aforementioned already established RM-1 density recommendations, staff would recommend setting a density of 7.3 units/acre for the Study Area. Based on this recommended density, if the Study Area were ultimately rezoned to the RM-1 District, a development of a maximum of 343 dwelling units could be accommodated depending on the size of the dwelling units. This alternative would also leave a large part of the natural areas on the southern portion of the Study Area undeveloped. The multiple family classification would be consistent with the adjacent multiple-family designation to the south of the Study Area and the designation further east of the Study Area.

A significant hurdle to the development of the properties as a multiple family complex would be the adjacent railroad tracks. Any residential development would have to be setback a significant distance from the existing tracks due to both the safety risks that exist with potential train derailments and to buffer potential residents from the noise and vibrations of a passing train. Although no specific standards could be found for CSX rail lines, the Canadian National Rail does have land use guidelines that recommend residential structures be set back at least 100 feet from all main lines and 50 feet from branch lines. In addition a noise attenuation barrier of at least 13 feet from the top of rail is recommended as well as a safety berm. Other recommendations include vibration isolation features and a provision inserted into all development agreements, purchase offers and lease agreements warning buyers of the potential adverse impacts that could result from living near a rail line. Per Section 2400 of the Zoning Ordinance, I-1 uses must be set back at least 100 feet from adjacent residential zoning. I-1 zoning borders the southern end of the study area and the required 100 foot setback would limit the developable area of the adjacent properties.



Alternative 3: Master Plan Designation to Office and Local Commercial

Alternative 3 proposes designating the Study Area for Office and Local Commercial Uses. This would permit a rezoning to B-1 (Local Business District) or B-2 (Community Business District), as was proposed by the applicant in 2004. In this alternative, the Ten Mile Road frontage would be designated for commercial use with the rear of the property and the Novi Road frontage designated for office use. Local commercial uses permitted would include grocery stores, drug stores, personal service businesses (salons, barber shops, repair shops, etc.), banks, hotels, day care centers and instructional centers for dance, art, etc. If a portion of the Study Area were ultimately rezoned to the B-1 or B-2 District with the balance of the property remaining OS-1, a development of approximately 75,000 sq. ft. of office space and 125,000 sq. ft. of commercial space could be constructed. This scenario also leaves a large part of the southern section of the Study Area undeveloped in order to preserve the natural features on site. This office portion of Alternative 3 would complement the office designation on the western side of Novi Road. The commercial portion of Alternative 3 would provide local commercial services for nearby residents. However, it is important to note that a population of at least 10,000 people would be required to support 100,000 sq. ft. of retail space. There are presently some commercial services available on Ten Mile Road, mainly centered around the intersection of Ten Mile Road and Meadowbrook Road, approximately $\frac{3}{4}$ of a mile east of the Study Area. The properties on the northeastern, northwestern and southeastern corners of the intersection of Ten Mile Road and Novi Road are master planned for local commercial uses. Please see the updated retail analysis that was prepared by the Plan Review Center for more information about retail needs in the community.



Compatibility with Surrounding Land Uses

The following table summarizes the zoning and land use status for the subject property and surrounding properties.

**Land Use and Zoning
For Subject Property and Adjacent Properties**

	Existing Zoning	Existing Land Use	Master Plan Land Use Designation
Subject Site	OS-1, Office Service I-1, Light Industrial	Vacant	Special Planning Project Area 1, Office, Light Industrial
North Parcels	I-1, Light Industrial (across Ten Mile Road), B-3 (across Ten Mile Road), R-4, One-Family Residential (across Ten Mile Road)	Ten Mile Road, Speedway Gas Station (across Ten Mile Road), Various industrial uses (across Ten Mile Road), Private Park, Meadowbrook Glens Subdivision (across Ten Mile Road)	Local Business, Light Industrial, Heavy Industrial, Private Park, Single Family
Eastern Parcels	RM-1, Low Density, Low-Rise Multiple-Family Residential, R-4, One-Family Residential (further east)	Novi Ridge Apartments, Orchard Hills West Subdivision, Orchard Hills Elementary (further east)	Multiple Family, Single Family, Educational Facility
Southern Parcels	RM-1, Low Density, Low-Rise Multiple-Family Residential I-1, Light Industrial	Novi Ice Arena, Sports Club of Novi, River Oaks West Apartments, Harada Industry of America	Light Industrial, Public, Multiple Family
Western Parcels	B-1, Local Business OS-1, Office Service (across Novi Road)	Novi Road, Walgreens, Various office uses (across Novi Road)	Office (across Novi Road), Local Commercial

The compatibility of any proposed master plan designation with the master plan designation, zoning and uses on the adjacent properties should be considered.

Directly to the north of the subject property, across Ten Mile Road are an existing Speedway Gas Station, various industrial uses and a private park and single family residences (east of the railroad tracks). The properties to the **north** are zoned B-3 (General Business), I-1 (Light Industrial), I-2 (General Industrial), and R-4 (One-Family Residential) and are master planned for local business, light industrial, heavy industrial, private park and single family uses. A master plan designation of office and light industrial for the Study Area would complement the existing industrial zoning and designation on the northern side of Ten Mile Road. A master plan designation of multiple family for the Study Area could clash with the industrial uses, unless buffered properly. A master plan designation of office and local commercial uses for the Study Area would not significantly affect the existing uses. The area designated as a private park and for single family uses (currently occupied by the Meadowbrook Glens Subdivision) would most likely see increased traffic along 10 Mile Road as a result of any development within the project area. However, it is important to note that there is currently an existing apartment building across the street from the subdivision and the redevelopment

of that parcel would not adversely impact the existing homes anymore than the current apartment building does.

The properties to the **east** of the subject property are the Novi Ridge Apartments and the Orchard Hills West Subdivision, east of the Novi Ridge Apartments. These properties are zoned RM-1 (Low Density Low-Rise Multiple-Family Residential) and R-4 (One-Family Residential) respectively and are master planned for multiple family, single family and educational uses. A master plan designation of office and light industrial for the Study Area could act as an appropriate transitional use for the existing multiple family. A master plan designation of multiple family for the Study Area would complement the existing multiple family to the east. A master plan designation of office and local commercial would not significantly affect the existing uses and could also act as a good transitional use to the existing multiple family, although residents to the east are likely to be concerned about additional traffic along Ten Mile Road.

The properties to the **south** of the subject property are the Sports Club of Novi, River Oaks West Apartments and Harada Industry of America (east of the railroad tracks). These properties are zoned I-1 (Light Industrial) and RM-1 (Low Density Low-Rise Multiple-Family Residential) and are master planned for light industrial and multiple family uses. A master plan designation of office and light industrial for the Study Area would complement the existing industrial zoning and designation bordering the southeastern portion of the Study Area. The proposed office designation on the southwestern portion of the Study Area would not negatively affect the multiple family development. A master plan designation of multiple family for the Study Area could clash with the industrial zoning and designation directly south of the Study Area if the specific use were to change from a sports club to a manufacturing facility. A multiple family designation would complement the existing multiple family designation bordering the southwestern portion of the Study Area. A master plan designation of office and local commercial would not significantly affect the existing uses, although residents to the south could be concerned about additional traffic along Ten Mile Road.

The properties to the **west** of the subject property are various office uses across Novi Road and an existing Walgreens store directly west of the Study Area. These properties are zoned OS-1 (Office Service) and B-1 (Local Business) respectively and are master planned for office and local commercial uses. A master plan designation of office and light industrial for the Study Area would likely have little effect on the existing uses west of the Study Area, although the office designation on the eastern side of Novi Road would complement the existing office uses, zoning and designation on the western side of Novi Road. A master plan designation of multiple family for the Study Area would likely have little effect on the existing uses. A master plan designation of office and local commercial would not significantly affect the existing uses, although, once again the office designation on the eastern side of Novi Road would complement the existing office uses, zoning and designation on the western side of Novi Road.

The development of the Study Area under any zoning district would most certainly add traffic to the area, which would vary greatly depending on the ultimate use of the property. The need for a Traffic Impact Study or Assessment would be evaluated at the time of a formal rezoning or site plan application. Both Novi Road and Ten Mile Road have been upgraded to five lanes within the last five years and these intersection improvements could most likely accommodate the larger traffic volumes that would result from the development of the subject property.

Comparison of Zoning Districts

The following table provides a comparison of the proposed zoning classifications for each proposed master plan designation and corresponding zoning district.

	B-1 Zoning (Alternative 3)	B-2 Zoning (Alternative 3)	RM-1 Zoning (Alternative 2)	OS-1 Zoning (Alternative 1 and 3)	I-1 Zoning (Alternative 1)
Principal Permitted Uses	<ol style="list-style-type: none"> 1. Generally recognized retail businesses which supply commodities on the premises, such as but not limited to: groceries, meats, dairy products, baked goods or other specialty food products (excluding restaurants), drugs, dry goods, clothing and notions or hardware. 2. Personal service establishments which perform services on the premises, such as but not limited to: repair shops, tailor shops, beauty parlors or barbershops, photographic studios and self-service laundries and dry cleaners. 3. Dry cleaning establishments, or pick-up stations, directly dealing with the consumer. 4. Business establishments which perform services on the premises, such as but not limited to: banks, loan companies, insurance offices and real estate offices. 5. Professional services including the following: offices of doctors, dentists and 	<ol style="list-style-type: none"> 1. Any retail business or service establishment permitted in the B-1, Local Business District. 2. All retail business or service establishment uses as follows: <ol style="list-style-type: none"> a. Any retail business whose principal activity is the sale of merchandise in an enclosed building. b. Any service establishment of an office, showroom or workshop nature of a decorator, dressmaker, tailor, bridal shop, art gallery, interior designer or similar establishment that requires a retail adjunct. c. Restaurants (sit down), banquet facilities or other places serving food or beverage, except those having the character of a drive-in or drive-through window. d. Theaters, assembly halls, concert halls, museums, or similar places of assembly when conducted completely within enclosed buildings. e. Business schools and colleges or private schools operated for profit. 3. Day Care Centers and Adult Day Care Centers. 4. Private clubs, fraternal organizations and lodge halls. 5. Hotels and motels, provided the site does not abut a residential district. 6. Office buildings of any of the following occupations: 	<ol style="list-style-type: none"> 9. All uses permitted and as regulated in the RT Two-Family Residential district. 10. Multiple-family dwellings. 11. Independent and congregate elderly living facilities as defined by Section 201 and subject to the requirements of this section. 12. Accessory buildings and uses customarily incident to any of the above permitted uses. 	<ol style="list-style-type: none"> 1. Office buildings for any of the following occupations: executive, administrative, professional, accounting, writing, clerical, stenographic, drafting and sales. 2. Medical office including laboratories and clinics. 3. Facilities for human care such as general hospitals, sanitariums, convalescent homes, hospice care facilities and assisted living facilities subject to certain conditions. 4. Banks, credit unions, savings and loan associations and similar uses with drive-in facilities as an accessory use only. 5. Personal service establishments including barbershops, beauty shops and health salons. 6. Off-street parking lots. 7. Churches. 8. Other uses similar to the above uses. 9. Accessory structures and uses. 10. Publicly owned and operated parks, 	<ol style="list-style-type: none"> 1. Office buildings, offices and office sales and service activities for any of the following occupations: executive, administrative, professional, accounting, writing, clerical, stenographic, drafting, sales and engineering, data processing and for activities related to laboratories research and development; corporate offices and headquarters and office support functions, such as conference rooms, dining facilities, photographic facilities and storage facilities. 2. Publicly owned and operated parks, parkways and outdoor recreational facilities.

	B-1 Zoning (Alternative 3)	B-2 Zoning (Alternative 3)	RM-1 Zoning (Alternative 2)	OS-1 Zoning (Alternative 1 and 3)	I-1 Zoning (Alternative 1)
	<p>similar or allied professions.</p> <p>6. Post office and similar governmental office buildings.</p> <p>7. Off-street parking lots.</p> <p>8. Instructional centers for music, art, dance, crafts, martial arts, exam preparation and similar instruction.</p> <p>9. Other uses similar to the above uses.</p> <p>10. Accessory structures and uses.</p>	<p>executive, administrative, professional, accounting, writing, clerical, drafting, sales and medical offices, including laboratories and clinics.</p> <p>7. Other uses similar to the above uses.</p> <p>8. Accessory structures and uses customarily incident to the above permitted uses.</p>		<p>parkways and outdoor recreational facilities.</p>	
Special Land Uses	<p>1. Mortuary establishment subject to specific conditions.</p> <p>2. Publicly owned buildings, telephone exchange buildings, electric transformer stations and substations, gas regulator stations with service yards, water and sewage pumping stations.</p>	<p>1. Gasoline service station subject to certain conditions.</p>	<p>2. Convalescent homes, assisted living facilities, hospice care facilities and child care centers (subject to specific conditions).</p> <p>3. Accessory building and uses customarily incident to any of the above permitted uses.</p>	<p>1. An accessory use customarily related to a principal use authorized by Section 1102, such as but not limited to: a pharmacy or apothecary shop, stores limited to corrective garments or bandages or optical service.</p> <p>2. Mortuary establishments subject to certain conditions.</p> <p>3. Publicly owned buildings, telephone exchange buildings and public utility offices but not including storage yards, transformer stations or gas regulator stations.</p> <p>4. Day Care Centers and</p>	<p>Special Land Uses when Abutting a Residential District:</p> <p>1. Research and development, technical training and activities limited to the specific industries listed in Section 1902.1.</p> <p>2. Data processing and computer centers limited to the specific activities listed in Section 1902.2.</p> <p>3. Warehousing and wholesale establishments.</p> <p>4. The manufacture, compounding, processing, packaging or treatment of products.</p> <p>5. The manufacture, compounding, assembling or treatment of articles of merchandise from previously prepared materials listed in Section 1902.5.</p>

B-1 Zoning (Alternative 3)	B-2 Zoning (Alternative 3)	RM-1 Zoning (Alternative 2)	OS-1 Zoning (Alternative 1 and 3)	I-1 Zoning (Alternative 1)
			<p>Adult Day Care Centers subject to certain conditions.</p> <p>5. Public or private indoor recreational facilities and private outdoor recreational facilities.</p>	<p>6. The manufacture of pottery and figurines or other similar ceramic products subject to certain conditions.</p> <p>7. Manufacture of musical instruments, toys, novelties and metal or rubber stamps.</p> <p>8. Manufacture or assembly of electrical appliances, electronic instruments and devices, radios and phonographs.</p> <p>9. Manufacturing and repair of electric or neon signs and light sheet metal products.</p> <p>10. Industrial office sales, service and industrial office related uses when located within an existing office building portion of an industrial use.</p> <p>11. Trade or industrial schools.</p> <p>12. Laboratories experimental, film or testing.</p> <p>13. Greenhouses.</p> <p>14. Public utility buildings, telephone exchange buildings, electrical transformer stations and substations and gas regulator stations other than outside storage and service yards.</p> <p>15. Public or private indoor recreation</p>

B-1 Zoning (Alternative 3)	B-2 Zoning (Alternative 3)	RM-1 Zoning (Alternative 2)	OS-1 Zoning (Alternative 1 and 3)	I-1 Zoning (Alternative 1)
				<p>facilities and private outdoor recreation facilities.</p> <p>16. Other uses of a similar or no more objectionable character.</p> <p>17. Accessory buildings and uses.</p> <p>18. Pet boarding facilities subject to certain conditions.</p> <p>Special Land Uses Permitted when Not Abutting a Residential District</p> <p>1. Auto undercoating shop when completely enclosed.</p> <p>2. Metal plating, buffing, polishing and molded rubber products subject to certain conditions.</p> <p>3. Uses which serve the limited needs of an industrial district including:</p> <p>A. Banks, savings and loan associations, credit unions, union halls and industrial trade schools or industrial clinics.</p> <p>B. Industrial tool and equipment sales, service, storage and distribution.</p> <p>C. Eating and drinking establishments and motels subject to certain conditions.</p> <p>4. Automobile service establishments and public garages subject</p>

	B-1 Zoning (Alternative 3)	B-2 Zoning (Alternative 3)	RM-1 Zoning (Alternative 2)	OS-1 Zoning (Alternative 1 and 3)	I-1 Zoning (Alternative 1)
					<p>to certain conditions.</p> <p>5. Self-storage facilities subject to certain conditions.</p> <p>6. Retail sales activities when ancillary to a permitted business and subject to certain conditions.</p> <p>7. Central dry cleaning plants or laundries subject to certain conditions.</p> <p>8. Railroad transfer, classification and storage yards.</p> <p>9. Tool, die, gauge and machine shops.</p> <p>10. Storage facilities for building materials, etc. subject to certain conditions.</p> <p>11. Municipal uses such as water treatment plants and reservoirs, sewage treatment plants and all other municipal buildings and uses.</p>
Maximum Density (Dwelling Units/Net Site Area)	N/A	N/A	<p>1 bedroom = 10.9 dwelling units/gross acre</p> <p>2 bedroom = 7.3 dwelling units/gross acre</p> <p>3 bedroom = 5.4 dwelling units/gross acre</p>	N/A	N/A
Building Height	1 story or 25 feet	2 stories or 30 feet	2 stories or 35 feet	30 feet	40 feet
Building Setbacks	Front: 20 feet Sides: 15 feet Rear: 20 feet	Front: 40 feet Sides: 30 feet Rear: 30 feet	Front: 50 feet Sides: 75 feet Rear: 75 feet	Front: 20 feet Sides: 15 feet Rear: 20 feet	Front: 40 feet Sides: 20 feet Rear: 20 feet

Infrastructure Concerns

Both water mains and sanitary sewer lines exist along Novi Road and Arena Drive. Any proposed development would logically connect to the existing lines. A full scale utility review would take place during the course of the Rezoning Review process and/or the Site Plan Review process.

The need for a Traffic Impact Study or Assessment would be evaluated at the time of a formal rezoning or site plan application. Both Novi Road and Ten Mile Road have been upgraded to five lanes within the last five years and these intersection improvements could most likely accommodate the larger traffic volumes that would result from the development of the subject property.

Wetlands

There are substantial regulated wetlands on the site, located mostly along the existing creek and in the southwest portion of the property, as indicated by Figure 4. The site contains small emergent-scrub shrub wetlands as well as higher quality forested and open-open water wetland. It is likely that any wetland impacts that result from a proposed development would require an MDEQ permit. Considering the quality of the on-site wetlands, avoidance of these areas would be the best option whenever this property is developed.



Figure 4: Wetlands

The site also contains a great deal of floodplain area associated with a tributary of the Rouge River, known as Chapman Creek. Any floodplain impacts would require mitigation and any buildings placed within the floodplain would require need to meet appropriate building standards for construction within a floodplain. Figure 5 shows the existing flood zone.

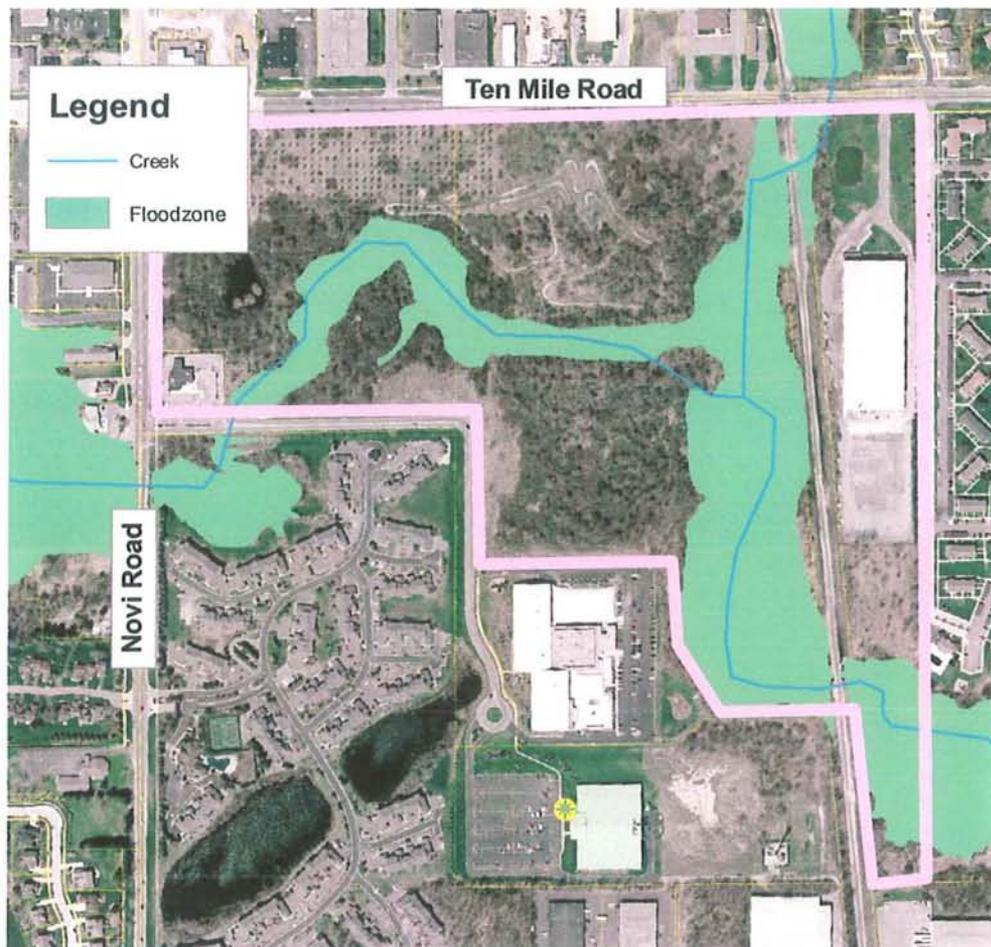


Figure 5: Flood Zone

Woodlands

The updated Woodlands map recently prepared by City staff and the City's environmental consultant, Environmental Consulting and Technology, Inc. is scheduled to go before the City Council in the coming weeks. Staff expects the revised map to be tentatively approved at that time. Therefore, Figure 6 is based on the boundaries shown by the updated Woodlands map. Based on the revised map, the site does contain regulated woodlands. Additional regulated woodland may occur beyond the generalized boundaries provided in the official woodlands map and the presence of regulated trees would need to be field verified once a formal site plan applicant is submitted. Staff would recommend that any proposed developments avoid regulated woodlands as much as possible.



Figure 6: Woodlands

Kristen Kapelanski

Report by Planner Kristen Kapelanski (248) 347-0586



MEMORANDUM

TO: PLANNING COMMISSION MEMBERS
FROM: MARK SPENCER, AICP, PLANNER *Mark Spencer*
THROUGH: BARBARA MCBETH, AICP, DEPUTY DIRECTOR
COMMUNITY DEVELOPMENT
DATE: FEBRUARY 6, 2009
SUBJECT: 2009 CITY OF NOVI COMMERCIAL LAND USE FACTS

Introduction

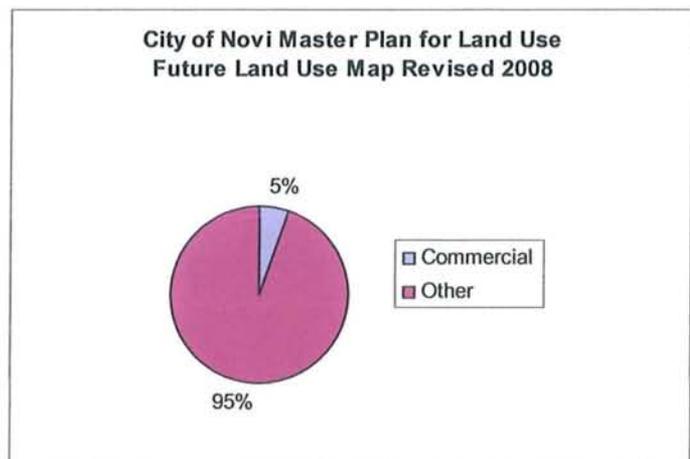
This memo is an updated recap of the various facts I uncovered regarding commercial land use and commercial centers in the City of Novi produced in January of 2005 and updated in January of 2007. This project was updated as part of the 2009 Master Plan Review. This project continues to provide the Planning Division and the Planning Commission with some basic information regarding the spatial and social aspects of retail businesses and commercial centers in the City. Understanding the retail sector is important part of land use planning for most communities. Retail centers generate tax revenue for the local community, provide jobs, serve the public by providing goods and services, and can bring recognition and place name identity to the host community by just being the "place people want to go." Studies have shown that people tend to shop where they can obtain the order of goods they seek, where they feel safe, where the shopping experience is pleasant, and where it is convenient. Special events can also draw people to a retail area. In order to create the environment for retail services of the scale and quality found in Novi, it takes a considerable amount of public and private investment to make it successful. Maintaining a place as a vibrant retail destination also takes continued public and private investment to keep it a place that shoppers want to frequent.

For the purposes of this memo, commercial centers are defined as multiple tenant building(s), or multiple building sites, including adjacent commercial lot(s), occupied by retail businesses, banks, restaurants, and similar uses that are perceived as one destination area. These centers typically, but not necessarily, share driveways, parking systems, and utilities. Excluded from this study were hotels, convention facilities, automobile sales lots, gasoline filling stations that are not located on an outlot for the central development, and stand alone businesses (such as Walgreen's, NAPA Auto Parts, etc.).

Spatial Aspects

Master Plan Land Use Information

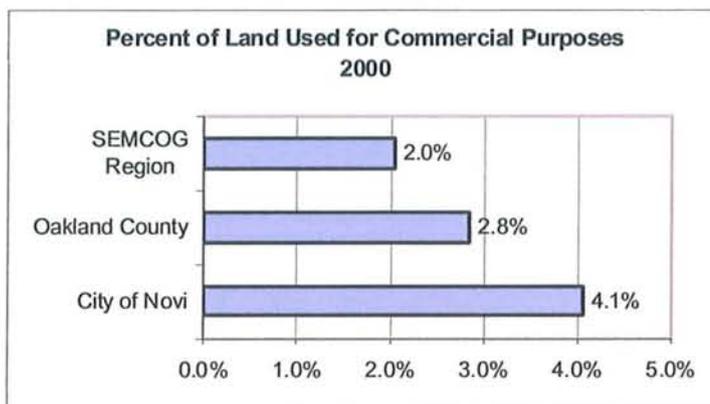
The City of Novi Master Plan Land Use's Future Land Use Map, updated in 2008, depicts a total of 1031 acres for commercial purposes. This represents 5% of the 20,081 acres of land within the City Limits. Land planned for commercial purposes includes land designated as Local Commercial, Community Commercial, Regional Commercial, Town Center



Commercial, Town Center Gateway and PD2 on the Plan's Future Land Use Map. The Existing Land Use Map, in the Master Plan, shows 1182 acres of the City occupied by commercial and office land uses. This is more acreage than is planned because it is based on assessing data and it includes offices.

SEMCOG Spatial Information

Commercial use of land has increasingly consumed more land in the City. The Southeast Council of Governments' (SEMCOG's) data states that commercial land use grew from 711 acres in 1990 to 814 acres in 2000 which represents an increase of 14.5%. It should be noted, that SEMCOG's data does not match the City's data, but it was included to show growth trends and to compare with County and regional data. As an example, areas zoned as OSC, Office Service Commercial, include commercial uses, but SEMCOG may consider it only for office uses. In recent years, the amount of land used in the City for commercial uses continues to grow. The mixed use Main Street project and the completion of Vitas (Sandstone) will add about another 34 acres of commercial center area in the City.



A higher percentage of land in the City of Novi is used for commercial purposes than is used for commercial purposes in Oakland County or in the SEMCOG region as a whole. SEMCOG data for 2000 indicates that 4.1% of the City's land was occupied by commercial uses. This compares to 2.8% for all of Oakland County and 2.0% of the whole SEMCOG region. This data indicates that commercial uses in Novi serve a market area larger than just the City.

City of Novi Commercial Center Data

Data from the City's Planning and Assessing Departments shows that commercial centers represent a large portion (85%) of the total land used for retail uses in the City. Commercial centers range in land area from 1.5 to 167 acres and in floor space from six thousand square feet to 1.9 million square feet. Currently commercial centers occupy 615 acres of the City with another 34 acres approved for future development. When the latter is completed, 650 acres or 3.2% of the gross area of the City will be used for commercial centers. The balance of the land planned for commercial uses on the Future Land Use Map (approximately 384 acres) includes stand-alone commercial buildings, automobile sales lots, gas stations, offices, residential, industrial uses and vacant land.

Commercial centers furnish 5.5 million square feet of floor space in the City. This will increase to 6.0 million square feet upon completion of the proposed projects coming to the City. This additional 446,000 sq. ft. of retail floor space includes 118,000 sq. ft. in the Main Street and the 268,000 sq. ft. balance of the retail floor space permitted in the Vistas (Sandstone) and Novi Promenade developments and other smaller projects.

2009 CITY OF NOVI COMMERCIAL LAND USE FACTS

February 6, 2009

Page 3 of 4

Types of Commercial Centers

Commercial centers can be categorized into four sub-groups based on their size and the market area they serve. Convenience or local business centers serve a neighborhood market area, minor and intermediate comparison or community business centers serve a community, and major comparison or regional business centers serve a region.

Types of Commercial Centers

Type Center	Trade Area	Minimum Support Population	Site Size (acres)	Floor Area (sq. ft.)	Typical Gross Principal Tenant
Convenience (Local Business)	2-3 neighborhoods	5,000 – 10,000	3 – 12	20,000 – 100,000	Supermarket
Minor Comparison (Community Business)	Small Community	20,000 – 60,000	12 - 20	100,000 – 200,000	Junior Department Store
Intermediate Comparison (Community Business)	Large Community	60,000 – 100,000	20 – 40	200,000 – 400,000	Intermediate Department Store
Major Comparison (Regional Business)	Region	250,000+	50+	400,000+	One Major or 2 – 3 Intermediate Department Stores

Source: Economic Study-Phase 2, June 1998, Brandon M. Rogers & Associates, P.C. in Novi 2020 Master Plan for Land Use, May 1999.

Regional business centers account for around half of the land area and two thirds of the floor area for all commercial centers in the City. This is another indication of the regional market area served by Novi commercial centers.

The retail facilities in Novi continue to expand and refresh their look to appeal to more customers. In 2007 and 2008, remodeling occurred at Twelve Mile Crossing at Fountain Walk, a major expansion of the Twelve Oaks Mall was completed and several outlot buildings were completed in the Novi Town Center. In addition, plans for a new electronics store were approved for two outlots at Twelve Oaks Mall.

The City is also experiencing an expansion of intermediate comparison commercial centers in the last two years. Plans were approved for a retail building in Novi Promenade and the "retail west" building was completed and a new bank is under construction at West Market Square.

The City recently saw the completion of several new convenience (local) retail establishments including a bank at Shoppes at the Trail, "Building C" at Gateway Village, a drug store at Vistas, "Building 3" at City Center Plaza and the "Vantage Pointe" small retail center. A fuel station with a convenience store is under construction at the Vistas and City Center Plaza began construction on a new building. Plans have been approved for Main Street to build a mixed use development that will include a local retail component.

Existing Land Area & Floor Area by Type of Retail Center

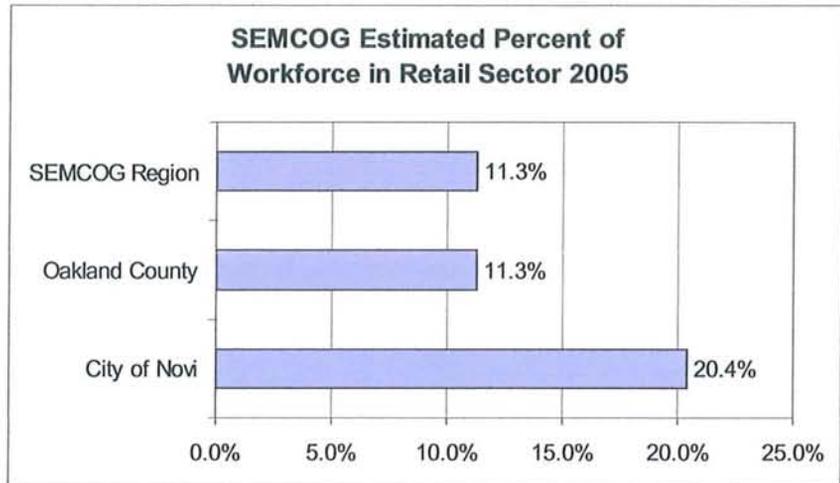
TYPE CENTERS	Total Acres	Percent	Total Floor Area (sq. ft.)	Percent
Convenience (Local Business)	101.3	16.5%	626,700	11.3%
Minor Comparison (Community Business)	38.2	6.2%	456,800	8.3%
Intermediate Comparison (Community Business)	129.0	21.0%	835,000	15.1%
Major Comparison (Regional Business)	346.2	56.3%	3,605,500	65.3%
TOTAL	614.7	100%	5,534,000	100%

The proposed Brooktown and Atto Gateway projects were removed from the active project list due to inactivity on these projects. The City has received and is reviewing applications for additional retail at Ten Mile and Wixom Roads and at Ten Mile and Novi Roads.

Social Aspects

SEMCOG Employment Data

A substantial portion of the people employed in the City of Novi work in the retail sector. For the latest year available, 2005, SEMCOG's Employment Forecast by Industrial Class states that of the 36,462 persons employed in the City, 7,427 were employed in the "retail trade" sector. This represents 20.4% of the



workforce. The second largest sector is "leisure and hospitality" at 13.5% of the work force and the third largest sector is "professional, scientific and technical services at 11.3%. This compares to Oakland County with 11.3% of its workers in the retail sector and the SEMCOG region also with 11.3%. This data also supports the premise that Novi retail businesses serve a market area larger than the City. SEMCOG Employment FORECAST is based on Bureau of Economic Analysis (BEA) county totals and includes estimates for persons not covered by unemployment insurance.

City of Novi Data

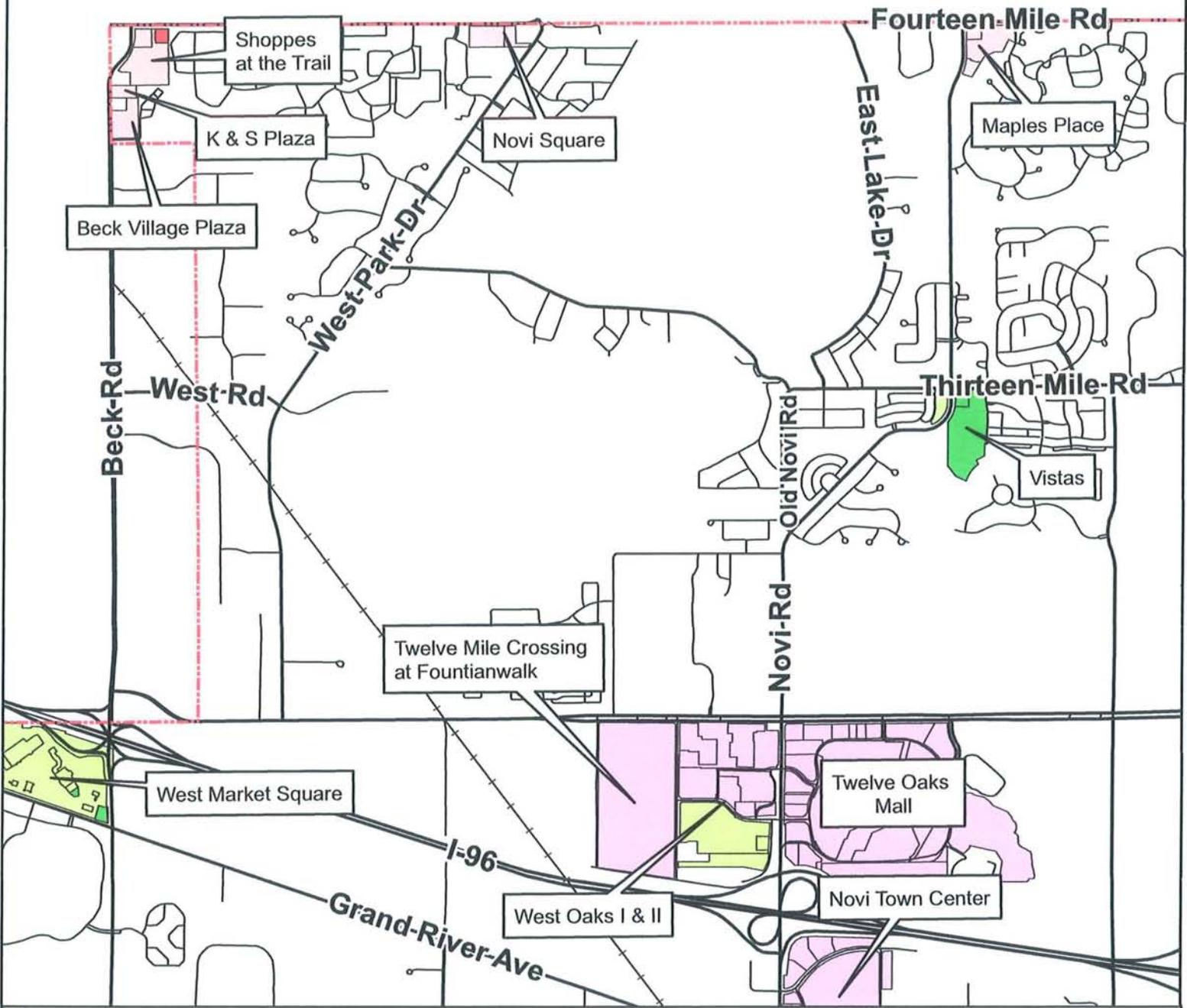
One indication of the importance of developed retail properties in the City is the percentage of real property taxable value for retail properties. The City of Novi Assessor placed a taxable value of \$328 million on the total of all developed retail properties. This is about 9% of the City's total taxable value. Multiplied by the 2008 millage of 10.5416, developed retail properties generated about \$3.5 million dollars in revenue for the City.

The 2008 Citizen Survey conducted in Novi includes positive responses toward commercial uses in the City. Ninety-five percent of residents surveyed said that shopping opportunities were good or excellent. They were also asked to rate the speed of retail growth over the last two years and 53% of respondents felt it was the right amount and 35% of the respondents felt it occurred too fast.

Summary

Commercial land uses occupy a large portion of the City's land, provide many jobs for the region, provide goods and services to the City of Novi and the region, and provide a substantial portion of the City's tax base. Commercial uses in the City serve a regional market area and have grown substantially over the last several years. Commercial centers are a major type of commercial land use in the City representing almost one-half of the commercial, shopping and services provided in the community.

City of Novi - North Area Shopping Centers January 2009



Shopping Center Classifications

<p> Local</p> <p> Minor Comparison</p>	<p> Intermediate Comparison</p> <p> Major Comparison</p>	<p> Local U.C. or Approved</p> <p> Minor U.C. or Approved</p>	<p> Intermediate U.C. or Approved</p> <p> Major U.C. or Approved</p>
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U.C. = Under Construction
Approved = Approved Site Plan



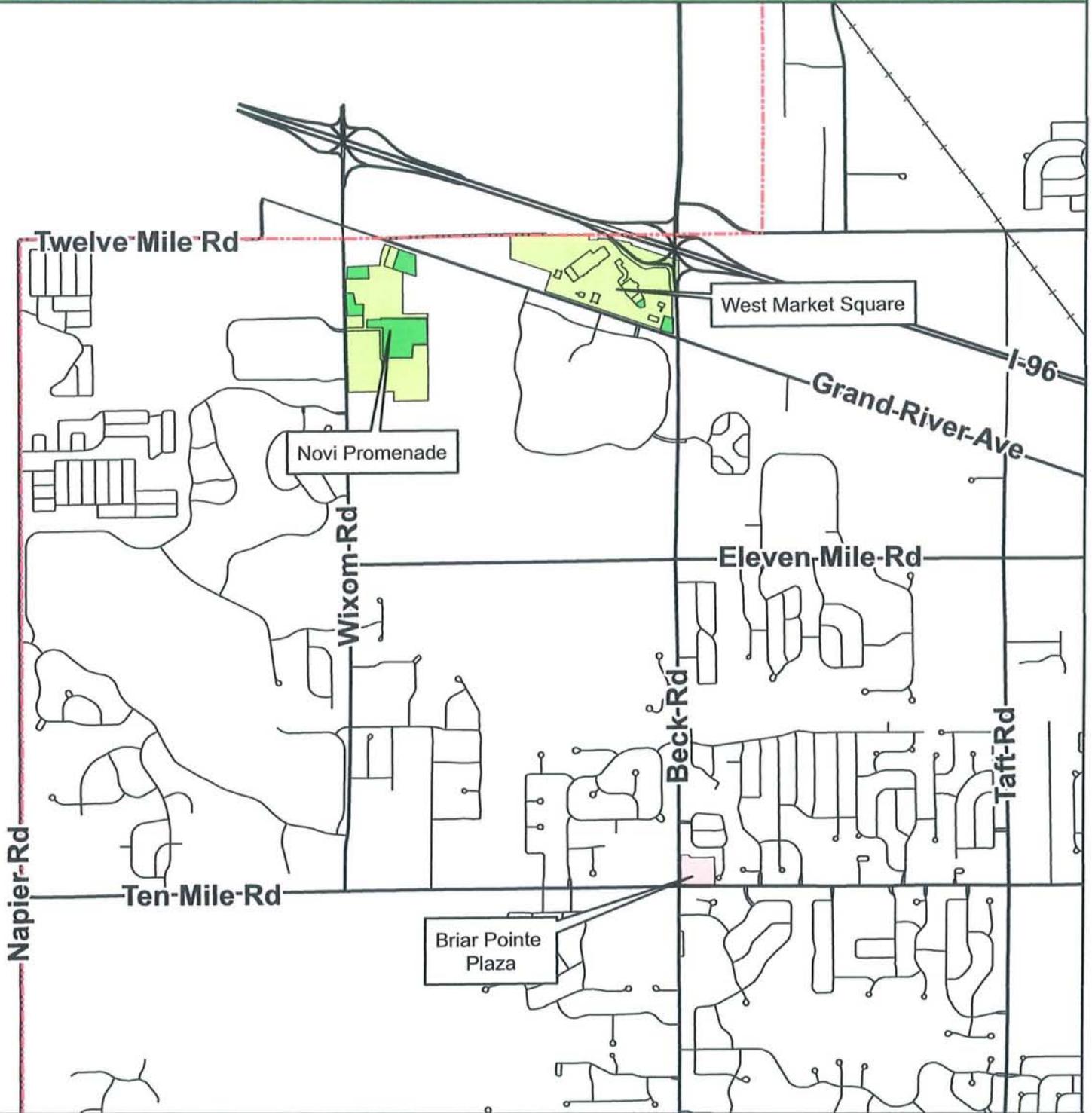
CITY OF NOVI
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MARK SPENCER, AICP, PLANNER
CREATED: 2/3/09



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Map information depicted is not intended to replace or substitute for any official or primary source. This map was intended to meet National Map Accuracy Standards and use the most recent, accurate sources available to the people of the City of Novi. Boundary measurements and area calculations are approximate and should not be construed as survey measurements performed by a licensed Michigan Surveyor as defined in Michigan Public Act 132 of 1970 as amended. Please contact the City GIS Manager to confirm source and accuracy information related to this map.

City of Novi - West Area Shopping Centers January 2009



Shopping Center Classifications

 Local	 Intermediate Comparison	 Local U.C. or Approved	 Intermediate U.C. or Approved
 Minor Comparison	 Major Comparison	 Minor U.C. or Approved	 Major U.C. or Approved

U.C. = Under Construction
Approved = Approved Site Plan

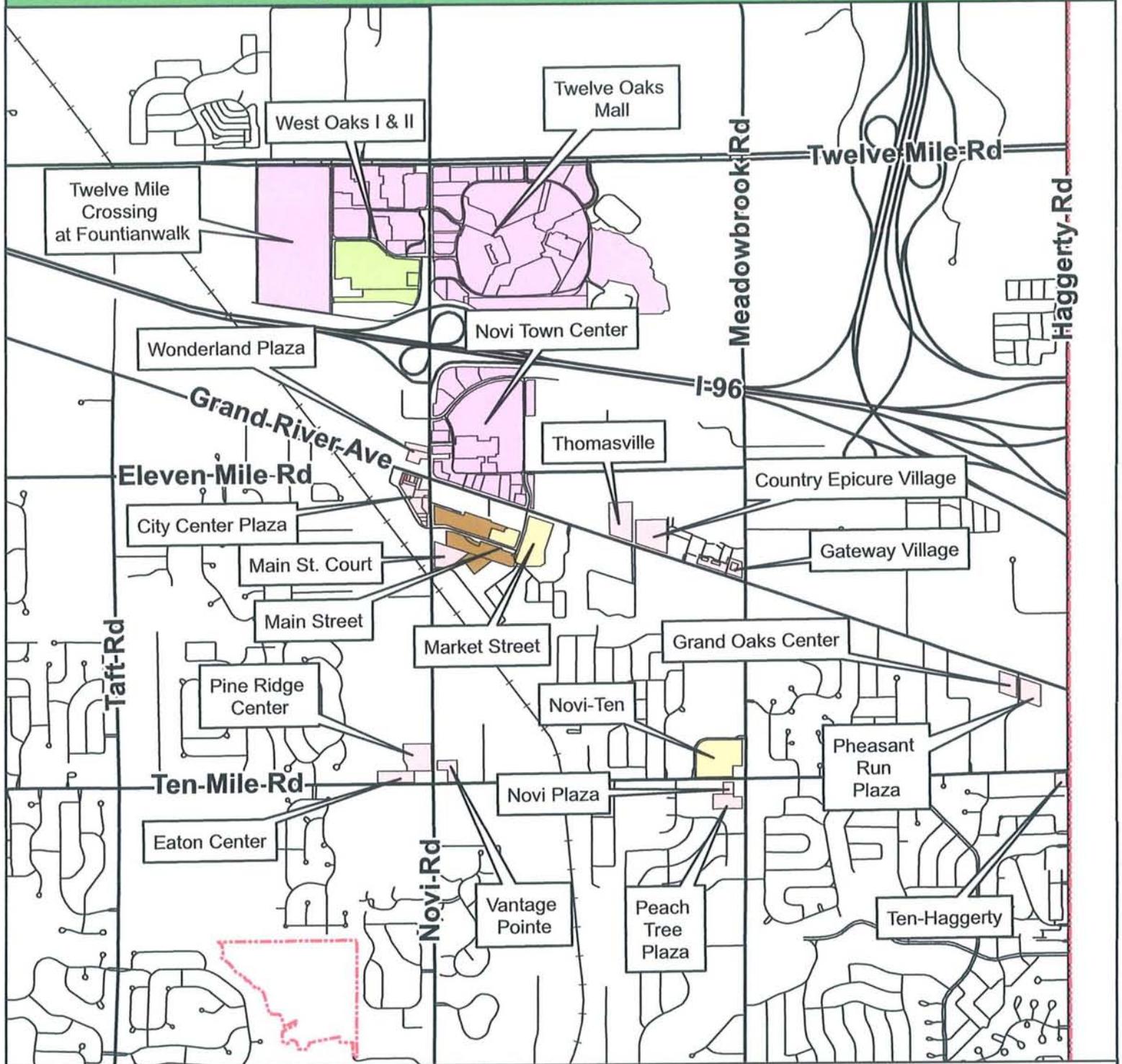


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City of Novi - Central Area Shopping Centers January 2009



Shopping Center Classifications

 Local	 Intermediate Comparison	 Local U.C. or Approved	 Intermediate U.C. or Approved
 Minor Comparison	 Major Comparison	 Minor U.C. or Approved	 Major U.C. or Approved

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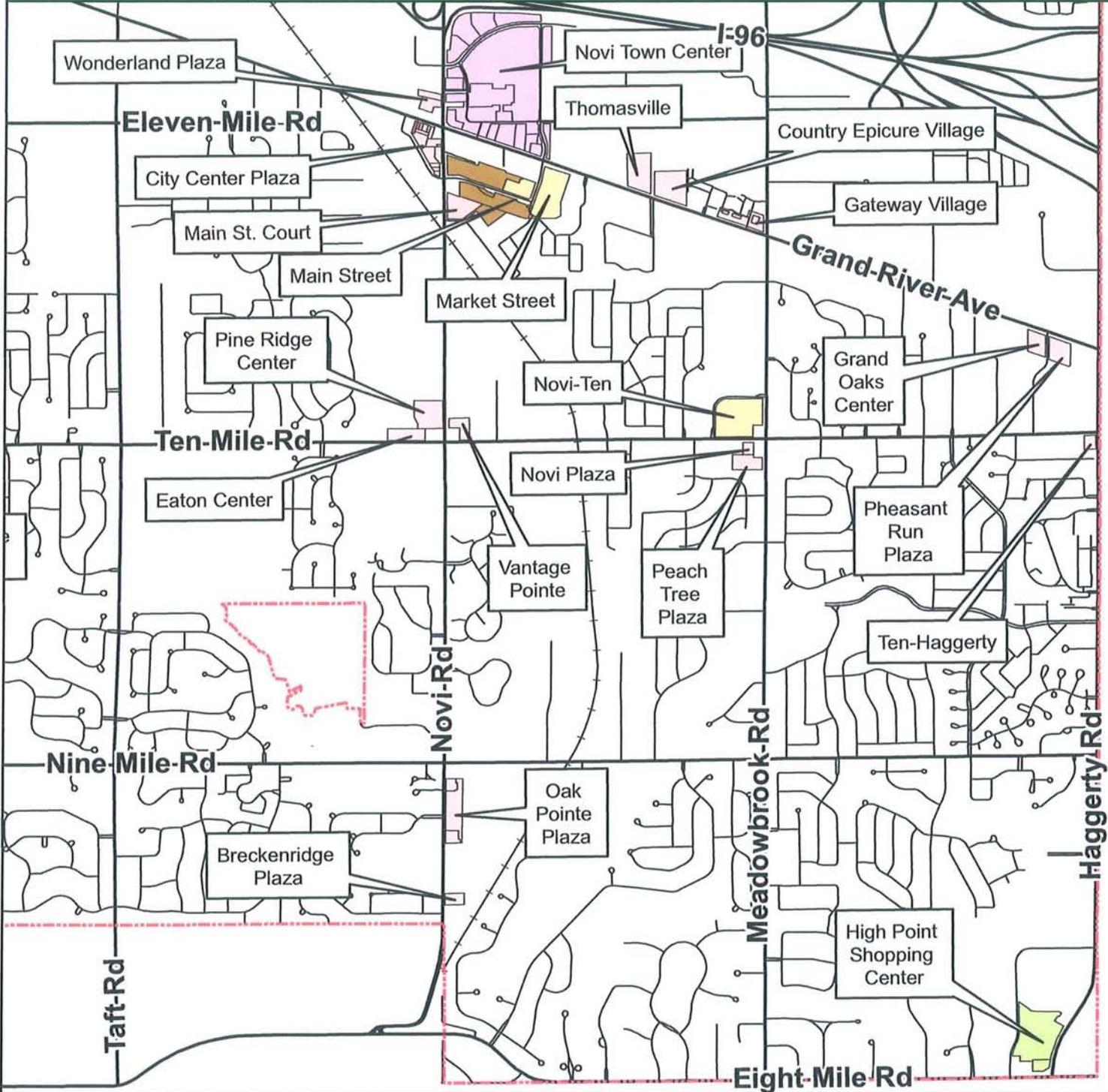


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Miles

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City of Novi - South Area Shopping Centers January 2009



Shopping Center Classifications

 Local	 Intermediate Comparison	 Local U.C. or Approved	 Intermediate U.C. or Approved
 Minor Comparison	 Major Comparison	 Minor U.C. or Approved	 Major U.C. or Approved

U.C. = Under Construction
Approved = Approved Site Plan



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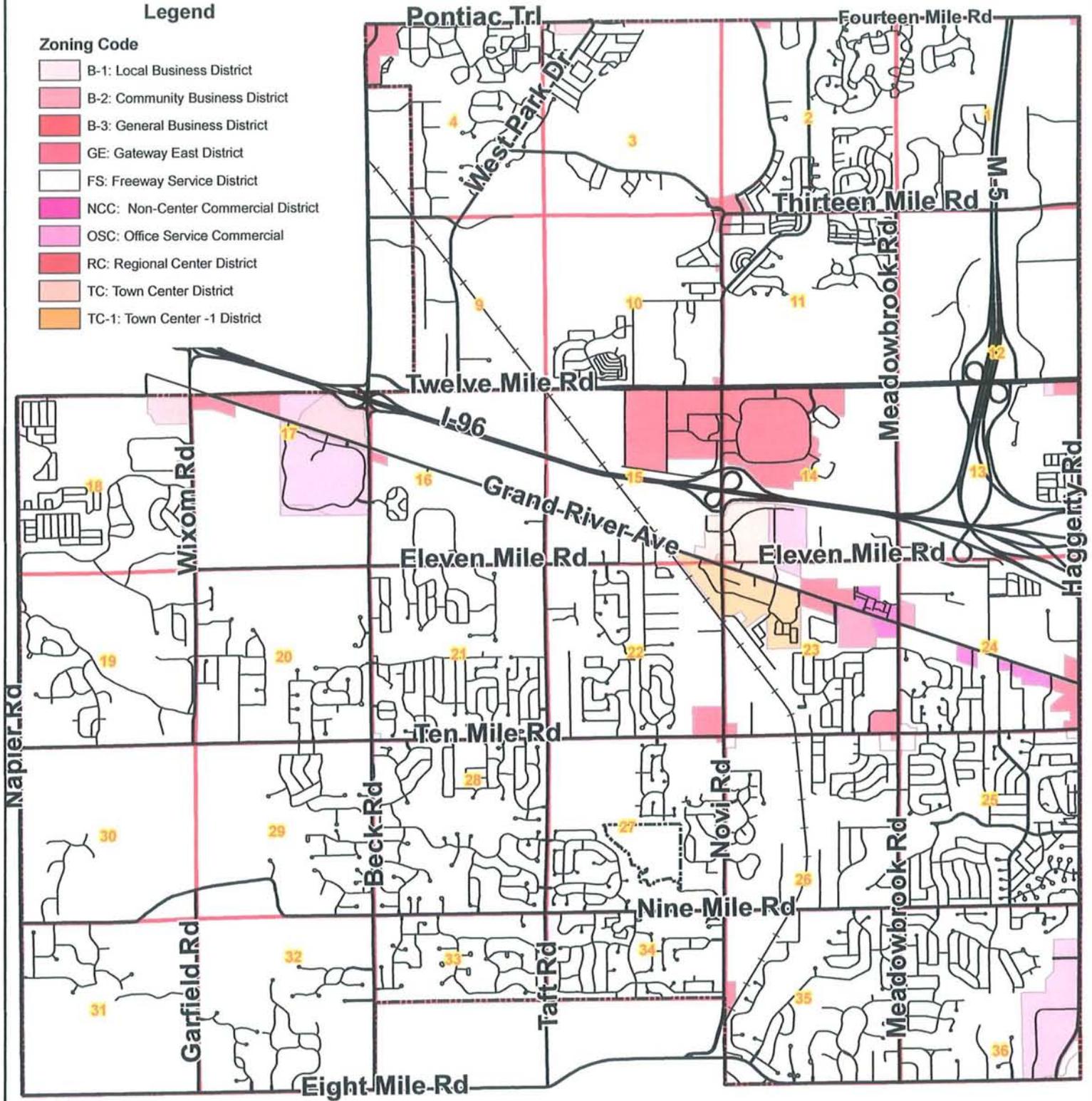
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City of Novi Zoning Districts Permitting Retail January 2009

Legend

Zoning Code

-  B-1: Local Business District
-  B-2: Community Business District
-  B-3: General Business District
-  GE: Gateway East District
-  FS: Freeway Service District
-  NCC: Non-Center Commercial District
-  OSC: Office Service Commercial
-  RC: Regional Center District
-  TC: Town Center District
-  TC-1: Town Center -1 District



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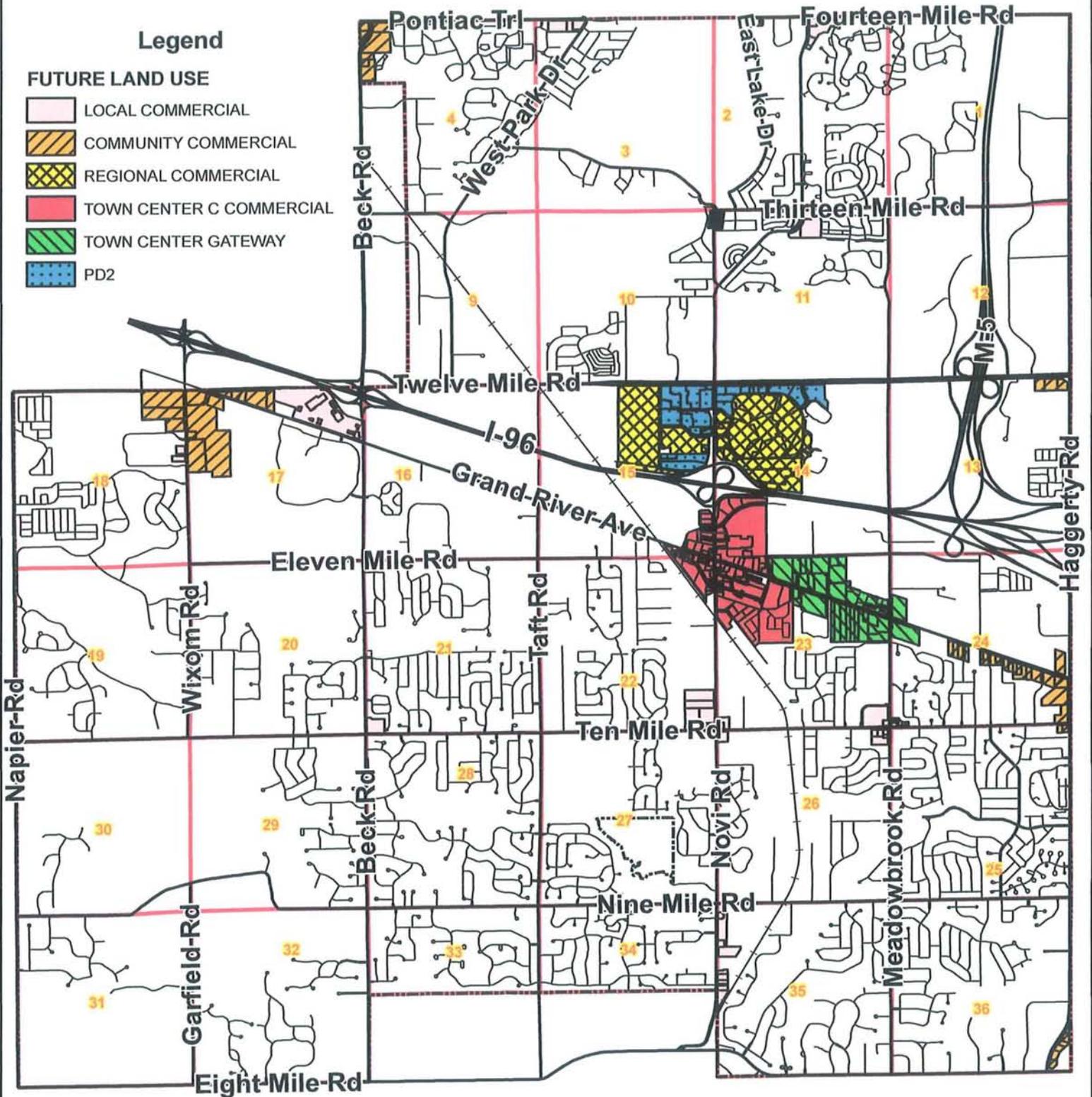
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City of Novi 2008 Master Plan for Land Use Commercial Areas Future Land Use Map

Legend

FUTURE LAND USE

-  LOCAL COMMERCIAL
-  COMMUNITY COMMERCIAL
-  REGIONAL COMMERCIAL
-  TOWN CENTER C COMMERCIAL
-  TOWN CENTER GATEWAY
-  PD2



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RETAIL/SHOPPING CENTER RECAP CITY OF NOVI

02/06/2009

Plan Review Center, Mark Spencer, AICP

Development totals include outlots

Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
50-22-02-200-041	CVS Pharmacy	1.54	1999	10,878	10,878				CVS Pharmacy #8244
50-22-02-200-046	Maples Place	3.17	1999	11,650	11,650				Maple Place Investment, LLC
	Maples Place		1999	21,682	21,682				Maple Place Investment, LLC
50-22-02-200-045	Flagstar Bank	1.14	2003	3,745	3,745				Flagstar Bank
50-22-02-200-047	Maples Place	3.46	vacant						Maple Place Investment, LLC
	MAPLES PLACE	9.31		47,955	47,955		SE Corner Novi & 14 Mile	Convenience (Local Business)	
50-22-03-101-010	Novi Square	4.79	1981	27,090	27,090				Kayne Properties, LLC
	Novi Square		1981	12,535	12,535				Kayne Properties, LLC
50-22-03-101-011	LaSalle Bank shared parking lot	1.85	unknown	2,400	2,400				LaSalle Bank Midwest
	NOVI SQUARE	6.64		39,625	39,625		South side Pontiac Trail west of West Park	Convenience (Local Business)	
50-22-04-100-037	CVS	1.84	2005	12,721	12,721				Barrington West Real Estate L
50-22-04-100-038	Shoppes at the Trail	9.72	2004	74,440	74,440				Novi Retail, LLC
50-22-04-100-039	Shoppes at the Trail outlot	1.23	vacant						Novi Retail, LLC
50-22-04-100-040	Shoppes at the Trail (Comerica Bank)	1.08	UC			3,310			Comerica Bank
	SHOPPES at the TRAIL	13.87		87,161	87,161	3,310	SE corner Beck & Pontiac Trail	Convenience (Local Business)	
50-22-04-100-012	K & S Plaza	2	1978	16,260	16,260				K & S Investment Group, LLC
	K & S PLAZA	2.00		16,260	16,260		East side Beck 1,000 feet south Pontiac Trail	Convenience (Local Business)	
50-22-04-100-032	Beck Village Plaza	5.58	1990	35,040	35,040				H & S Global Properties, Inc.
	BECK VILLAGE PLAZA	5.58		35,040	35,040		East side Beck 1,500 ft. south of Pontiac Trail	Convenience (Local Business)	



RETAIL/SHOPPING CENTER RECAP CITY OF NOVI

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50-22-11-200-012	Vistas (Sandstone)	16	concept			154,860			Sandstone Assoc. LP 1
50-22-11-126-004	Rite Aide	2.2		11,180	11,180				RAC Novi, LLC
50-22-11-200-006	Sunshine Makt. Fuel Station	1.15	u.c.			3,960		bal. consent judgement	Sunshine Express Novi Proper
	VISTAS (Sandstone)	19.35		11,180	11,180	158,820	SE corner Novi & 13 Mile	Minor Comparison (Community Business)	
50-22-14-100-034	Hagopian Rugs	2.7	1998	29,884	9,961				Twelve Mile Hagopian LLC
50-22-14-100-038	Twelve Oaks Mall	4.23	vacant						Waltonwood at 12 Oaks LLC
50-22-14-100-039	Twelve Oaks Mall	4.57	vacant						Singh IV LP
50-22-14-200-040	Twelve Oaks Mall	25.53	detention						Twelve Oaks Mall, LLC
50-22-14-100-042	Sears	17.84	1977	241,725	132,587				SRC Facilities Statutory Trust
50-22-14-100-043	Lord & Taylor	8.63	1978	123000	61500				LT Property Co. LLC
50-22-14-100-047	Comerica Bank	1.6	1980	4264	4264	-4264	demo for Best Buy		Comerica Bank
50-22-14-100-048	Marshall Field	16.59	978/2007	300,000	110,000		includes addition	addition	May Co. Department Stores
50-22-14-100-049	Red Lobster	2.82	1983	8,597	8,597				GMRI, Inc.
50-22-14-100-050	Denny's	1.4	1979	5,667	5,667				Denny's Inc.
50-22-14-100-051	La-Z-Boy Furniture	2.18	1978	17,616	17,616				Novi Acquisition LLC
50-22-14-100-052	J.C. Penny	11.03	1987	148,812	74,406				J.C. Penny Corp., Inc.
50-22-14-100-057	McDonald's	1.52	1978	4,579	4,579				McDonalds Corp.
50-22-14-100-058	Twelve Oaks Mall	39.15	1976	486,997	243,499				Twelve Oaks Mall, LLC
50-22-14-100-058	Twelve Oaks Mall		1976	218,000	109,000				Twelve Oaks Mall, LLC
50-22-14-100-058	Twelve Oaks Mall		2007	97,000	50,000		new addition		Twelve Oaks Mall, LLC
50-22-14-100-058	Twelve Oaks Mall		2007	169,000	85,000		Nordstrom		Twelve Oaks Mall, LLC
50-22-14-100-061	Newton Furniture Store	1.71	1983	20,000	20,000	-20,000	demo for Best Buy		Wolf Investment, LLC
50-22-14-100-062	Twelve Oaks Mall	14.27	vacant						Twelve Oaks Mall LLC
50-22-14-100-063	Gormans Furniture	1.78	1988	50,028	25,014				Oaks Corner, Inc.
50-22-14-100-065	Cellular One	1.48	1994	7,120	7,120				Cellular One
50-22-14-100-066	Ethan Allen	1.43	1999	19,362	9,681				Ethan Allen
50-22-14-100-067	Twelve Oaks Mall	6.57	vacant						Twelve Oaks Mall LLC
50-22-14-100-068	Twelve Oaks Mall	0.68	vacant						Twelve Oaks Mall LLC
	Best Buy					30,100	Best Buy		



RETAIL/SHOPPING CENTER RECAP CITY OF NOVI

02/06/2009

Plan Review Center, Mark Spencer, AICP
Development totals include outlots

Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
	TWELVE OAKS MALL	167.71		1,951,651	978,491	5,836	SW corner Novi & Twelve Mile -	Major Comparison (Regional Business)	
50-22-14-351-055	Novi Town Center	39.42	1987	265,319	265,319				Novi Town Center Investors
50-22-14-351-055	Novi Town Center		1987	24,934	24,934				Novi Town Center Investors
50-22-14-351-055	Novi Town Center		1987	39,586	39,586				Novi Town Center Investors
50-22-14-351-055	Novi Town Center		1987	39,586	39,586				Novi Town Center Investors
50-22-14-351-055	Novi Town Center		2008	6,471	6,471				Novi Town Center Investors
50-22-14-351-048	Novi Town Center	0.54	2008	6,013	6,013				Novi Town Center Investors
50-22-14-351-048	Novi Town Center		2008	8,100	8,100				Novi Town Center Investors
50-22-14-351-056	Novi Town Center	7.07	1987	77,343	77,343		Mervyn's		Novi Town Center Investors
50-22-23-126-012	Discount Tire	0.99	1990	7,005	7,005				Halle-Von Voigtlander
50-22-23-105-001	Steve & Rocky's	1.7	1994	7,021	7,021				Antoniou Realty, LLC
50-22-23-101-008	Bank One	2.26	1979	6,118	6,118				Bank One
50-22-23-101-017	Novi Town Center	0.88	2008	5,634	5,634				Novi Town Center Investors
50-22-14-351-057	Kim's Garden	1.09	1978	5,984	5,984				Wong Family trust
50-22-14-352-003	Boston Market	1.15	1995	3,218	3,218				Commercial Net Lease Realty
50-22-14-352-002	Fifth Third Bank	1.41	1981	4,378	4,378				Fifth Third Corp
50-22-14-301-003	Grandy's American Grill	2.27	1993	7,301	7,301				Alonco Novi, LLC
50-22-14-301-004	Olive Garden	3.36	1991	9,361	9,361				General Mills Restaurants
50-22-14-301-005	Red Robin	2.81	1992	6,627	6,627				Amsara Bros. Real Estate
50-22-14-301-006	T.G.I. Friday's	2.8	1994	7,504	7,504				GE Capital Finance
	NOVI TOWN CENTER	67.75		537,503	537,503		NE corner Grand River & Novi	Major Comparison (Regional Business)	
50-22-15-200-059	West Oaks II	14.91	1986	4,071	4,071				Ramco/West Oaks II Spring, L
50-22-15-200-059	West Oaks II		1986	58,942	58,942				Ramco/West Oaks II Spring, L
50-22-15-200-059	West Oaks II		1986	23,962	23,962				Ramco/West Oaks II Spring, L
50-22-15-200-059	West Oaks II		1986	6,833	6,833				Ramco/West Oaks II Spring, L
50-22-15-200-059	West Oaks II		1986	8,086	8,086				Ramco/West Oaks II Spring, L
50-22-15-200-059	West Oaks II		1999	46,486	23,243				Ramco/West Oaks II Spring, L
50-22-15-200-059	West Oaks II		unknown	18,013	18,013				Ramco/West Oaks II Spring, L
50-22-15-200-097	vacant	0.44							Archie Vanerslander
50-22-15-200-099	vacant	0.96							Archie Vanerslander



RETAIL/SHOPPING CENTER RECAP CITY OF NOVI

02/06/2009

Plan Review Center, Mark Spencer, AICP

Development totals include outlots

Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
50-22-15-200-070	Standard Federal	1.66	1982	4,950	4,950				LaSalle Bank, Midwest
50-22-15-200-103	Art Van Furniture	6.7	1980	102,520	102,520				Archie Vanerslander
50-22-15-200-061	Value City/Bed Bath	6.76	1986	93,171	93,171				Jubilee Limited Partnership
50-22-15-200-106	Toys R Us	4.21	1986	47,920	47,920				Tru Properties, Inc.
50-22-15-200-105	Petco	2.03	1986	25,720	25,720				Pacific PetC-NovI LLC
50-22-15-200-058	Kohl's	5.81	1987	69,283	69,283				Kohls Department Store #9
	WEST OAKS II	43.48		509,957	486,714		SW cor 12 Mile & Novi except Midas	Major Comparison (Regional Business)	
50-22-15-200-101	West Oaks I	20.12	1980	34,345	34,345				Ramco Westoaks I LLC
50-22-15-200-101	West Oaks I		1997	49,859	49,859				Ramco Westoaks I LLC
50-22-15-200-101	West Oaks I		1980	58,581	58,581				Ramco Westoaks I LLC
50-22-15-200-101	West Oaks I		1980	92,435	92,435				Ramco Westoaks I LLC
50-22-15-200-102	Carrabbas Restaurant	0.99	unknown	6,426	6,426				Ramco Westoaks I LLC
50-22-15-200-093	27155 Sheraton	5.9	1979	25,369	25,369				Pico Investment Ltd.
	WEST OAKS I	27.01		267,015	267,015		W. of Novi, N. of 96, E. of Donelson & S. of West Oaks Dr. (South)	Intermediate Comparison (Community Business)	
50-22-15-200-100	Fountain Walk Build. E	67.21	2002	58,780	58,780				HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. F		2002	36,050	36,050				HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. G		2002	35,418	35,418				HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. H		2001	88,422	44,211				HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. B		2001	152,159	76,553				HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. L		2001	83,492	41,746				HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. CE		2001	35,253	35,253				HHT Devco, LLC
50-22-15-200-100	Fount. Walk Build. CW		2001	43,848	43,848				HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. D		2002, '07				building removed		HHT Devco, LLC
50-22-15-200-100	Fountain Walk Build. A		2002	72,986	72,986				HHT Devco, LLC
50-22-15-200-100	outlot		proposed			10,000		proposed	HHT Devco, LLC
50-22-15-200-100	outlot		proposed			7,200		proposed	HHT Devco, LLC



RETAIL/SHOPPING CENTER RECAP CITY OF NOVI

02/06/2009

Plan Review Center, Mark Spencer, AICP
Development totals include outlots

Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
	TWELVE MILE CROSSING at FOUNTAIN WALK	67.21		606,408	444,845	17,200	S. of 12 Mile, E. of Donelson, N. of Fountain Walk & E. of Caberet	Major Comparison (Regional Business)	
50-22-15-476-033	Wonderland/Roman Plaza	1.39	1972	15,025	15,025				Fortuna Corporation
50-22-15-476-023	Wonderland Music	0.91	1992	9,417	9,417				269159 Novi, LLC
	WONDERLAND PLAZA	2.30		24,442	24,442		W. side of Novi 250 ft. N. of Grand River	Convenience (Local Business)	
50-22-17-226-004	Home Depot	3.31	2000	124,018	124,018				Advent Partners LP
50-22-17-226-005	WMS north outlot	5.95	2000	35,815	35,815				Jonna-Prov, LLC
50-22-17-226-006	Kroger	9.38	2000	56,970	56,970				Kroger Co. of Michigan
50-22-17-226-007	WMS east outlot	2.24	2000	11,680	11,680				Jonna-Prov, LLC
50-22-17-226-019	Comerica Bank	4.53	u.c.			3,300			Comerica Bank
50-22-17-226-010	Applebees	2.64	2001	5,514	5,514				Advent Partners LP
50-22-17-226-011	Standard Federal	1.24	2001	5,221	5,221				Advent Partners LP
50-22-17-226-012	Outback Steak House	1.98	2002	6,260	6,260				Advent Partners LP
50-22-17-226-013	TCF Bank	1.38	2004	5,920	5,920				TFC National Bank
50-22-17-226-0??	WMS West outlot	4.8	2008	24,938	24,938				Advent Partners LP
50-22-17-226-016	WMS Retail East & Staples	3.66	2004	20,378	20,378	9,150			Jonna-Prov, LLC
	WEST MARKET SQUARE	41.11		296,714	296,714	12,450	NW corner Grand River & Beck	Intermediate Comparison (Community Business)	
50-22-17-101-030	Sam's Club & Gas Station	13.98	2005	138,935	138,935				Sam's Real Estate Bus.
50-22-17-101-032	Novi Promenade balance	24.77		vacant	approx. ma	97,462	balance permitted in development		Novi Promenade Association
50-22-17-101-026	Novi Promenade north outlots	2.56		vacant					Novi Promenade Association



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Development totals include outlots

Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
50-22-17-101-029		1.57	permitted	vacant		13,300			Novi Promenade Association
50-22-17-101-031		1.61		vacant					Novi Promenade Association
50-22-17-101-025	Citizens Bank	1.85	2005	3,088	3,088				Citizens Bank
50-22-17-101-022	Target	13.23	2002	125,400	125,400				Target Corporation
50-22-17-101-024	Huntington Bank	1.34	2005	3,889	3,889				Huntington National Bank
	NOVI PROMENADE	60.91		271,312	271,312	110,762	E. side of Wixom 500 ft. S. Grand River	Intermediate Comparison (Community Business)	
50-22-21-300-025	Briar Pointe Plaza No. 1	6.42	1994	10,961	10,961				Briarwood of Novi Partnership
50-22-21-300-025	Briar Pointe Plaza No. 2		1994	19,087	19,087				Briarwood of Novi Partnership
	BRIAR POINTE PLAZA	6.42		30,048	30,048		NE cor Beck & Ten Mile	Convenience (Local Business)	
50-22-22-227-028	City Center Plaza	4.54	1997	26,375	26,375				City Center Plaza, Ltd.
50-22-22-227-028	City Center Plaza 2		2003	5,990	5,990				City Center Plaza, Ltd.
50-22-22-227-026	City Center Plaza 3	0.4	uc			6,096			City Center Plaza, Ltd.
50-22-22-227-028	City Center Plaza 4		uc			3,640			City Center Plaza, Ltd.
	CITY CENTER PLAZA	4.94		32,365	32,365	3,640	W. side Novi 300 ft. S. Grand River	Convenience (Local Business)	
50-22-22-400-017	Eaton Center	3.26	1987	7,504	7,504				JR Enterprises Novi, LLC
50-22-22-400-017	Eaton Center		1987	3,685	3,685				JR Enterprises Novi, LLC
50-22-22-400-017	Eaton Center		1987	4,814	4,814				JR Enterprises Novi, LLC
	EATON CENTER	3.26		16,003	16,003		N. side Ten Mile 400 ft. west of Novi	Convenience (Local Business)	
50-22-22-400-026	Pine Ridge Shopping Center	5.22	1987	37,933	37,933				Pine Ridge Associates, LP
	PINE RIDGE SHOPPING CENTER	5.22		37,933	37,933		W. side Novi 300 ft. N. of Ten Mile	Convenience (Local Business)	



RETAIL/SHOPPING CENTER RECAP CITY OF NOVI

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Plan Review Center, Mark Spencer, AICP

Development totals include outlots

Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
50-22-23-351-053	Vantage Pointe	1.92	2008	10,050	10,050				JBD 5, LLC
	VANTAGE POINTE	1.92		10,050	10,050	10,050	behind NE cor Novi & Ten Mile	Convenience (Local Business)	
50-22-23-176-025	North Side of Main Street bldg. 200-300 Retail	2.73	1998	79,806	79,806		NW cor Main & Market	Office over retail	Main Street Partnership, LLC
50-22-23-151-035 & 50-22--23-176-026	North & south side of Main St.	17.8	proposed			118,000	North & south side of Main St.	Office & residential over retail	Triangle Main Street, LLC
	MAIN STREET	20.53		79,806	79,806	118,000	Both sides of Main St.	Minor Comparison (Community Business)	
50-22-23-151-003	Main St. Court	3.67	1998	23,731	23,731		SW corner Main & Novi	Convenience (Local Business)	Grand Grace Holding
	MAIN ST. COURT	3.67		23,731	23,731				
50-22-23-176-011	Market Street East #1	8.15	1994	66,530	59,703				Luna Properties Novi, LLC
50-22-23-176-012	Market Street East #2		1994	3,456	3,456				Luna Properties Novi, LLC
50-22-23-176-013	Market Street East #3 Vics		1994	63,329	63,329				Luna Properties Novi, LLC
	MARKET STREET	8.15		133,315	126,488		SE cor. Grand River & Market	Minor Comparison (Community Business)	
50-22-23-226-023	Country Epicure Village	5.86	1970	8,026	8,026				Liro & Beverly Angelosante
50-22-23-226-023	Country Epicure Village		1987	12,238	12,238				Liro & Beverly Angelosante
	COUNTRY EPICURE VILLAGE	5.86		20,264	20,264		N. side Grand River 3/8 mile W. of Meadowbrook	Convenience (Local Business)	



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Plan Review Center, Mark Spencer, AICP
Development totals include outlots

Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
50-22-23-226-038	McLaughlin's Thomasville	5.94	1987	30,917	30,917				McLaughlin Family Propertyies
	MCLAUGHLIN'S THOMASVILLE	5.94		30,917	30,917		N. side Grand River 0.43 mile W. of Meadowbrook	Convenience (Local Business)	
50-22-23-228-001	Gateway Village A	3.5		4,974	4,974				Shoppes of GV, LLC
50-22-23-228-002	Gateway Village B			7,111	7,111				Shoppes of GV, LLC
50-22-23-228-003	Gateway Village C			13,761	13,761				Shoppes of GV, LLC
	GATEWAY VILLAGE	3.50		25,846	25,846		NW corner Grand River & Meadowbrook	Convenience (Local Business)	
50-22-23-426-017	Novi-Ten Shop. Cent.	11.02	1976	59,550	59,550				Novi Meadowbrook Shopping
50-22-23-426-017	Novi-Ten Shop. Cent.		1976	480	480				Novi Meadowbrook Shopping
50-22-23-426-017	Novi-Ten Shop. Cent.		1976	41,600	41,600				Novi Meadowbrook Shopping
	NOVI-TEN SHOPPING CENTER	11.02		101,630	101,630		NW cor Ten Mile & Meadowbrook	Minor Comparison (Community Business)	
50-22-24-476-025	Pheasant Run Plaza	3.03	1986	12,974	12,974				Pheasant Run Plaza, Inc.
50-22-24-476-025	Pheasant Run Plaza		1986	10,224	10,224				Pheasant Run Plaza, Inc.
50-22-24-476-025	Pheasant Run Plaza		1989	810	810				Pheasant Run Plaza, Inc.
50-22-24-476-025	Pheasant Run Plaza		1986	317	317				Pheasant Run Plaza, Inc.
	PHEASANT RUN PLAZA	3.03		24,325	24,325		SE cor Grand River & Karim	Convenience (Local Business)	
50-22-24-476-027	Grand Oaks Center Building 1	2.42	2000	11,825	11,825				Grand Oak Center, LLC
50-22-24-476-027	Grand Oaks Center Building 2		2000	9,817	9,817				Grand Oak Center, LLC
	GRAND OAKS CENTER	2.42		21,642	21,642			Convenience (Local Business)	



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Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
50-22-25-226-011	Ten & Haggerty	1.32	1981	7,261	7,261				William Licari
	TEN & HAGGERTY	2.42		7,261	7,261			Convenience (Local Business)	
50-22-26-228-026	Novi Plaza East Side	0.81	1972	9,100	9,100				Lake State Investment Co.
50-22-26-228-027	Novi Plaza East Side	0.8	1971	9,100	9,100				Lake State Investment Co.
	NOVI PLAZA- EAST SIDE	1.61		18,200	18,200		S. side Ten Mile 250 ft. W. Meadowbrook	Convenience (Local Business)	
50-22-26-228-028	Peachtree Shopping Center	2.68	1986	24,949	24,949				Polo Run
	PEACHTREE SHOPPING CENTER	2.68		24,949	24,949		W. side Meadowbrook 400 ft. S. Ten Mile	Convenience (Local Business)	
50-22-35-101-010	Breckenridge Plaza	1.53	1987	11,301	11,301				Breckenridge Plaza, LLC
	BRECKENRIDGE PLAZA	1.53		11,301	11,301		W. side Novi 0.4 miles N. of Eight Mile	Convenience (Local Business)	
50-22-35-101-031	Oak Pointe Plaza Bld 1	0.97	1993	6,525	6,525				Oakpointe Plaza Ass., LLC
50-22-35-101-032	Oak Pointe Plaza Bld 2	5.37	1993	16,915	16,915				CVS #8140-01
50-22-35-101-032	Oak Pointe Plaza Bld 3		1993	20,463	20,463				CVS #8140-01
50-22-35-101-033	Oak Pointe Plaza Bld 4	1.2	1993	7,500	7,500				Oakpointe Plaza Ass., LLC
	OAKPOINTE PLAZA	7.54		51,403	51,403		E. side Novi 300 ft. S. Nine Mile	Convenience (Local Business)	
50-22-36-477-034	High Pointe Shop. Ctr.	12.31	1997	117,081	117,081				High Pointe Shopping Center
50-22-36-477-035	Brinker Restaurant	0.6	1997	8,130	8,130				Binker Michigan, Inc.
50-22-36-477-007	Chili's	1.2	1988	5,682	5,682				Binker Michigan, Inc.
	HIGH POINT SHOP. CENTER	14.11		130,893	130,893		NW cor Eight Mile & Haggerty	Minor Comparison (Community Business)	



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Parcel Number	Building/ DEVELOPMENT Name	Area acres	Year Built (permit issued)	Floor Area sq.ft.	Ground Floor Area sq.ft.	Under Construct. & Proposed Sq. ft.	Location	Type of Center (notes)	Owner Name
TOTALS		650.0		5,534,105		430,018			
Proposed includes potential building on outlots									
GRAND TOTAL after Completion		650.0		5,964,123					

MEMORANDUM



TO: MASTER PLAN AND ZONING COMMITTEE
FROM: MARK SPENCER, AICP, PLANNER *Mark Spencer*
SUBJECT: 2009 MASTER PLAN REVIEW
RETAIL SPACE DEMAND FORECAST
DATE: MARCH 3, 2009

Introduction

Providing space within a community for future retail uses is an important part of all municipal future land use plans. Many factors need to be reviewed to produce a plan that supplies enough land for reasonable retail growth while at the same time not creating an over supply that can negatively impact the community. Without an adequate supply of land for retail space, some of the retail services that the public wants may not be provided and, if not provided, the public will need to travel outside of the local community to get these services. Conversely, the supply of retail land is too large, a disinvestment in current retail centers can occur. Keeping the supply in balance can help stimulate infill, reduce vacancy rates, and reduce sprawl.

In order to know how much land should be designated for commercial activities it is important to assess the size, strength and character of each sector of the commercial market. An assessment of the market can be used to identify potential economic opportunities and help forecast future commercial growth. It should be kept in mind that providing actual retail space is a private sector function. Municipal government's role is to provide areas of the municipality for a mix of economic uses and to make sure those uses are compatible with the built and natural environment.

As part of the City's 2007 Master Plan Review, The Chesapeake Group (a nationally recognized market analysis, urban planning, and economic development consulting firm) produced a Market Assessment of the City of Novi that included a quantitative analysis to identify future economic opportunities in the City through 2015. This Market Assessment included a demand forecast for retail, office and industrial floor space. Projected residential housing growth in the City was a major component of the demand forecast. Since the market for residential dwellings has changed considerably in the last year, projected housing growth figures used for the forecast are high.

Building on the conclusions and methodology of the Chesapeake Group's 2007 Market Assessment, this memorandum updates important assumptions of that report regarding housing starts and future retail floor space demand based on those starts. The time frame of the forecasts was extended to provide a ten-year forecast to better fit the City's Master Plan for Land Use Review. This report also contains a build-out forecast. These revised forecasts assume that all other factors used to develop the 2007 Market Assessment remain the same.

Conclusions

Recent economic conditions have slowed residential growth in the City of Novi, and this slower growth has slowed the demand for retail floor space. The following conclusions can be derived from this review:

2009 MASTER PLAN REVIEW RETAIL SPACE DEMAND FORECAST

March 3, 2009

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- Due to recent economic conditions, the rate of dwelling unit growth in the City of Novi has slowed and will likely not start to grow again until 2011;
- Between 2009 and 2018, it is likely that building permits for an additional 2,700 to 3,700 dwelling units will be issued;
- Given current zoning and master planned areas for residential development, the City could issue an additional 2,050 building permits for dwelling units, beyond the "High-End" forecast of 3,700 dwelling units, between 2018 and build-out;
- Slower residential growth will slow retail floor space demand;
- The City has a surplus of land zoned or planned for retail activities that will accommodate the High-End Retail Space Demand through 2018;
- This surplus of land could be considerably larger if the housing growth rate is slower or if retail floor space continues to be built at today's floor area per acre ratio;
- At the theoretical maximum residential build-out, the retail floor space demand could increase an additional 437,000 square feet beyond the High End demand for 2018; and
- At the theoretical maximum residential build-out, which does not take into account the fact that the build-out number may not be reached since the estimate did not exclude right-of-ways or other unbuildable land such as wetlands, an additional 67 acres of land (at various locations throughout the City) may be needed to provide space to build this additional retail floor space if all new retail development is built at an average of 6,000 square feet of retail per acre rather than the existing City retail center floor space ratio of 9,200 square feet per acre.

A detailed review of the methodology used to reach these conclusions follows:

Revised Housing Growth Forecast

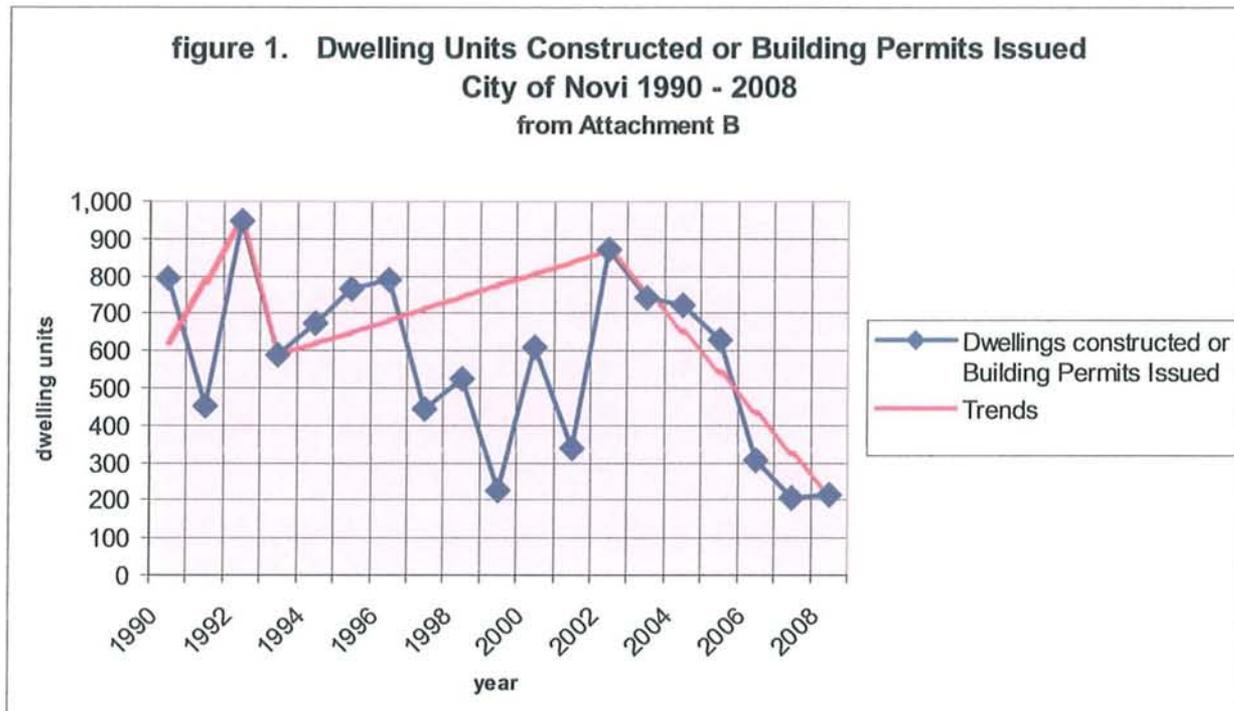
Recently, the City of Novi, like the rest of the county, has experienced a precipitous drop in building permits for new dwelling units. Between 1990 and 2005, an average of 630 new dwelling units per year were issued building permits in Novi. Building permits for new dwelling units dropped to 305 for 2006, which was less than one half the 16 year average, and the number fell again to 207 in 2007, less than one third the 16 year average. Although building permits issued for single family units continued to decline, the total number of new dwelling units issued building permits in 2008 increased slightly to 215 units in part due to the issuance of one permit for an 81 unit building in Erickson's Fox Run senior housing development. The three year average for 2005 to 2008 was 242 units, a drop of over 60% from the 1990 to 2005 average.

A review of past national housing starts, local dwelling unit construction and building permit data, and current economic trends was conducted to help estimate future housing growth for the City of Novi. Although the number of housing starts does not exactly match the number of building permits issued for dwelling units or the number of dwelling units constructed, the numbers are usually close since the lag time between the issuance of building permits and the completion of a home is typically short. City of Novi dwelling unit construction and building permit patterns have not matched national housing start trends but have shown some similarity. Therefore, this report will assume that national housing start patterns can be used to forecast future dwelling unit building permits

Over the last 30 years, the annual number of housing unit starts in the United States has fluctuated considerably. Twice during this period, the number of housing starts dropped by over 40% from a previous annual peak (see Attachment A). After both of these sharp drops, housing starts increased but at a slower rate than the rate of drop in starts. After the national number of

housing unit starts fell 47% in the four years ending in 1982, the number of housing starts increased by about 16% per year for the next four years; additionally, after the housing starts fell 44% in the five years ending in 1991, the number of starts increased by only 5% per year for the next 12 years. U.S. housing starts began to drop in 2006 and continued to drop through 2008. The total drop over this 3 year period was 56%.

A similar pattern occurred in the City of Novi since 1990 (see Attachment B). The number of new dwelling units constructed fell from a high of 947 to 599 between 1992 and 1993, a one



year drop of 61%. From 1994 through 2002, the number of new dwelling units constructed in the City of Novi increased at an annual average rate of 5.3% per year, reaching a peak of 871 dwelling units. Plotting the construction data for this time frame reveals several high and low points, but in order to smooth the volatile annual changes a longer 9 year time period was used.

Between 2003 and 2008, the number of new dwelling units constructed or issued building permits in the City experienced a total drop of 75% and an average annual drop of 12.6% (also see figure 1). Based on this information, a 5% per year increase may be considered a reasonable Low-End forecast of the annual dwelling unit building permit growth rate for Novi after the rate stops declining and 16% may be considered a reasonable High-End forecast. In order to be more optimistic with the Low-End forecast, consideration was given to the fact about 1,000 dwellings could be built in multiple family developments currently under construction in the City. Adding 2% per year to the Low-End dwelling unit building permit forecast will provide for most of these units to be constructed over the next ten years. Thus, this report will use **7% as a reasonable Low-End forecast** and **16% as a reasonable High-End forecast** of the annual dwelling unit building permit growth rate after the rate stops declining.

Most likely, the number of building permits issued for dwelling units in the City of Novi will continue to decline for 2009 and stay constant for 2010. In the University of Michigan's

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Research Seminar in Quantitative Economics, "The U.S. Economic Outlook for 2009-2010: November 2008," they predict that nationally, economic trends will continue to fall and not start to reverse until late 2009. This group predicts that in 2010, the economic indicators will see growth over 2009. They also predict national housing starts will bottom out in 2009 with another 13 percent drop from 2008 and then grow by 12.5 percent in 2010. These predictions assume the enactment of a federal stimulus package in early 2009. Housing growth could be much slower in Michigan. It will take longer for housing starts to recover in Michigan because of record unemployment (currently over 10%) due to the large loss of manufacturing and automobile related jobs. The University of Michigan predicts Michigan will lose 108,000 jobs in 2009 and another 24,000 in 2010. A slight increase in jobs is predicted for 2011. Job losses in the construction trades are predicted to stabilize in 2010.

Applying the University of Michigan's **national housing start forecast drop of 13%** to actual dwelling unit building permits issued in Novi in 2008, the number of **building permits issued for dwelling units in the City could drop to approximately 190 for 2009**. Based on the State continuing to lose jobs in 2010, although at a slower rate, it would be reasonable to forecast building permits for dwelling units in Michigan communities, including the City of Novi, to **remain about same for 2010 as the number issued in 2009**. If the economy gains strength in 2011 as predicted, the City should start to see an increase in dwelling unit building permits issued.

Applying a Low-End forecast of 7% growth in dwelling unit building permits issued per year for 2011 and later will result in the issuance of building permits for roughly 2,700 additional dwelling units over the ten year period ending in 2018. If a High-End forecast of 16% growth per year is applied to 2011 and beyond, about 3,700 new dwelling units could be issued permits by the end of 2018 (see Table 1 and Figure 2). These **forecasts provide a range of 2,700 to 3,700 building permits for new dwellings between 2009 and 2018.**

Changing economic factors could result in less residential growth than predicted in the above forecasts. Many factors have contributed to the current reduction in the number of housing starts nationally including recession fears, higher unemployment, low consumer confidence, the "underwater effect" (where a home owner owes more on their home than it is worth), tighter credit, slower household formation, a high number of foreclosure sales, and a large number of resetting sub-prime mortgages. Locally, the factors are similar to national factors and may even be worse due to the huge slow down in the automotive sector.

The Chesapeake Group noted in their 2007 Market Assessment of the City of Novi that residential growth could be slowed by the following factors:

1. Continuing issues with the Michigan and/or national economy;
2. Changes in the ability to finance residential development;
3. Changes in the mortgage market requirements;
4. Less pressure for household movement due to declining housing prices;
5. Weakness in the housing market;
6. Changes in interest rates;
7. Cost of living exceeding rises in income levels; and
8. The tightening of immigration policies.

The first five items on this list have already contributed to Michigan's current slow housing market.

2009 MASTER PLAN REVIEW RETAIL SPACE DEMAND FORECAST

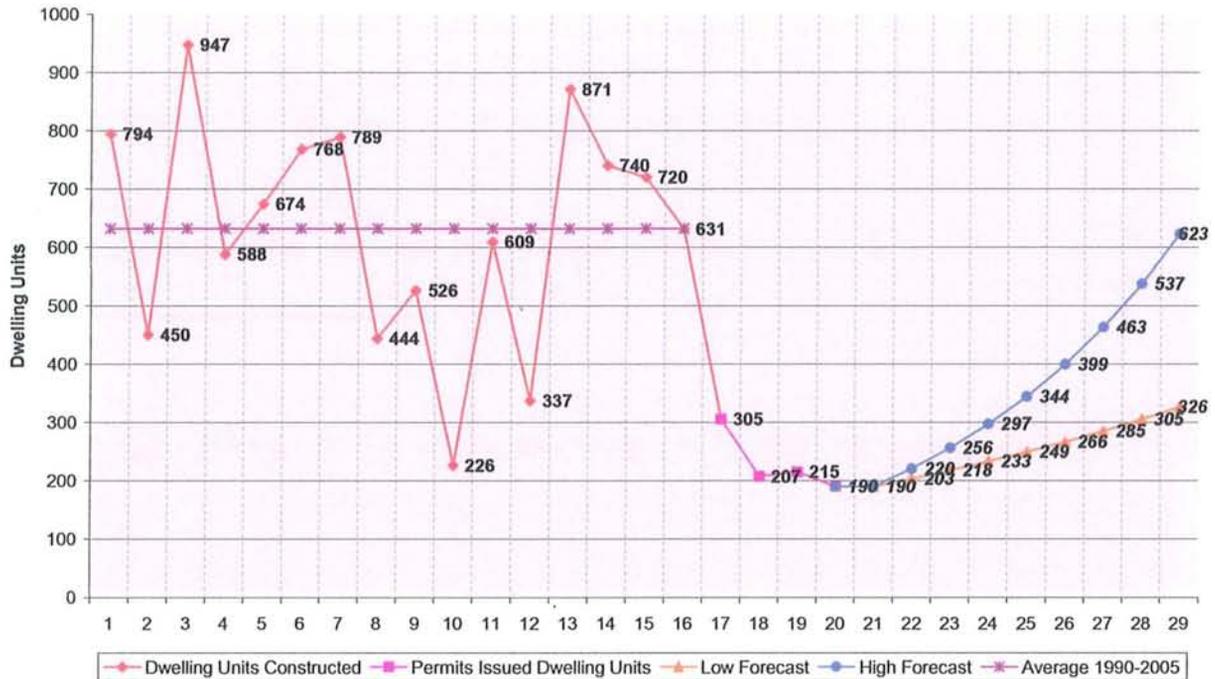
March 3, 2009

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Table 1 City of Novi Dwelling Units Issued Building Permits 1990 – 2008 and Dwelling Unit Building Permit Forecasts 2009 – 2018

Year	Dwelling Units Issued Building Permits	Low-End Dwelling Unit Building Permit <u>Forecast</u> (at 7% growth 2011 and later)	High End Dwelling Unit Building Permit <u>Forecast</u> (at 16% growth 2011 and later)
1990	794		
1991	450		
1992	947		
1993	522		
1994	674		
1995	768		
1996	789		
1997	444		
1998	526		
1999	226		
2000	609		
2001	337		
2002	871		
2003	740		
2004	720		
2005	631		
2006	305		
2007	207		
2008	215		
2009		190	190
2010		190	190
2011		203	220
2012		218	256
2013		233	297
2014		249	344
2015		266	399
2016		285	463
2017		305	537
2018		326	623
Total Forecast 2009-2018		Low-End 2,681 (round to 2,700)	High-End 3,734 (round to 3,700)

Figure 2 - City of Novi - Dwelling Units Constructed & Building Permits Issued 1990-2008 & Forecast 2009-2018
 from Table 1 1990-2008 actual and 2009 - 2018 forecast



Revised Retail Demand Forecast

The long-term viability of commercial areas is dependant upon the market penetration or the share of households that conduct business in an area and household income in the area. A major component of The Chesapeake Group's 2007 Market Assessment was a commercial space demand forecast. The forecast was based on many factors. The following revised retail floor space demand forecast will assume that these factors will not change. The Market Assessment's 2007 retail floor space demand forecast was based on the construction of between 400 and 600 dwelling units per year from 2008 through 2015. This equated to a total dwelling unit increase of between 3,200 and 4,800 dwelling units through 2015. Based on available land and the City's Master Plan, the 2007 Market Assessment's housing growth forecast was broken down by Zip Code Areas, with 45% of the growth projected for the combined 48375 and 48377 Zip Codes Area, 41% for the 48374 Zip Code Area and 14% for the 48167 Zip Code Area. Although Zip Code 48167's boundaries extend beyond the City of Novi, the projected residential growth is only for that portion of the Zip Code Area 48167 located in the City (see City of Novi Zip Codes map).

Using national, regional and local data, and the above residential growth by Zip Code Area ratio, The Chesapeake Group's 2007 Market Assessment predicted the square footage of additional floor space for retail goods and related services that could be supported at all locations (outside and inside of the City) by the three Zip Code Areas (see Table 2 and Zip Code Area Map for locations). The Assessment concluded that each future dwelling unit built in the City would produce a demand for about 214 square feet of retail space. In addition, the Market

Table 2 – Dwelling Unit Forecast and Retail Space Demand Forecast as presented in the 2007 Chesapeake Group Market Assessment

Zip Code Area (see Zip Code Area Map for locations)	Area Growth Percentage Factor	2008 – 2015 Growth Low Forecast (Dwelling Units)	2008 – 2015 Growth High Forecast (Dwelling Units)	2008 – 2015 Growth Low Retail Space Demand Forecast (Square Feet)	2008 – 2015 Growth High Retail Space Demand Forecast (Square Feet)
48375 and 48377	45%	1,440	2,160	308,000	462,000
48375 and 48377 Regional Serving				110,000	200,000
48374	41%	1,310	1,970	281,000	420,000
48167	14%	450	670	96,000	144,000
Total	100%	3,200	4,800	795,000	1,226,000

Dwelling units rounded to nearest 10 Space forecast rounded to nearest 1,000 square feet

Assessment predicted the City had the potential to capture an additional 110,000 to 200,000 square feet of regional serving retail floor space. The Assessment stated that the most probable place for this retail to locate was in the Zip Code Area 48375 and 48377. This would increase the Assessment's 2008 – 2015 Growth Low Forecast for the 48375 and 48377 Zip Code Area to 418,000 square feet and the High Forecast to 662,000 square feet. This increases the City-wide Retail Space Demand Low Forecast to 795,000 square feet and the High Forecast to 1,226,000 square feet. The Chesapeake Group noted that this forecast could change if land use and zoning classifications changed and a larger supply of property became available for dwelling units.

A decline in housing starts in the City of Novi will most likely slow the demand for new retail space in the City. A new 2008-2018 Retail Space Demand Forecast (Table 3) was developed using the same ratio of dwelling units per Zip Code Area and the same retail floor space demand ratio of 214 square feet per dwelling unit that was used in the 2007 Market Assessment. These ratios were applied to the new Low End and High-End Dwelling Unit Building Permit Forecast from Table 1 to produce the Revised Retail Space Demand Forecast. It should be noted that this forecast was extended to 2018 (ten years) to match the new

Table 3 – 2008 - 2018 Dwelling Unit Growth Forecast and Retail Space Demand Forecast based on Dwelling Unit Building Permit Forecasts 2009 – 2018 and Methodology in the Chesapeake Group's 2007 Market Assessment

Zip Code Area	Area Growth Percentage Factor	2008 – 2018 Low-End Growth Forecast (Dwelling Units)	2008 – 2018 High-End Growth Forecast (Dwelling Units)	2008 – 2018 Low-End Retail Space Demand Forecast (Square Feet)	2008 – 2018 High-End Retail Space Demand Forecast (Square Feet)
48375 and 48377	45%	1,210	1,670	260,000	357,000
48375 and 48377 Regional Serving				93,000	154,000
48374	41%	1,110	1,530	237,000	325,000
48167	14%	380	500	81,000	107,000
Total	100%	2,700	3,700	671,000	943,000

Dwelling units rounded to nearest 10 Space forecast rounded to nearest 1,000 square feet

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Dwelling Unit Building Permit Forecast's coverage and to coincide with the ten year time frame typically used in a land use master plan. Even with the Revised Retail Space Demand Forecast's extended time frame, its Low-End Retail Floor Space Demand Forecast is 16% less than predicted in the 2007 Market Assessment's Low forecast and its High-End Retail Demand Forecast is 23% lower than the high forecast in the 2007 Market Assessment. The 2007 Market Assessment's Low and High-End Regional Serving Retail Space Demand was reduced by these same percentages for the 2008 Forecast to reflect an equal drop in housing growth in the County.

The 2007 Market Assessment stated that even with the 500,000 square feet of retail in process in the City, that retail space demand generated from new residential construction will be higher

Table 4 – Retail Developments Completed in 2008 and Under Construction and Planned 12/31/08

Development	Completed 2008 (Square Feet)	Under Construction (Square Feet)	Planned (Square Feet)	Type Center	Zip Codes
West Market Square	25,000	3,000	9,000	Community	48374
Novi Promenade	0	0	111,000*	Community	48374
Shoppes at the Trail	0	3,000	0	Local	48377
Vistas (Sandstone)	0	4,000	155,000*	Local	48377
Twelve Oaks Mall outlots (Best Buy)	0	0	6,000	Regional	48377
Twelve Mile Crossing at Fountain Walk	0	0	17,000	Regional	48377
Gateway Village	14,000	0	0	Local	48375
Novi Town Center	26,000	0	0	Regional	48375
Main Street	0	0	118,000	Community	48375
City Center Plaza	6,000	4,000	0	Local	48375
Vantage Pointe	10,000	0	0	Local	48375
TOTAL	81,000	14,000	416,000		

* Balance permitted under terms of a consent judgment

than this amount. This still holds true in the revised 2008 Retail Space Demand Forecast. Since the 2007 Market Assessment was completed in December of 2007, a total of 511,000 square feet of retail floor space was either completed, under construction or contemplated on an approved site plan or a court order. About 81,000 square feet of this planned or in-process floor space was completed in 2008 leaving 430,000 square feet under construction, permitted or planned. Table 4 provides the status and locational details of these projects.

Next, the floor space of completed, under construction and planned retail development was subtracted from the Revised 2008 Retail Space Demand Forecast by Zip Code Area to produce a 2008 Remaining Retail Space Demand Forecast (see Table 5). The results of these calculations produced for the whole City a Remaining Low-End Retail Space Demand Forecast of 160,000 square feet and a Remaining High-End Retail Space Demand Forecast of 432,000 square feet.

Locational Aspects

The next portion of this report will discuss the potential locations for the forecasted future retail space. First, potential development parcels were mapped for the entire City. This map included all vacant and underdeveloped parcels. Next, each of the parcels located within an existing zoning district that permits retail development or located in an area depicted in the City of Novi

2009 MASTER PLAN REVIEW RETAIL SPACE DEMAND FORECAST

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Table 5 –Remaining Retail Space Demand Forecast 2008 – 2018 by Area

Zip Code Area	Total Low-End Retail Space Demand Forecast (Square Feet)	Total High-End Retail Space Demand Forecast (Square Feet)	Completed 2008 (Square Feet)	Under Construction (Square Feet)	Planned (Square Feet)	Remaining Low-End Retail Space Demand Forecast (Square Feet)	Remaining High-End Retail Space Demand Forecast (Square Feet)
48375 & 48377	353,000	511,000	56,000	11,000	296,000	(-10,000)	148,000
48374	237,000	325,000	25,000	3,000	120,000	89,000	177,000
48167	81,000	107,000	0	0	0	81,000	107,000
Total	671,000	943,000	81,000	14,000	416,000	160,000	432,000

Note: Remaining Retail Space Demand equals Total Retail Space Demand less Completed 2008, Under Construction and Planned Projects

Master Plan for Land Use, updated in 2008, as an area planned for retail development were identified. This small set of potential retail development parcels totals 108 acres (see attached West, Northwest, Central and South Area Shopping Centers and Potential Retail maps for locations). With this information the potential square footage of retail floor space that the total acres of potential retail land available in each Zip Code Area could provide was calculated.

The Retail/Shopping Center Recap City of Novi, produced in February of 2009, shows that the 650 acres of retail centers averaged about 7,300 square feet of ground floor space per acre and 9,200 square feet of total retail floor space per acre. For this Forecast, a very conservative 6,000 square feet of retail space per acre of potentially developable land was used to calculate land area demand. This was done to account for site issues that could reduce the developable area available and because most retail development is one story. Properties located in areas master planned for Gateway and Town Center uses were further reduced by 66% since it is

Table 6 – 2008 – 2018 Low-End and High-End Remaining Retail Floor Space Demand with Land Area Not Provided, by Zip Code Area

Zip Code Areas	Potential Area Planned or Zoned for Retail Uses Available (Acres)	Potential Floor Space at 6,000 Square Foot per Acre	Remaining Low-End Retail Floor Space Demand Forecast (Square Feet)	Remaining High-End Retail Floor Space Demand Forecast (Square Feet)	Low-End Remaining Retail Floor Space Demand with <u>Land Area Not Provided</u> (Square Feet)	High-End Remaining Retail Floor Space Demand with <u>Land Area Not Provided</u> (Square Feet)
48375 & 48377	20	120,000	(-10,000)	148,000	(-220,000)	(-62,000)
48375 & 48377 Gateway properties	45 (at 1/3 retail & balance mixed use)	90,000				
48374	43	258,000	89,000	177,000	(-169,000)	(-81,000)
48167	0	0	81,000	107,000	81,000	107,000
Total	108	468,000	160,000	432,000	(-308,000)	(-36,000)

Note: negative numbers indicate a surplus of potential floor space

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very likely that these properties will be developed with a mix of uses. The results of these calculations show that if taken as a whole, and even using the conservative estimate of 6,000 square feet of retail floor space per acre, the City will have a surplus of land available to accommodate the Remaining Low-End and High-End Retail Floor Space Demand forecasts through 2018 (see Table 6).

A review of the forecasted retail demand by zip code area reveals that Zip Code Area 48167 could have a retail space demand shortage of up to about 107,000 square feet by 2018. But this demand could be met by the surplus of potential retail floor space available in combined Zip Code Area 48375 and 48377 and Zip Code Area 48374, and in areas outside of the City, since survey and interview information gathered during the 2007 Master Plan Review indicates that residents in and near the Southwest Quadrant of the City (most of "Zip Code Area 48167") said they would rather travel further to retail services than to see retail services constructed in the Southwest Quadrant of the City. These areas currently contain vacant and underdeveloped properties that are zoned or master planned for retail activities.

Table 7 – Under Construction and Approved Residential Developments

Name	Type Development	Dwelling Unit Balance	Status	Zip
Orchard Hills North	Site Condominium	12	U.C.	48375
Lenox Park	Duplex Condominiums	64	U.C.	48377
Fox Run	Apartments	750 (500 at 2/3 for senior housing)	U.C.	48377
Liberty Park Condos	Duplex Condominiums	300	U.C.	48377
Society Hill	Apartments	312	Approved Final Site Plan	48377
Uptown Place	Apartments	140	Approved Preliminary Site Plan	48377
Uptown Park	Condominiums	201	Approved PRO Plan	48377
Scenic Pines	Site Condominium	24	Approved Final Site Plan	48377
Bolingbroke	Site Condominium	46	U.C.	48377
Rushmore	Site Condominium	7	Approved Final Site Plan	48374
Casa Loma	Site Condominium	10	Approved Preliminary Site Plan	48167
Total Dwelling Units	48375	12		
	48377	1,587		
	48374	7		
	48167	10		
	Total	1616		

Future Years

In order to forecast retail floor space demand beyond 2018, a residential build-out analysis was conducted by zip code area. First, all potential residential development parcels were identified. These included all vacant parcels located in areas master planned for residential uses and developed parcels over 5 acres in area that only included one residential home. Next, the gross area of these parcels was multiplied by the maximum proposed residential density, as depicted in the Master Plan for Land Use's Residential Density Map, updated in 2008. This forecast is likely to be higher than will actually happen, since some of the 5 acre and larger sites with one home may continue as a one-family home site and not be developed for additional dwelling units and since undevelopable land such as right-of-ways, wetlands and watercourses were not excluded from the gross area of these parcels.

Next, a list was compiled of all residential projects under construction or with site plan approval (see Table 7). An exception was made for the Singh property, located south of Ten Mile Road in Section 30, since the property owners have submitted a revised development proposal. This property was placed in the potential residential development parcels group. Also, the 750 dwelling unit balance for the Fox Run senior housing development was factored at 2/3 of a dwelling unit per unit since some of the units are for assisted living whose occupants typically have little impact on retail sales.

Next, vacant residential lots in developed subdivisions and site condominium projects were identified. The location of the above three items, potential residential development parcels, residential projects under construction or with site plan approval and vacant residential lots, are depicted on the attached City of Novi Potential Residential Build-Out Development Parcels map. In addition, dwelling units could be constructed in mixed use projects in the Town Center and Gateway Zoning Districts. About 88 acres of undeveloped or underdeveloped properties were identified for future mixed use developments, all located in Zip Code Area 48375-48377. An estimated 10 dwelling units per acre could be developed with other uses on these sites. This equates to an additional 880 dwelling units.

Table 8 –Residential Build-Out Forecast

Zip Code Area	Gross Area Potential Residential Development Parcels X Dwelling Units Per Acre (Master Plan for Land Use 2008)	Dwelling Units Under Construction or with Site Plan Approval (Fox Run senior housing at 2/3 dwellings per unit)	Vacant Lots in Developments	Potential Mixed Use Dwelling Units	Total Potential Dwelling Units Per Zip Code Area	Percent of Total New Dwelling Units 2008 Through Build-Out
48375 and 48377	235	1,599	413	880	3,127	54%
48374	1,562	7	507	0	2,076	36%
48167	401	10	154	0	564	10%
Total	2,054	1,616	1,074	880	5,767	100%

Totaling the potential number of dwelling units that could be placed on residentially zoned and planned land, the number of available single family vacant residential lots, the number of units available in planned and under construction developments and the number of potential dwelling units in mixed use developments produces a Residential Build-Out Forecast of about 5,800

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dwelling units (see Table 8). This is about 2,050 more dwelling units than predicted by the 2008 – 2018 High-End Dwelling Unit Forecast. The percentage of the dwellings predicted for each Zip Code Area at build-out is similar to the percentages found in the 2007 Market Assessment

This additional 2,050 dwelling units has the potential of generating an additional 439,000 square feet of retail floor space demand at build-out. After subtracting the forecasted surplus of High-End Remaining Retail Space Demand with Land Area Not Provided the High-End Additional Remaining Retail Space Demand at Build-Out with Land Area Not Provided is 403,000 square feet. At a conservative 6,000 square feet of retail space per acre, 67 acres of additional retail land will be required at build-out to construct enough retail floor space to meet the High-End forecasted retail space demand (see table 9). And, again, the theoretical number of new dwelling units at build-out assumes a density higher than that which is actually likely, because it is based on gross acreage (not excluding right-of-way, wetlands, etc.).

Table 9 – Additional Dwelling Units, Retail Floor Space Demand Forecast and Additional Land Area Required to Meet Retail Space Demand at Build-Out Forecast

Zip Code Area	Potential Build-Out (Dwelling Units)	2008 – 2018 High-End Growth Forecast (Dwelling Units)	Potential at Build-Out Beyond 2018 High-End Forecast (Dwelling Units)	Potential Retail Demand Beyond 2018 High-End Forecast (Square Feet)	High-End Retail Floor Space Demand with Land Area Not Provided (Square Feet)	High-End Additional Retail Space Demand at Build-Out With Land Area Not Provided (Square Feet)	Additional Land Area Required at Build-Out to Meet Remaining Retail Space Demand (Acres)
48375 and 48377	3,130	1,670	1,440	308,000	(-62,000)	246,000	41
48374	2,080	1,530	550	118,000	(-81,000)	37,000	6
48167	560	500	60	13,000	107,000	120,000	20
Total	5,770	3,700	2,050	439,000	(-36,000)	403,000	67

Note: figures rounded from previous tables - * negative numbers indicate a surplus

It should be noted that if additional areas are planned for residential development, or if the permitted residential densities are increased, the number of dwelling units forecasted at build-out will increase and this will increase the forecasted demand for retail space. In addition, major demographic shifts could also change the housing forecast. As with any forecast, the facts used to develop the forecast should be monitored and adjustments should be made to the forecast to keep it current.

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"The U.S. Economic Outlook for 2009-2010," University of Michigan Research Seminar in Quantitative Economics, Ann Arbor, November 2008

U.S. Housing Starts - Trends 1978 - 2008

Attachment A
February 23, 2009

Source: U.S. Housing Starts, U.S. Census Bureau 2009

Year	Single-Family	Multifamily	Total	Change	% Change from Previous Year	notes	
2008	569,000	323,000	892,000	-463,200	-34.2%	Total Drop 2005-2008	56.9%
2007	1,045,900	309,200	1,355,200	-445,700	-24.7%	Average Annual Drop over 3 Years	-24.0%
2006	1,465,400	335,500	1,800,900	-267,400	-12.9%		
2005	1,715,800	352,500	2,068,300	112,500	5.8%	Average Annual Increase over 14 Years	5.4%
2004	1,610,500	345,300	1,955,800	108,100	5.9%		
2003	1,499,000	348,700	1,847,700	142,800	8.4%		
2002	1,358,600	346,400	1,704,900	102,200	6.4%		
2001	1,273,300	329,400	1,602,700	34,000	2.2%		
2000	1,230,900	337,800	1,568,700	-72,200	-4.4%		
1999	1,302,400	338,500	1,640,900	24,000	1.5%		
1998	1,271,400	345,500	1,616,900	142,900	9.7%		
1997	1,133,700	340,300	1,474,000	-2,800	-0.2%		
1996	1,160,900	316,100	1,476,800	122,700	9.1%		
1995	1,076,200	277,900	1,354,100	-102,900	-7.1%		
1994	1,198,400	258,700	1,457,000	169,400	13.2%		
1993	1,125,700	162,000	1,287,600	87,900	7.3%		
1992	1,029,900	169,900	1,199,700	185,800	18.3%		
1991	840,400	173,500	1,013,900	-178,800	-15.0%	Total Drop 1986-1991	43.8%
1990	894,800	298,000	1,192,700	-183,400	-13.3%	Average Annual Drop over 5 Years	-10.9%
1989	1,003,300	372,900	1,376,100	-112,000	-7.5%		
1988	1,081,300	406,700	1,488,100	-132,400	-8.2%		
1987	1,146,400	473,800	1,620,500	-184,900	-10.2%		
1986	1,179,400	626,000	1,805,400	63,600	3.7%	Average Annual Increase over 4 Years	16.6%
1985	1,072,400	669,500	1,741,800	-7,700	-0.4%		
1984	1,084,200	665,300	1,749,500	46,500	2.7%		
1983	1,067,600	635,500	1,703,000	640,800	60.3%		
1982	662,600	399,700	1,062,200	-22,000	-2.0%	Total Drop 1978-1982	47.4%
1981	705,400	378,900	1,084,200	-208,000	-16.1%	Average Annual Drop over 4 Years	-14.4%
1980	852,200	440,000	1,292,200	-452,900	-26.0%		
1979	1,194,100	551,100	1,745,100	-275,200	-13.6%		
1978	1,433,300	587,100	2,020,300				

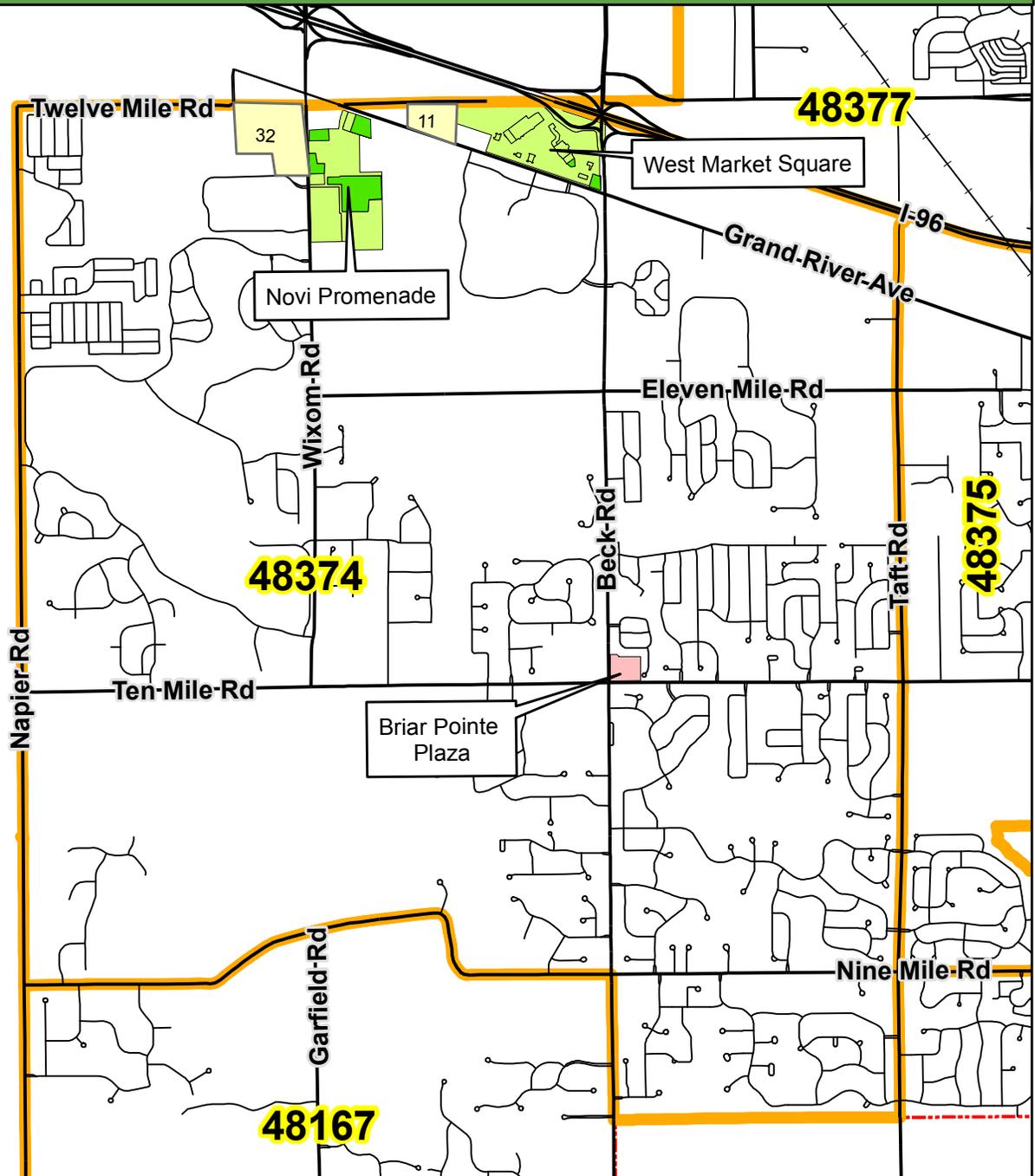
City of Novi - Housing Trends 1990 - 2008

Attachment B
February 23, 2009

Source: City of Novi

Year	Dwelling Units Constructed or Building Permits Issued	Change	% Change from Previous Year	notes	
2008	215	8	3.9%	Total Drop 2002-2008	-75.3%
2007	207	-98	-32.1%	Average Annual Drop Over 6 Years	-12.6%
2006	305	-326	-51.7%		
2005	631	-89	-12.4%		
2004	720	-20	-2.7%		
2003	740	-131	-15.0%		
2002	871	534	158.5%	Average Annual Increase Over 9 Years	5.3%
2001	337	-272	-44.7%		
2000	609	383	169.5%		
1999	226	-300	-57.0%		
1998	526	82	18.5%		
1997	444	-345	-43.7%		
1996	789	21	2.7%		
1995	768	94	13.9%		
1994	674	86	14.6%		
1993	588	-359	-37.9%	Total Drop 1992-1993	-37.9%
1992	947	497	110.4%		
1991	450	-344	-43.3%		
1990	794				

City of Novi - West Area Shopping Centers and Potential Retail



U.C. = Under Construction
Approved = Approved Site Plan

Shopping Centers and Potential Retail

	Local		Major Comparison		Intermediate U.C. or Approved
	Minor Comparison		Local U.C. or Approved		Major U.C. or Approved
	Intermediate Comparison		Minor U.C. or Approved		Potential Retail

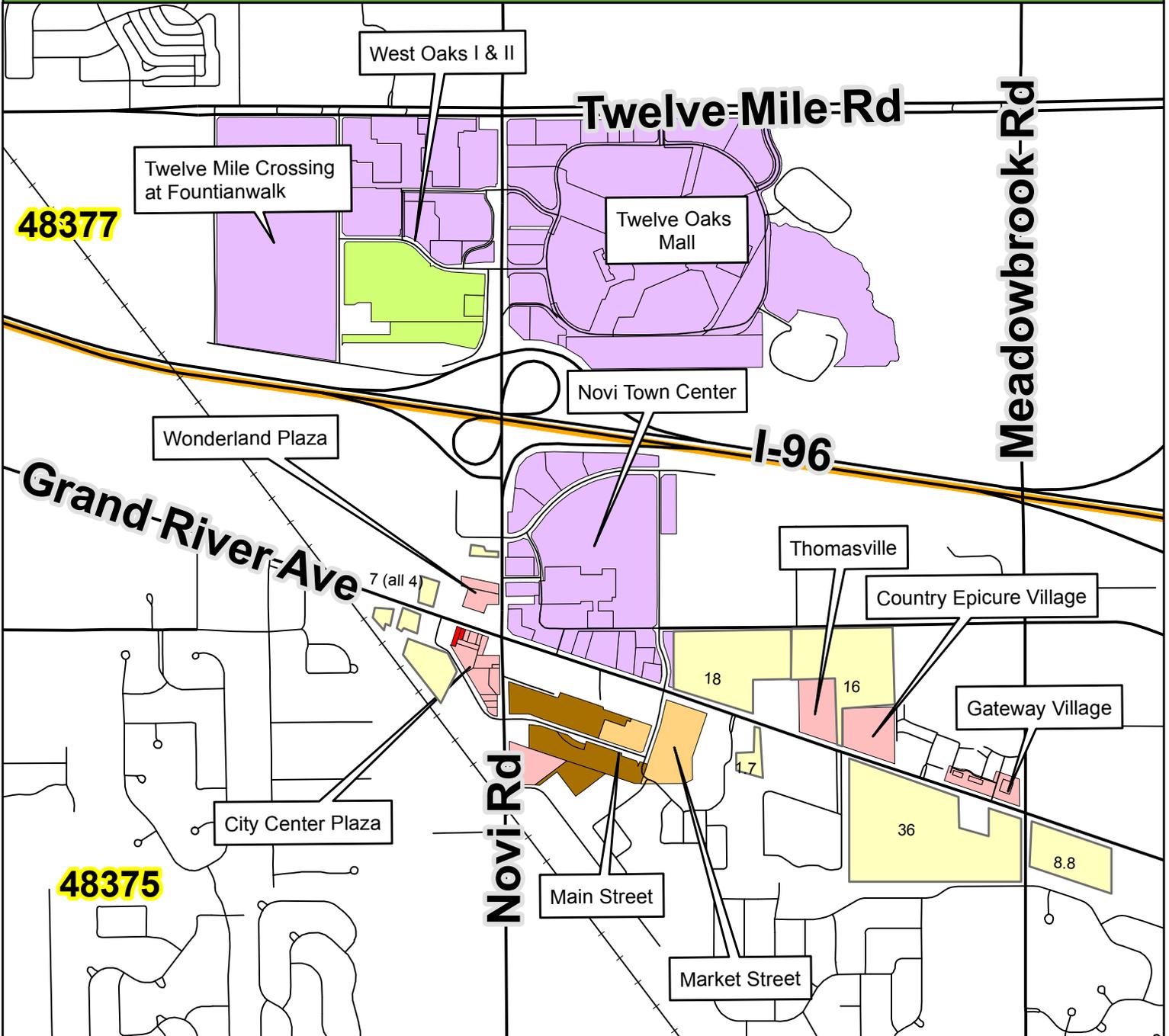


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MARK SPENCER, AICP, PLANNER
CREATED: 2/9/09



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City of Novi - Central Area Shopping Centers and Potential Retail



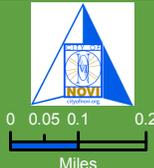
U.C. = Under Construction
Approved = Approved Site Plan

Shopping Centers and Potential Retail

- | | | |
|--|--|---|
|  Local |  Major Comparison |  Intermediate U.C. or Approved |
|  Minor Comparison |  Local U.C. or Approved |  Major U.C. or Approved |
|  Intermediate Comparison |  Minor U.C. or Approved |  Potential Retail |



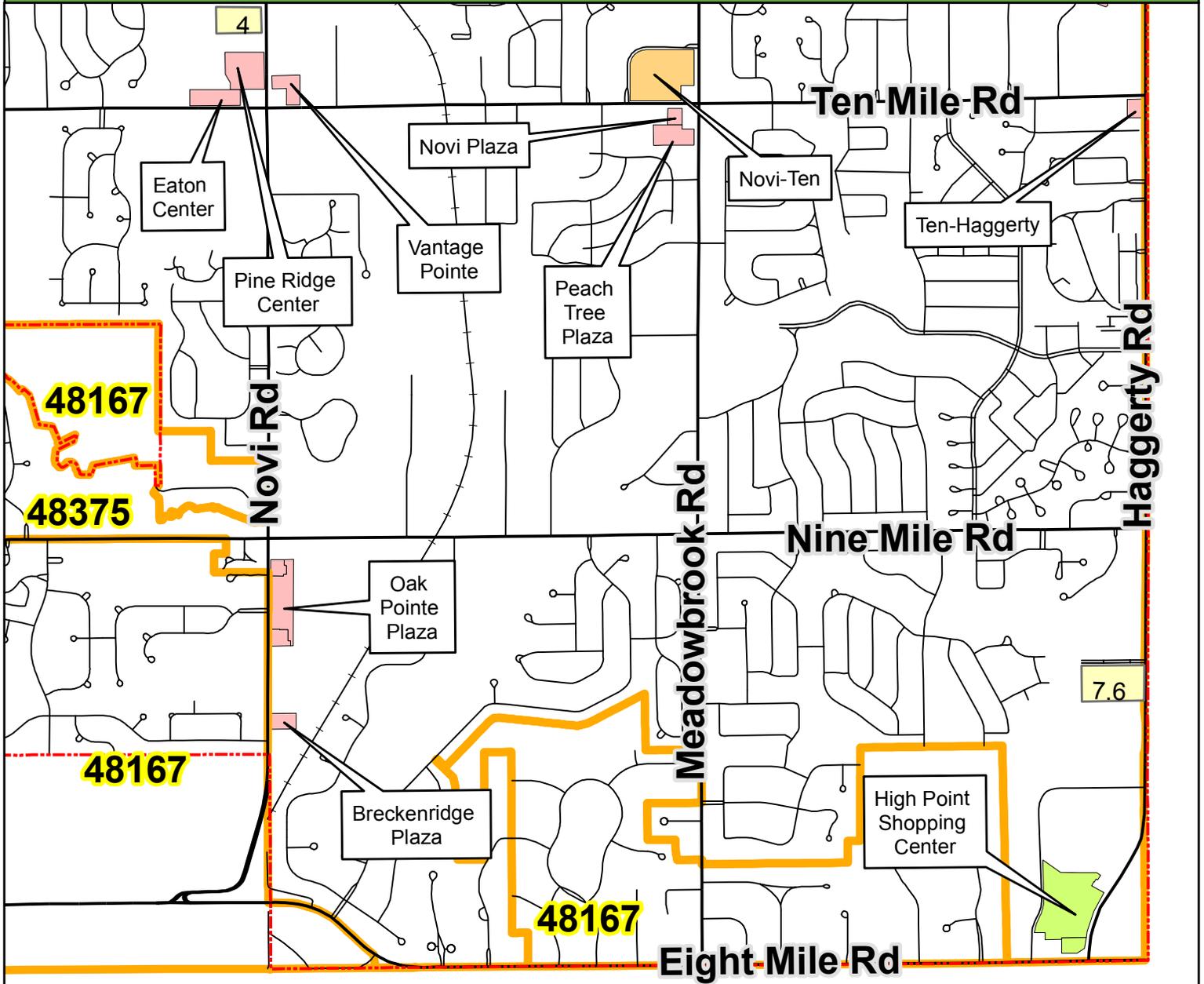
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City of Novi - South Area Shopping Centers and Potential Retail



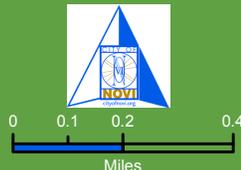
U.C. = Under Construction
Approved = Approved Site Plan

Shopping Centers and Potential Retail

 Local	 Major Comparison	 Intermediate U.C. or Approved
 Minor Comparison	 Local U.C. or Approved	 Major U.C. or Approved
 Intermediate Comparison	 Minor U.C. or Approved	 Potential Retail



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City of Novi - Northwest Area Shopping Centers and Potential Retail



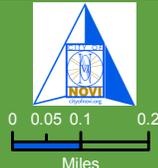
U.C. = Under Construction
Approved = Approved Site Plan

Shopping Centers and Potential Retail

 Local	 Major Comparison	 Intermediate U.C. or Approved
 Minor Comparison	 Local U.C. or Approved	 Major U.C. or Approved
 Intermediate Comparison	 Minor U.C. or Approved	 Potential Retail

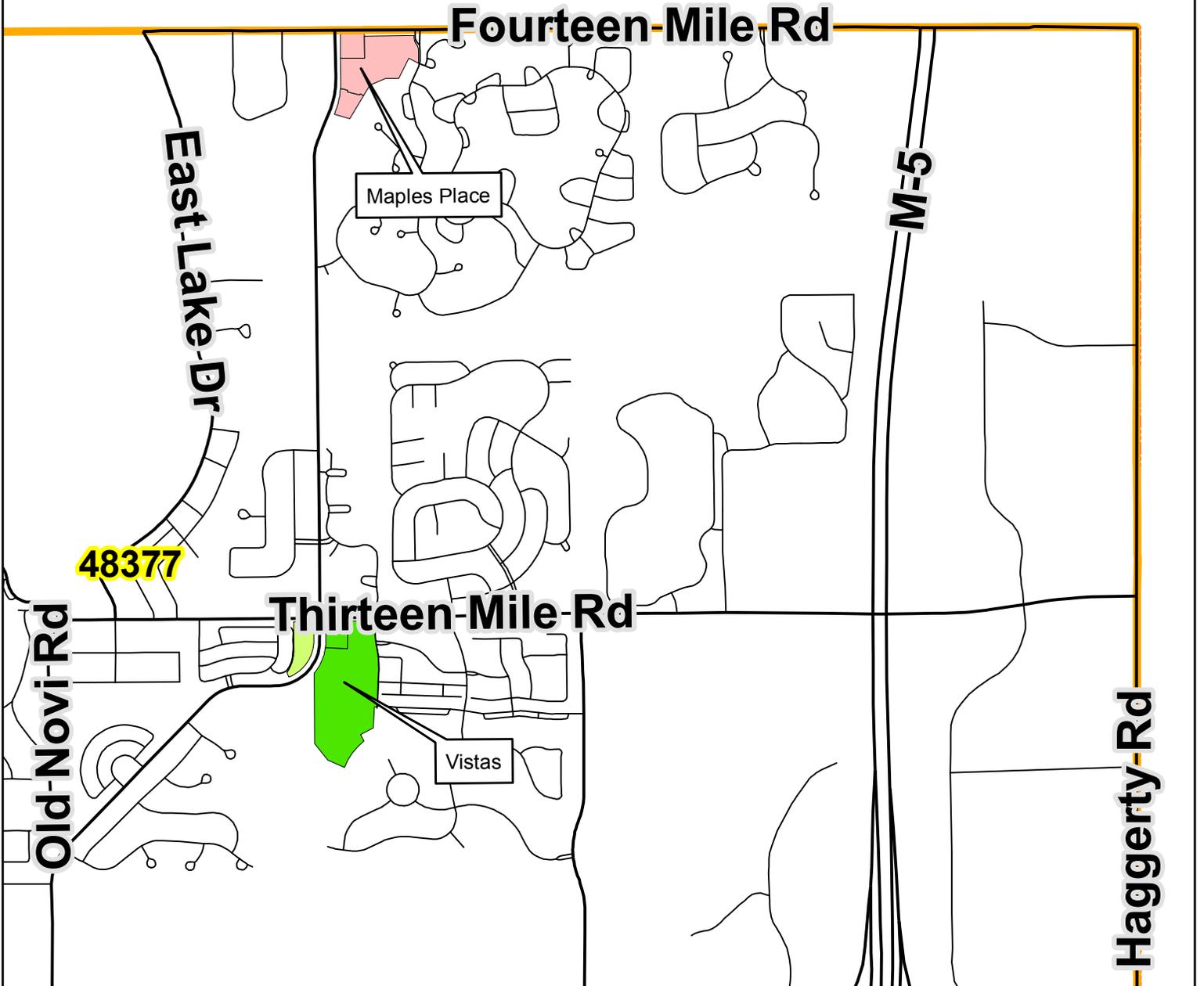


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NOVI, MI 48375-3024
(248) 347-0475
MARK SPENCER, AICP, PLANNER
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City of Novi - North Area Shopping Centers and Potential Retail



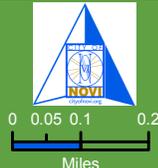
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Shopping Centers and Potential Retail

- | | | |
|--|--|---|
|  Local |  Major Comparison |  Intermediate U.C. or Approved |
|  Minor Comparison |  Local U.C. or Approved |  Major U.C. or Approved |
|  Intermediate Comparison |  Minor U.C. or Approved |  Potential Retail |



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City of Novi

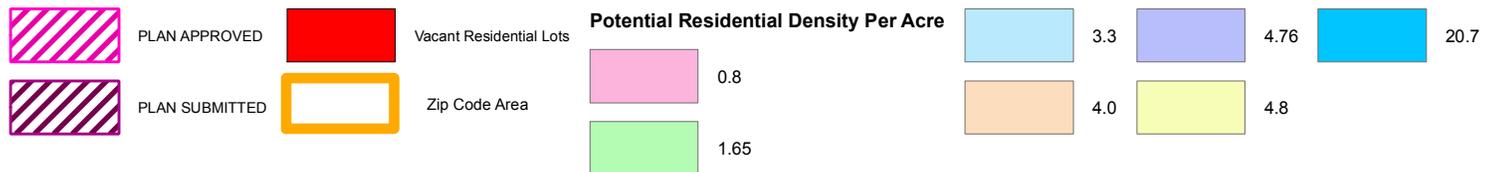
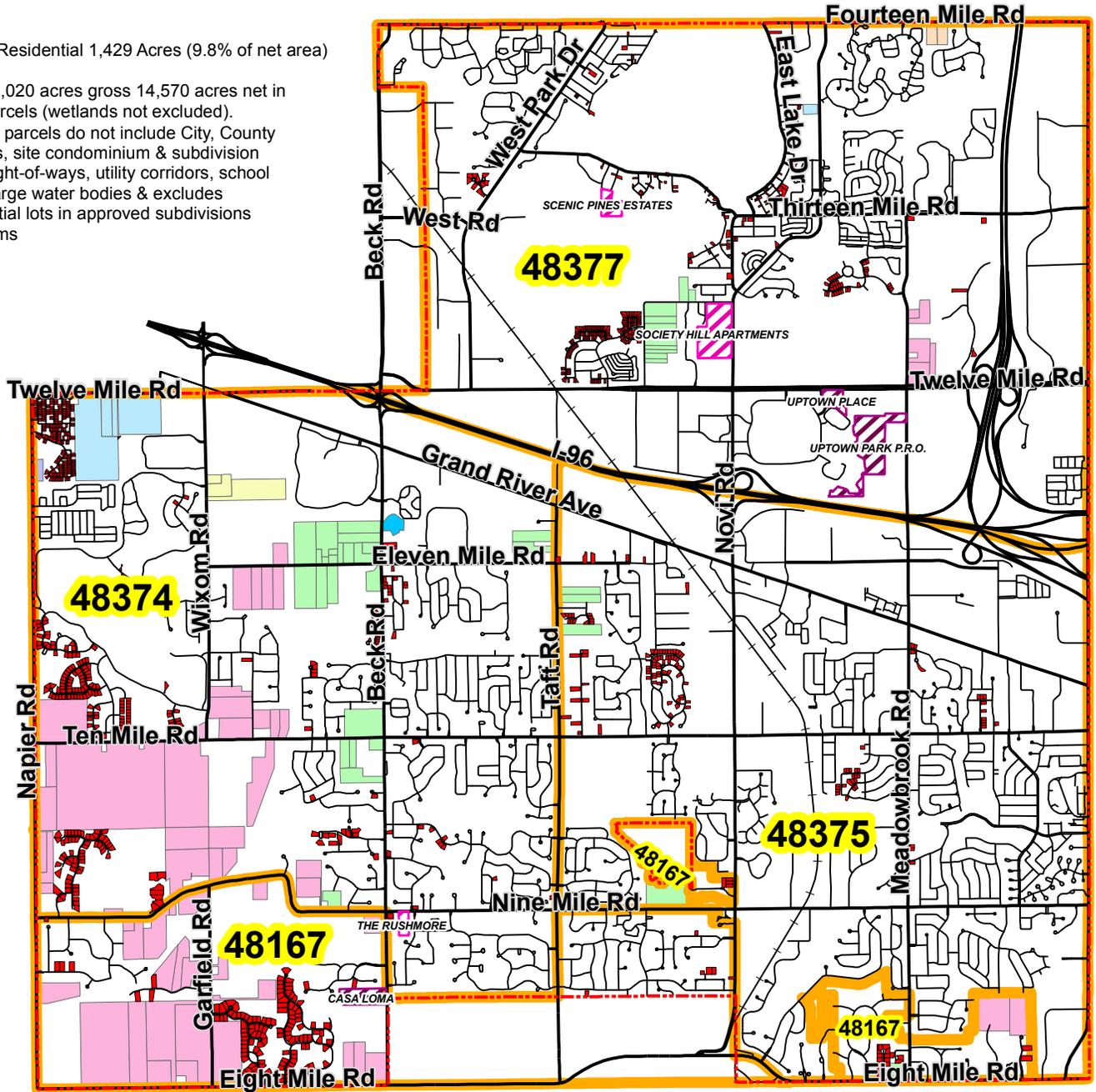
Potential Residential Buildout Development Parcels

Notes:

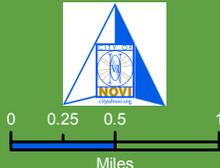
Total Potential Residential 1,429 Acres (9.8% of net area)

City of Novi=20,020 acres gross 14,570 acres net in developable parcels (wetlands not excluded).

* Development parcels do not include City, County & State parcels, site condominium & subdivision open space, right-of-ways, utility corridors, school property and large water bodies & excludes vacant residential lots in approved subdivisions or condominiums

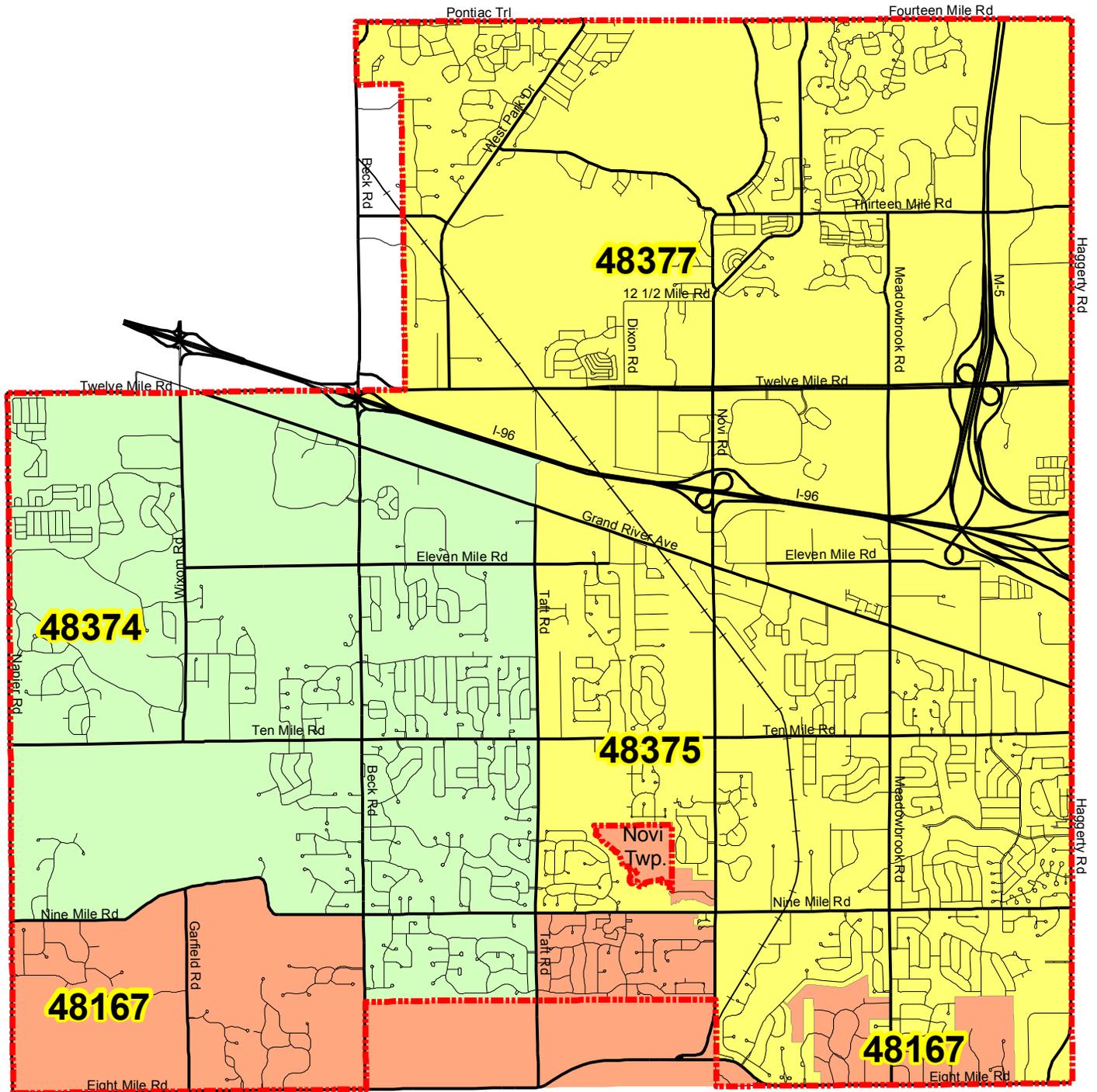


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City of Novi Zip Codes Areas



 City Incorporated Boundary

Note: The Chesapeake Group combined Zip Codes 48377 and 48375 in their 2007 Market Assessment into one area for forecasting purposes.



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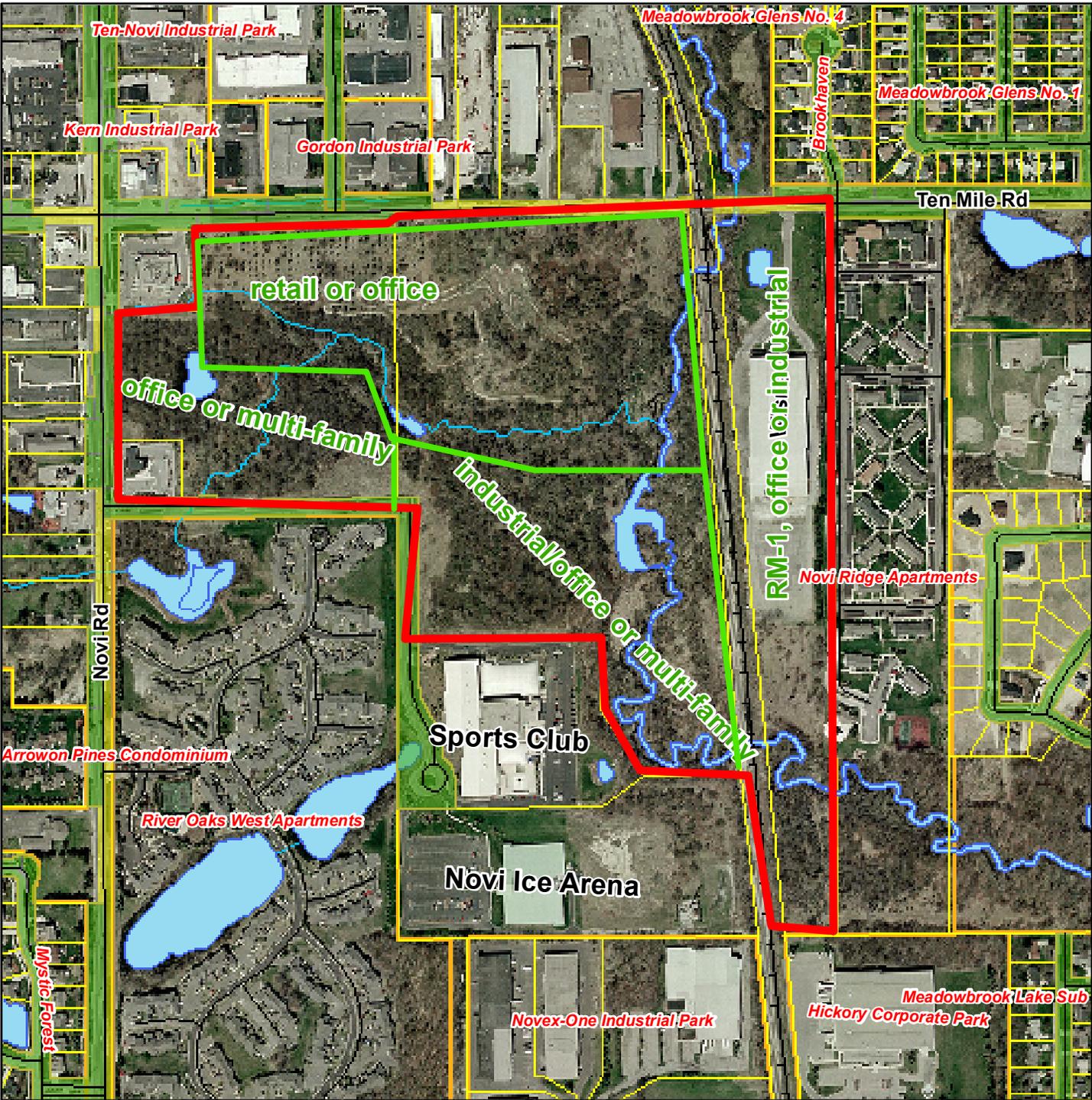


0 0.25 0.5 1
Miles

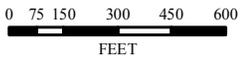
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Special Planning Project Area 1 Study Area Air Photo & Discussion Areas



 Study Area

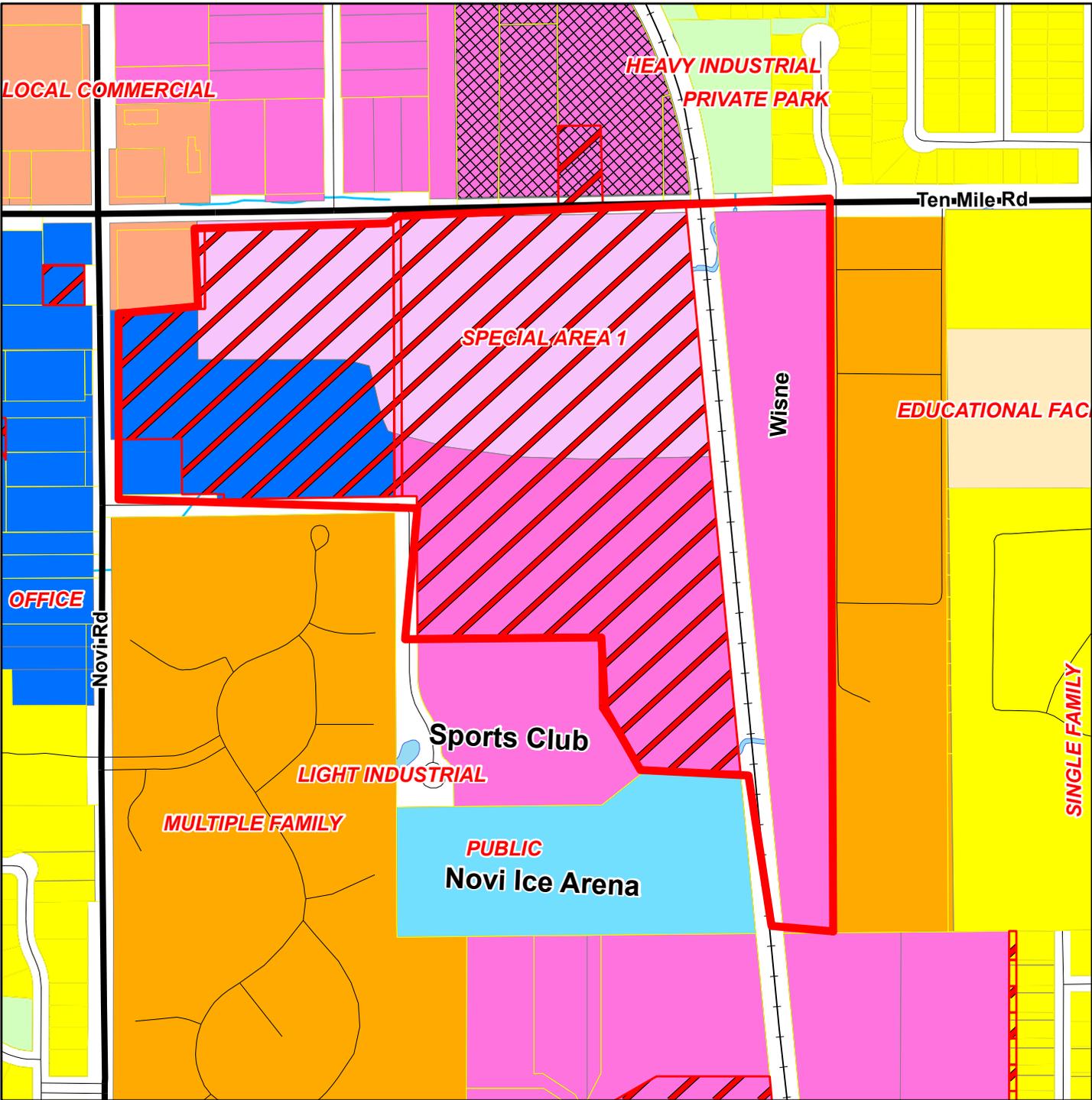


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Special Planning Project Area 1 Study Area Future Land Use



- Potential Development Parcels**
- Potential Commercial Development
 - potential residential
- Future Land Use**
- SPECIAL AREA 1
 - SINGLE FAMILY
 - PUD
 - MULTIPLE FAMILY
 - PD1
 - MOBILE HOME PARK
 - OFFICE
 - LOCAL COMMERCIAL
 - COMMUNITY COMMERCIAL
 - REGIONAL COMMERCIAL
 - TC COMMERCIAL
 - TC GATEWAY
 - PD2
 - LIGHT INDUSTRIAL
 - HEAVY INDUSTRIAL
 - PUBLIC
 - EDUCATIONAL FACILITY
 - PUBLIC PARK
 - PRIVATE PARK
 - CEMETERY
 - UTILITY

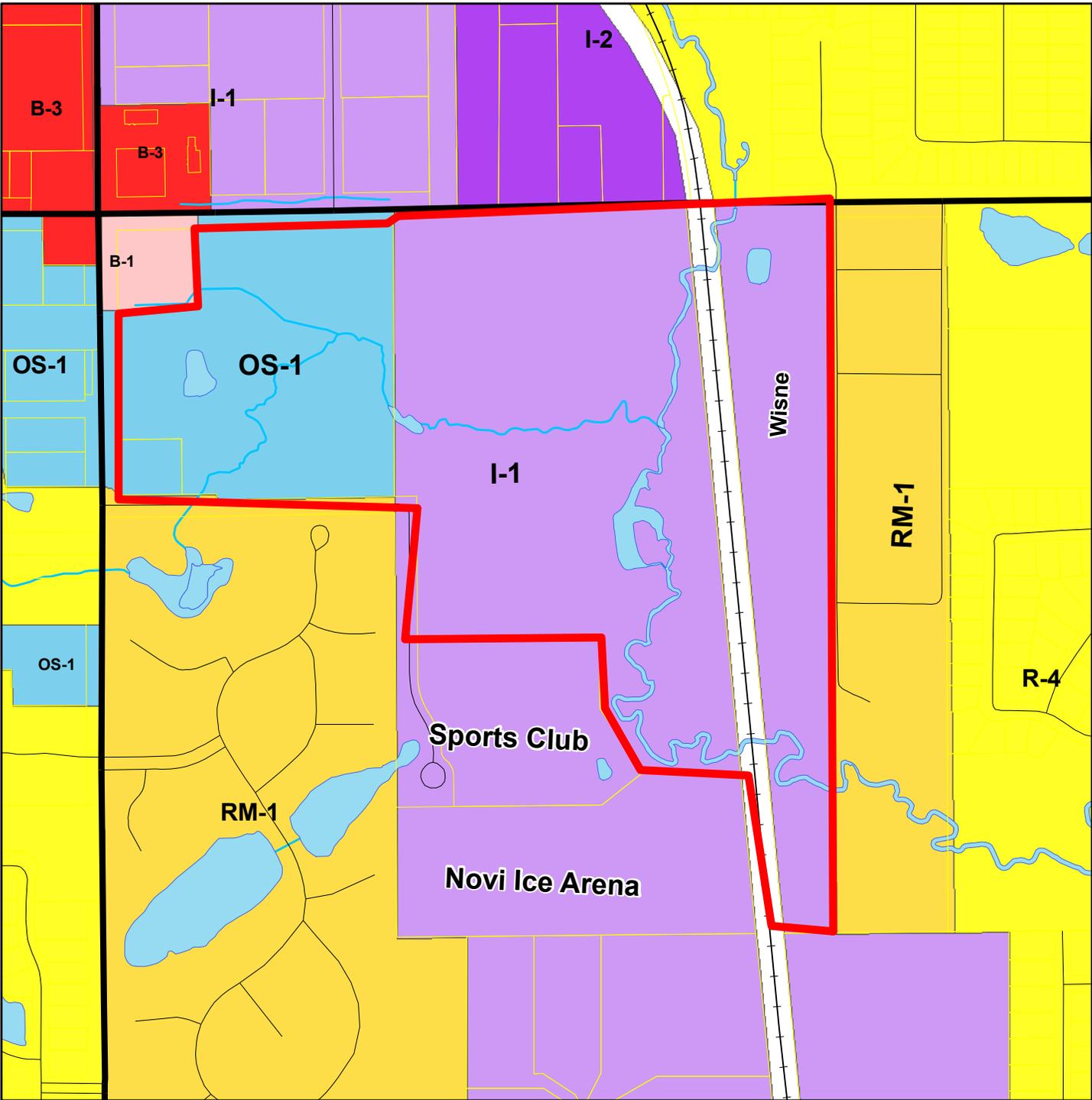


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Special Planning Project Area 1 Study Area Zoning



Study Area

Zoning

- R-A: Residential Acreage
- R-1: One-Family Residential District
- R-1 PRO: R-1 With Planned Rezone Overlay (PRO)
- R-2: One-Family Residential District
- R-3: One-Family Residential District
- R-4: One-Family Residential District
- RT PRO: Two-Family Residential District With PRO
- RM-1: Low-Density Multiple Family
- RM-2: High-Density Multiple Family
- RM-2 PRO: RM-2 with Planned Rezone Overlay
- MH: Mobile Home District
- B-1: Local Business District
- B-2: Community Business District
- B-3: General Business District
- C: Conference District
- EXO: OST District with EXO Overlay
- EXPO: EXPO District
- GE: Gateway East District
- FS: Freeway Service District
- I-1: Light Industrial District
- I-2: General Industrial District
- NCC: Non-Center Commercial District
- OS-1: Office Service District
- OS-2: Planned Office Service District
- OSC: Office Service Commercial
- OST: Office Service Technology
- RC: Regional Center District
- P-1: Vehicular Parking District
- TC: Town Center District
- TC-1: Town Center -1 District

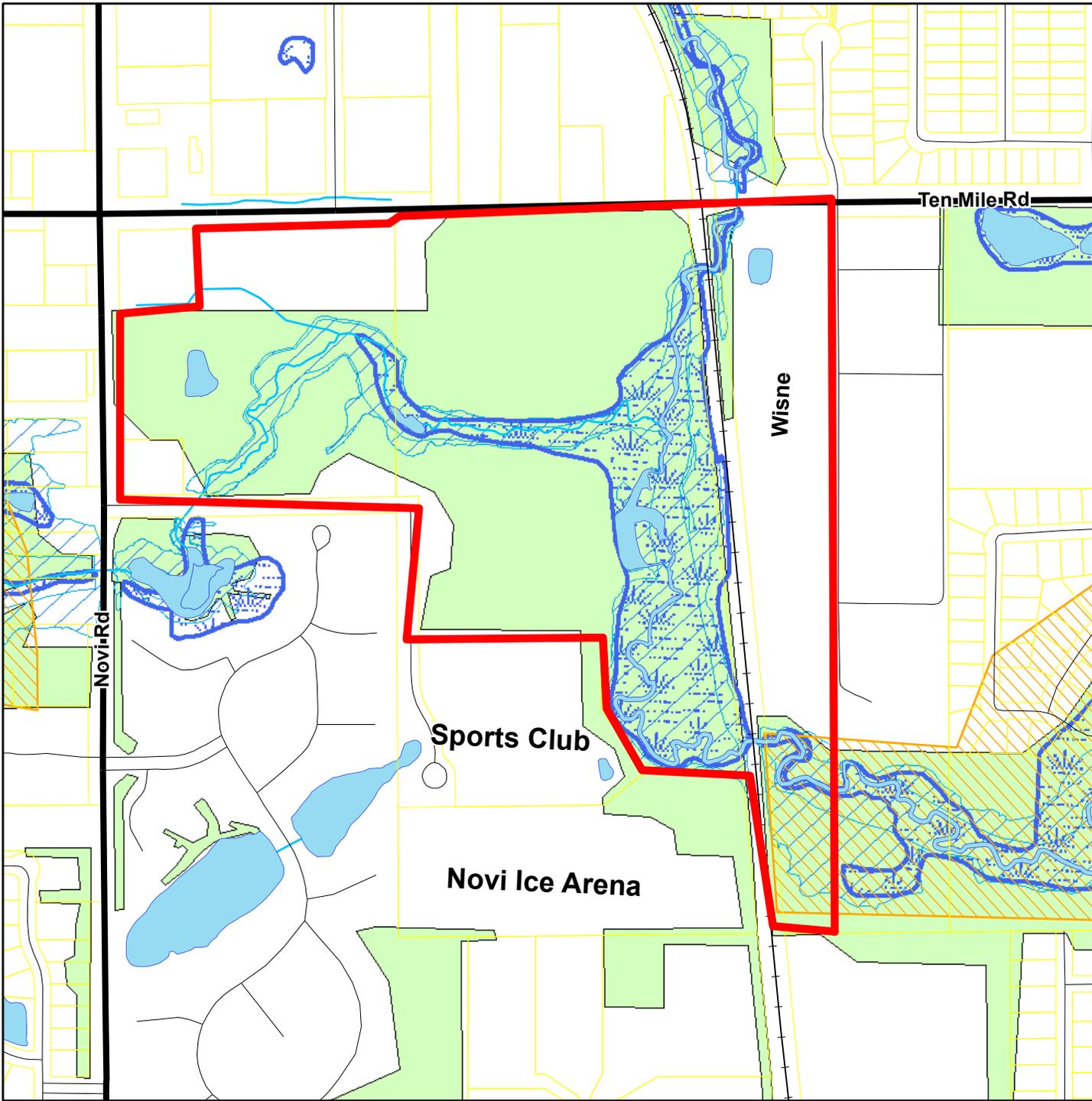


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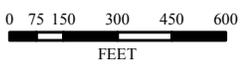
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Special Planning Project Area 1 Study Area Natural Features



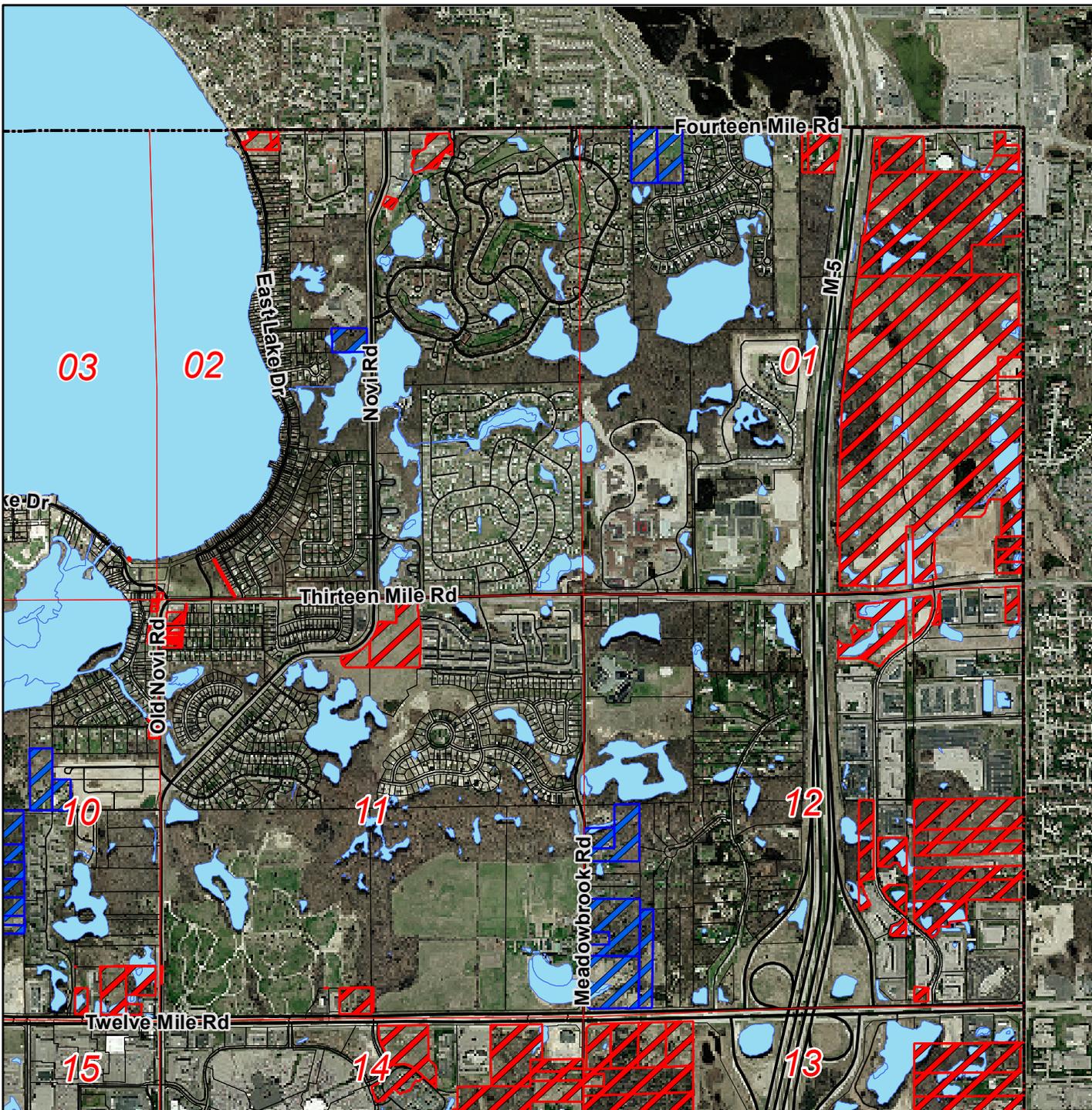
-  Study Area
 -  Habitat Priority Areas
 -  wetlands
 -  Woodlands 2009
- Flood Zones**
-  1.0% Chance Flood Zone A
 -  1.0% Chance Flood Zone AE



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Sec. 1, 2, 11 & 12 Air Photo & Development Parcels

Potential Development Parcels

-  Potential Commercial Development
-  Potential Residential Development
-  Tax Parcels

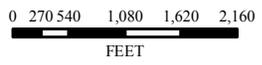
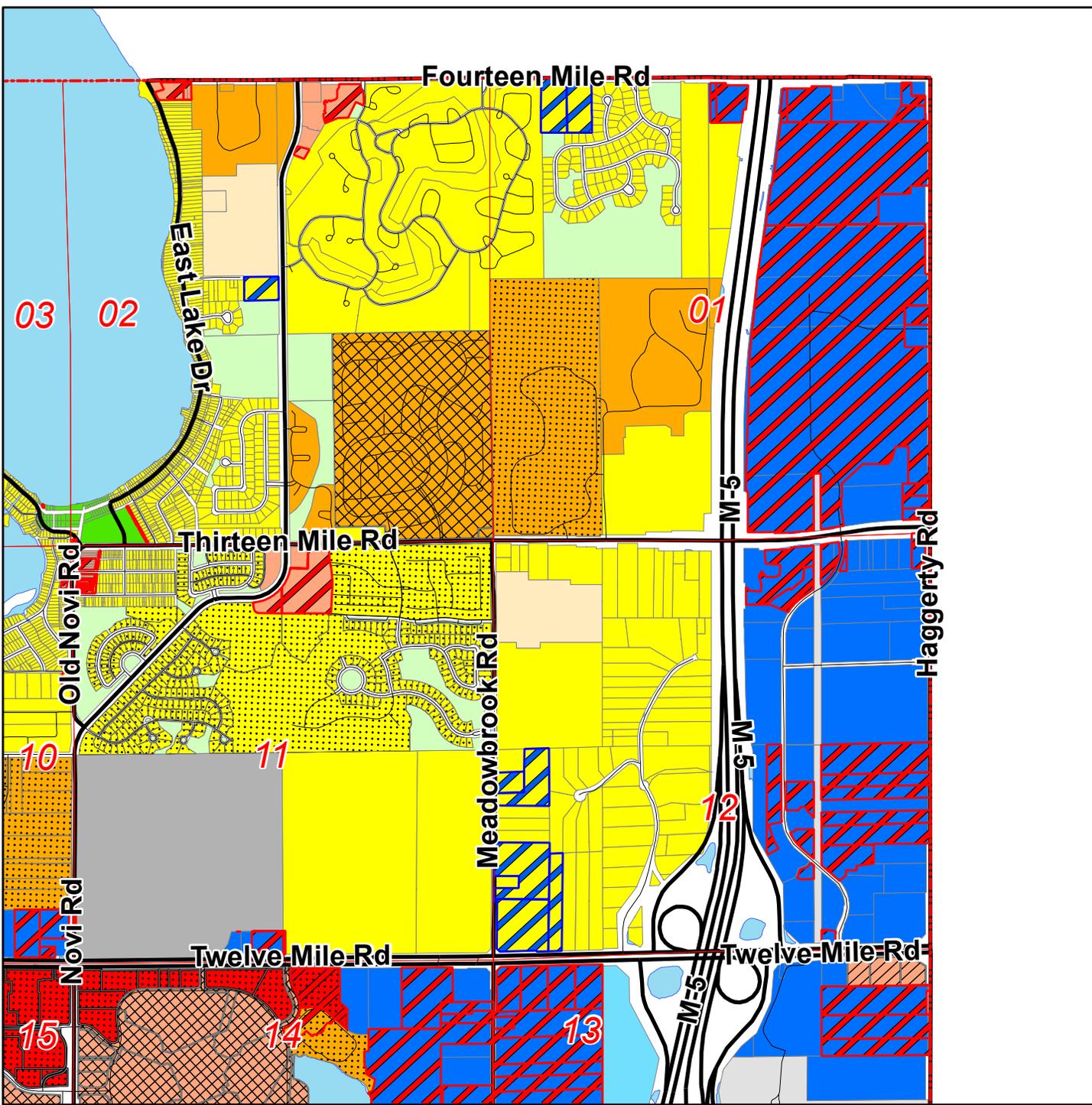


Sec. 1, 2, 11 & 12 Future Land Use & Potential Development Parcels

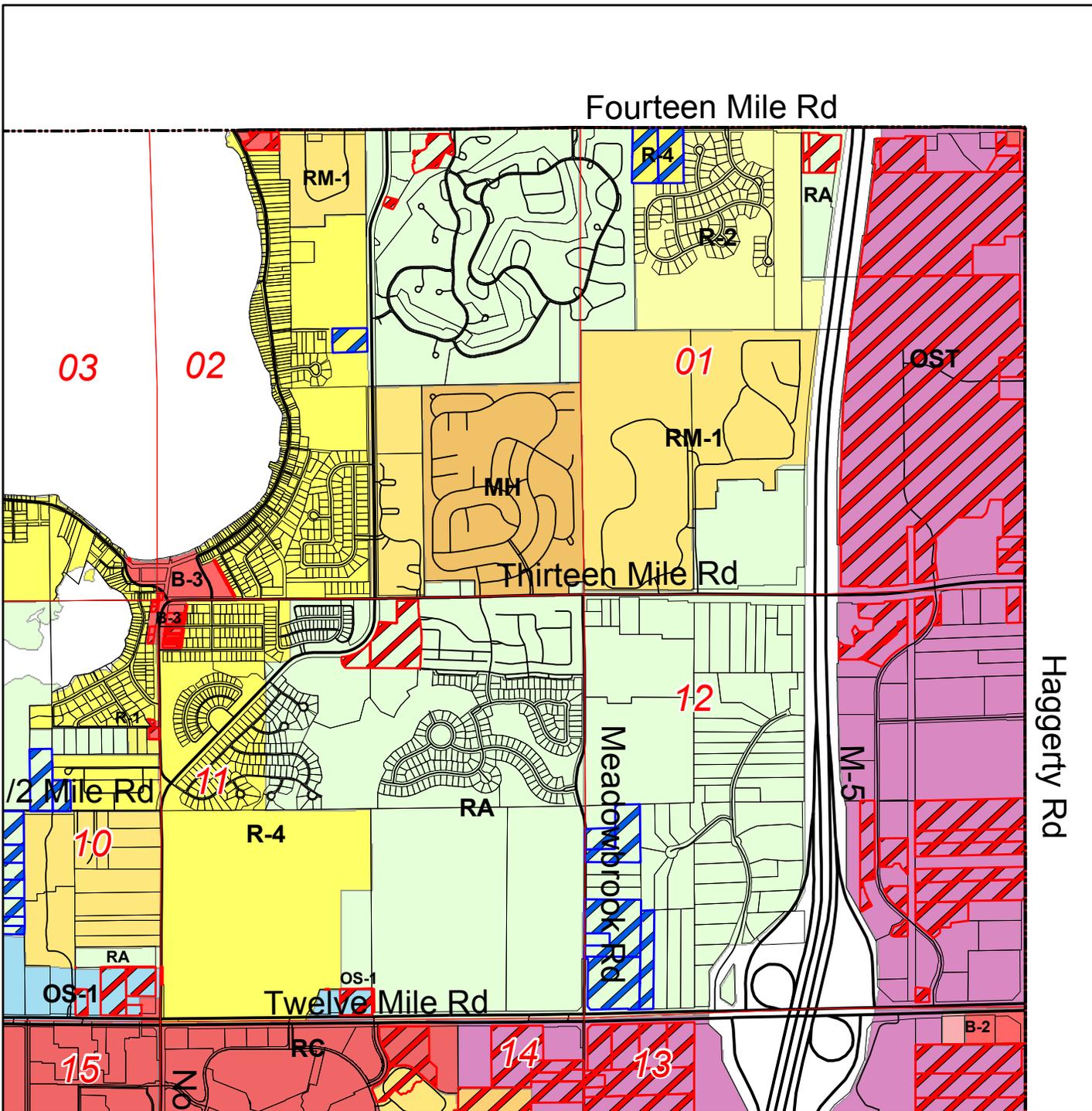
- Potential Development Parcels**
-  Potential Commercial Development
 -  Potential Residential Development

LAND USE CLASSIFICATION

-  SINGLE FAMILY
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-  MULTIPLE FAMILY
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-  MOBILE HOME PARK
-  OFFICE
-  LOCAL COMMERCIAL
-  COMMUNITY COMMERCIAL
-  REGIONAL COMMERCIAL
-  TC COMMERCIAL
-  TC GATEWAY
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-  HEAVY INDUSTRIAL
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-  CEMETERY
-  UTILITY



Sec. 1, 2, 11 & 12 Zoning & Potential Development Parcels



Potential Development Parcels

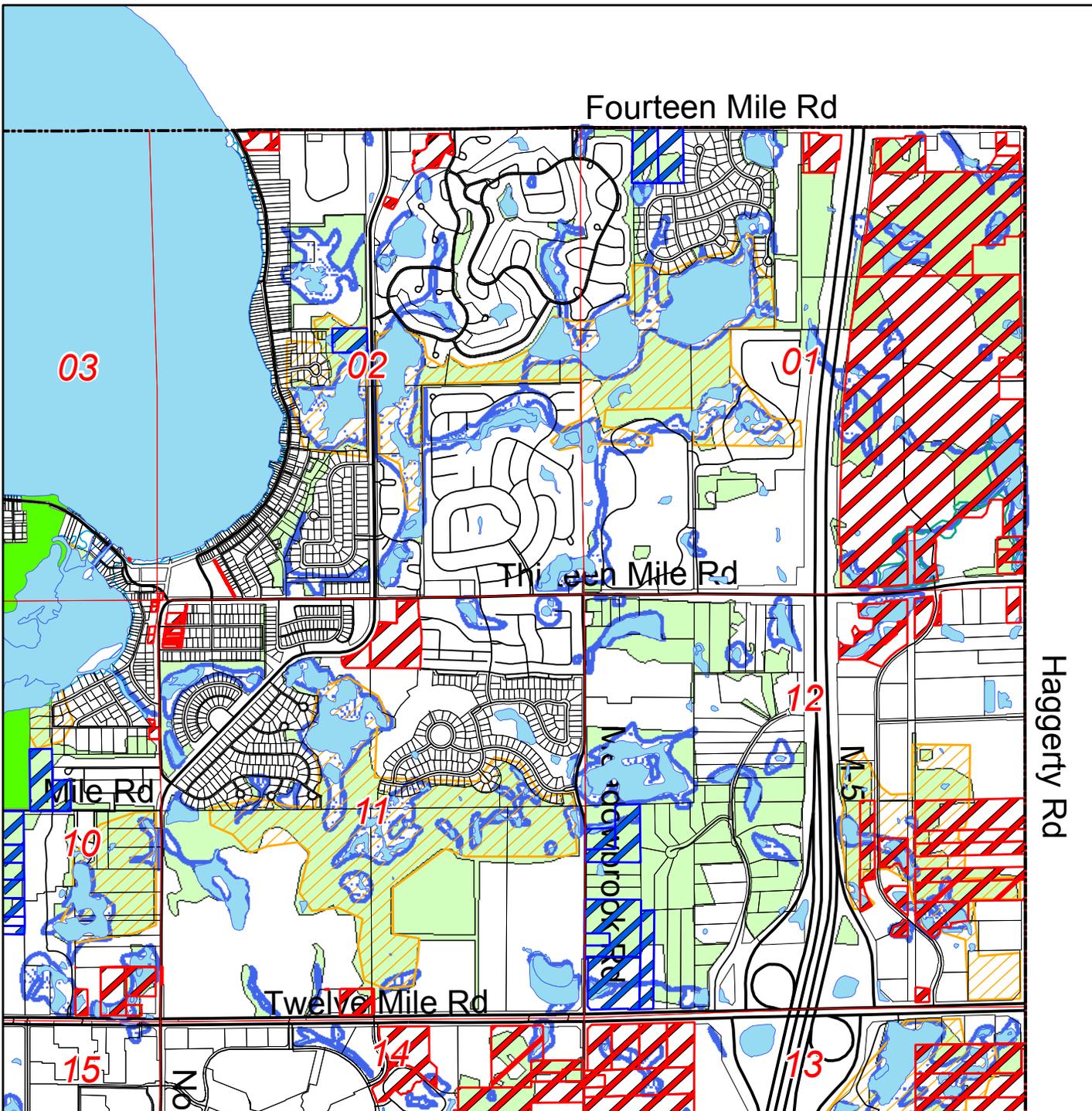
-  Potential Commercial Development
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Sec. 1, 2, 11 & 12 Woodlands, Wetlands, Flood Zones, Habitat Priority Areas & Potential Development Parcels



- Potential Development Parcels**
-  Potential Commercial Development
 -  Potential Residential Development
 -  Tax Parcels
 -  Habitat Priority Areas
- Flood Zones**
-  1.0% Chance Flood Zone A
 -  1.0% Chance Flood Zone AE
 -  wetlands
 -  WoodlandsUpdate

