EXECUTIVE SUMMARY

In September of 2016, the Central Midlands Council of Governments (CMCOG) initiated a study to examine the opportunities that a Regional Intermodal Transportation Center located in or around downtown Columbia would bring to the Central Midlands area. It was expected that such a facility not only would enhance the traveler experience and the efficiency of transportation service operators in Columbia, but also would attract transit oriented development (TOD). Such development would be attracted because of its transportation access advantages and would be supportive of the transportation services found at the Center. Opportunities for transit oriented design and joint development were examined in the study.

The purpose of this study was to look at what an Intermodal Transportation Center for Central Midlands might include, how it might serve various modes of transportation and impact development, and where it might be located. This study is a first step in the process set out by the Federal Transit Administration for advancing public transportation facility projects. Regarding when the project might happen, the actual design and construction of a Regional Intermodal Transportation Center is subject to future funding and approval by local, regional, state, and federal agencies. Depending on how aggressively approvals and funding are pursued and secured, the construction of a Regional Intermodal Transportation Center could occur in as few as two to three years or as late as five to ten years.

The study was directed by a Steering Committee made up of representatives from CMCOG, the City of Columbia, Richland County, and the Central Midlands Regional Transit Authority (CMRTA which runs the COMET bus system). The Steering Committee was chaired by CMCOG.

Additional stakeholders that were consulted during the study included elected and appointed officials from the City and CMRTA and representatives from the University of South Carolina, South Carolina Department of Transportation, Amtrak, Greyhound Bus Lines, and Megabus. To evaluate market demand and economic conditions, interviews were held with numerous local and regional real estate developers, brokers, economic development entities and civic/cultural representatives.

A proactive plan to obtain public input for the study was undertaken. A public information meeting was held and a free standing website was established for this study. The website included an overview of the plan, project documents and updates, meeting notices and reports and an email address for submitting comments. The public was able to contact the Wendel team through the website, ask questions, submit opinions and/or provide information. A public outreach questionnaire was posted on the website to solicit ideas, opinions and information relative to the project from the general public. This questionnaire also was made available to transit riders and people attending the public meetings. A separate questionnaire was used to solicit input from Amtrak and Greyhound riders.
The study was performed by a team of consultants led by Wendel and including Kimley-Horn & Associates for environmental analysis, Flock and Rally for public participation, Willdan Financial Services for economic benefits analysis, Jones Worley Design, Inc. for wayfinding signage recommendations and Costing Services Group for cost estimating. The study was undertaken in seven phases:

1. Analysis of Current Services, Operational Conditions And Needs
2. Facility Needs Assessment
3. Location and Site Evaluation
4. Public Involvement
5. Environmental Analysis
6. Markets and Opportunities Analysis
7. Conceptual Design

The findings of the study were as follows:

- The current transfer station operated by the COMET needs significant renovation and expansion in order to attract choice riders to COMET transit services.
- The current transfer station is heavily utilized and serves an important function for COMET services with 19 bus routes connecting at the facility and over 3,000 passengers using the station each day.
- Public opinion supports the creation of a new Regional Intermodal Transportation Center. Respondents to a public opinion questionnaire indicated that 75% believe that a new Intermodal Transportation Center is needed and 64% indicated that they were either very likely or likely to utilize a new Transportation Center.
- The COMET would like to be able to schedule more buses to arrive together for convenient passenger transfers than they currently are able to accommodate at the transfer station.
- The operators of Greyhound Bus service and Megabus service in Columbia would prefer to operate service from downtown and would welcome the opportunity to serve an Intermodal Transportation Center.
- Proximity to the Columbia Amtrak station is desirable for an Intermodal Transportation Center but direct physical connectivity is not essential. Current Amtrak service to Columbia operates at times considerably outside service hours of local and intercity bus service. New passenger rail service that could serve Columbia is being studied for the Southeast High Speed Rail Corridor, and there is interest in passenger rail service between Columbia and Charlotte, North Carolina. It has not been determined whether new passenger rail service under either scenario would operate from the current Columbia Amtrak Station. The South Carolina Department of Transportation (SCDOT) does not anticipate additional passenger rail service coming to Columbia in the near term (5 years).
- A new Intermodal Transportation Center for Columbia should be served by the COMET, Southeastern Stages and Greyhound, Megabus, other private intercity bus
carriers, possible bus links to Columbia Metropolitan Airport and Charlotte Douglas International Airport, Uber and/or Lyft type serviced, taxi service, and bike sharing service. The Center should have plentiful parking, and safe access for bicyclists and pedestrians, carpoolers, and people driving their own cars.

- A new Intermodal Transportation Center for Columbia functionally could support as many as 20 bus bays for COMET and intercity bus operations. The bus bays should be constructed in a saw tooth configuration for safe operations and the Center should have multiple points of bus ingress and egress to the facility.

- The Intermodal Transportation Center should include a building of approximately 12,000 square feet. The building should include a passenger waiting area, public restrooms, break rooms and facilities for COMET drivers, office space for certain COMET functions, employee and baggage handling rooms for Greyhound, and a space for public meetings.

- The Intermodal Transportation Center should be a modern, spacious facility and should have vending machines or food service carts, real-time bus information displays, ticketing machines, a lost and found, rest rooms and personal electronic device charging stations among other amenities. Safety and security will be of paramount importance at a new Transportation Center.

- The facility program that was developed for the Transportation Center indicates that a site with approximately 2.5 acres will be needed for a new facility.

- The study identified 22 potential sites for a new Transportation Center in the City of Columbia. These 22 locations were examined by the Study Steering Committee and using a pre-defined set of site evaluation criteria, the sites were analyzed and the highest ranking site was identified.

- An environmental analysis was performed for the top four ranking potential sites. No “fatal flaws” from an environmental perspective were found at any of the sites.

- The highest ranked, or preferred site was identified for further study. The preferred site was the location of the current COMET bus transfer station and would extend from Laurel Street to Blanding Street along Sumter Street.

- Late in the conduct of this study, the City of Columbia issued a Request for Qualifications for developers or development teams that would propose a public private partnership undertaking to develop portions of the 1700 and 1800 blocks of Main Street. The proposed development undertaking is to accompany a municipal complex being planned for the site and the development site would include the property which has been identified as the preferred site for the Regional Intermodal Transportation Center. The prospective developer(s) were to consider “intermodal transit opportunities” as part of the program for the development. The process for qualifying developer teams, soliciting and reviewing proposals and selecting a successful proposal is to extend beyond the timeline of this study. While the potential public private partnership could become the means to advance a regional intermodal transportation center, there is still much uncertainty at this early time in the development of that initiative. The decision was made by CMCOG not to alter the course of this study.
• Documentation was prepared that can be used to support a request to the Federal Transit Administration (FTA) for a Categorical Exclusion finding under the National Environmental Policy Act (NEPA). Such a finding will permit the project to advance to property acquisition and design/construction without further environmental analysis – if and when the project is selected for advancement by the CMRTA. In addition, a Title VI Equity Analysis was prepared for submission to the FTA. This analysis ensures compliance with FTA requirements that the location of the new Transportation Center meets the Title VI requirements and will not create adverse Civil Rights impacts.

• A conceptual site plan and conceptual architectural plan were developed for a Regional Intermodal Transportation Center. A base program site plan that shows the Transportation Center constructed to serve transportation purposes only is shown along with conceptual drawings of what the transportation center might look like with full build out of transportation oriented development on the site. The base program for the Center as shown in the conceptual site plan is expected to cost approximately $14.7M to construct.

• An analysis of the development potential at the site was prepared as well as an analysis of the economic impacts of the Regional Intermodal Transportation Center. This analysis determined that a total of 435,000 square feet of mixed-use development could accompany the development of the Regional Intermodal Transportation Center including 155 units of multifamily rental housing, 571 shared-use parking spaces and ancillary retail space to serve as an amenity to the Transportation Center.

• If the full development potential is realized then employment from ongoing residential and commercial operations is expected to generate nominal jobs (6 to 10 full-time equivalent (“FTE”) multifamily jobs, 16 FTE retail jobs, and between 40 to 80 office jobs. The total combined payroll from private sector jobs is approximately $5.35 million annually. The residential and commercial uses could be expected to generate approximately $6.42 million in direct, indirect and induced spending in the local and regional economy. Ongoing taxes related to the multifamily and commercial uses are expected to be nominal – the project is expected to generate approximately $26,000 in annual real property tax revenues and approximately $259,000 in state and local retail sales tax revenues.

In summary, the Regional Intermodal Transportation Center is a viable project for the Central Midlands Region. It has strong public support and would produce clear benefits for COMET operations and for Southeastern Stages and Greyhound as well as Megabus operations. Significant benefits would be produced for the patrons of the local and intercity bus operations as well as the Columbia community in general. A state of the art, attractive transportation center would provide safe and convenient access and connectivity to local bus, intercity bus and other modes of transportation for the citizens of Columbia and would support transit oriented mixed use development at the site of the center.

Next Steps – If the CMRTA and the City of Columbia concur that a Regional Intermodal Transportation Center would be beneficial to the COMET and concur with a selected site, this
project can be advanced towards implementation. Initial efforts would include working with CMCOG to place the project in the Regional Transportation Improvement Program and then with the South Carolina Department of Transportation to include the project in the Statewide Transportation Improvement Program. This is in accordance with the US Department of Transportation planning and programming guidelines and regulations. The CMRTA would then submit a request to the FTA for an evaluation of the project to determine its eligibility for a finding of a Categorical Exclusion (Cat Ex) from additional environmental study under the NEPA provisions. The information provided in the environmental analysis and equity analysis section of this study will support the Cat Ex request. The award of a Cat Ex finding by the FTA will permit the project to advance to the acquisition of property and final design stages of the project.

The CMRTA will need to seek federal and state funding support for the design and construction expenses of the Regional Intermodal Transportation Center. The information contained in this report will support the preparation of grant applications. Upon receiving federal and state funding for the project, the CMRTA – working closely with the City of Columbia will be the lead agency to acquire property, contract for the design of the facility, conduct construction bidding and oversee the construction and eventual operation of the Regional Intermodal Transportation Center.
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INTRODUCTION AND BACKGROUND

In September of 2016, the Central Midlands Council of Governments (CMCOG) initiated a study to examine the opportunities that a Regional Intermodal Transportation Center located in or around downtown Columbia would bring to the Central Midlands area. It was expected that such a facility would not only enhance the traveler experience and the efficiency of transportation service operators in Columbia, but also would attract development that would be drawn to the location because of its transportation advantages. Such development would be supportive of the transportation services found at the Center and opportunities for transit oriented design and joint development were examined in the study.

The purpose of this study was to look at what an Intermodal Transportation Center for Central Midlands might include, how it might serve various modes of transportation, how it might impact development, and where it might be located. This study is a first step in the process set out by the Federal Transit Administration for advancing public transportation facility projects. Regarding when the project might happen, the actual design and construction of a Regional Intermodal Transportation Center is subject to future funding and approval by local, regional, state, and federal agencies. Depending on how aggressively approvals and funding are pursued and secured, the construction of a Regional Intermodal Transportation Center could occur in as few as two to three years or as late as five to ten years.

The study was directed by a Steering Committee made up of representatives from CMCOG, the City of Columbia, Richland County, and the Central Midlands Regional Transit Authority (CMRTA which runs the COMET bus system). The Steering Committee was chaired by CMCOG.

What is an Intermodal Transportation Center? An Intermodal Transportation Center is a multi-purpose building located within a designated area of a city, in which several types of transportation come together to create a hub of accessible, connected transportation services. Depending on the modes of transportation that are in use in a region, the following may be brought together at a single location: local bus service, paratransit, intercity bus service, taxis, Ubers, rail connections, automobile parking, flex car or rental car service, bicycles, pedestrian walkways and more.

Bringing these modes of transportation together creates an opportunity for people to more easily travel and connect to destinations both near and far through a variety of transportation choices. Bringing these modes together also increases their efficiency and effectiveness and improves mobility and accessibility within the community.

In the building you will find comfortable passenger waiting areas, restrooms, ticketing and travel information – often including real-time information on the arrival and departure of buses. The building also may include many other features, such as storage areas for bicycles, coffee shops, bank branches, retail spaces, meeting rooms for community functions, administrative offices for the transit system and/or break areas for bus drivers. Intermodal Transportation Centers become activity centers for their community and usually attract other development around or nearby them.
Structure of the Study – The Central Midlands Regional Intermodal Transportation Center Feasibility Study was conducted to look at the feasibility of such a transportation facility in Columbia and included seven distinct elements. These include:

1. Analysis of Current Services, Operational Conditions And Needs
2. Facility Needs Assessment
3. Location and Site Evaluation
4. Public Involvement
5. Environmental Analysis
6. Markets and Opportunities Analysis
7. Conceptual Design

The following report sets out the findings of the Study for each of these elements.

ANALYSIS OF CURRENT SERVICES, OPERATIONAL CONDITIONS AND NEEDS

To start the analysis, sixteen planning documents were reviewed and pertinent data and/or information were noted as they pertained to this study. These planning documents included the following:

- CMRTA 2020 Vision Plan
- 2040 COATS Long Range Transportation Plan
- Regional Transit Development Plan
- CMCOG Human Services Coordination Plan
- CMCOG Congestion Management Plan
- City of Columbia Comprehensive Land Use Plan
- Richland County Comprehensive Land Use Plan
- Richland County Long Range Transportation Plan
- Lexington County Comprehensive Land Use Plan
- 2040 Multimodal Statewide Plan
- Walk Bike Columbia
- Imagine Mill District
- Amtrak Charlotte – Columbia Study
- Central Midlands Commuter Rail Feasibility Study
- South Carolina Statewide Rail Plan (2014)
- South Carolina Department of Transportation 2016 Rail Plan Implementation Update, January 2017
Transit Service Baseline

After reviewing the planning documents listed above, interviews were conducted with staff of the COMET and the Steering Committee to determine the current and future transit services that would serve a new Regional Intermodal Transportation Center. A summary of the transit service baseline information is as follows:

- Number, type and size of vehicles currently in operations and existing plans for service expansion
  - 37 buses are operated at peak service and 24 at off peak
  - The fleet includes cutaway buses, 35 foot buses and 40 foot buses. Articulated buses might be operated by the COMET in the future
  - The COMET carries approximately 8,000 riders per day – 3,000 of these riders use the current transfer facility
  - Plans for service expansion include 47 total routes with express routes and downtown circulator routes

- Number of staff anticipated to be located at hub
  - New center should accommodate up to 5 staff members

- Service routing and schedules
  - Centralized hub with pulse type service envisioned for the future – also transfers at future regional transfer centers
  - Service hours are from 5:30 am to 12:30 am

- Personnel and personnel requirements
  - Restroom facilities and lockers are needed for COMET employees
  - A functional workspace for a COMET Supervisor is needed

- Current operating procedures
  - Current facility is operated by the COMET
  - Preferred waiting time between buses is no more than 10 minutes
  - Private security services are employed at the facility

- Other Service Providers including intercity and/or interstate carriers
  - Megabus operates from the current facility
  - Greyhound and China Bus (Wanda Coach) operate at different locations

- Transit Oriented Development (TOD)
  - Desired around transportation center

- Other modes of transportation including bike, pedestrian, personal vehicle
  - Taxi service, Uber/Lyft service and bicycles are very active in Columbia
  - COMET buses are equipped with bike racks holding 3 bikes on large buses and 2 bikes on cutaways
  - Safe pedestrian access is essential

- Other City Functions
Central Midlands Regional Intermodal Transportation Center Feasibility Study

- No other City functions operate at the current facility

**Amtrak/Greyhound/Megabus**

In parallel with a survey of the public and COMET riders, a survey was conducted with patrons of Amtrak and Greyhound to understand their needs, desires, and other information that pertains to a new Intermodal Facility. In addition, the station managers for Amtrak and Greyhound were interviewed to ascertain their interest or concerns regarding a new Intermodal Facility. The regional manager for Megabus also was contacted for input to the study.

**Amtrak** - Amtrak currently operates two trains per day that serve Columbia. These trains operate on their Silver Star route that connects with Tampa and Miami, Florida in the south and all of the cities in the Northeast Corridor in the north terminating in New York City. The local Amtrak station is located at 850 Pulaski Street in Columbia. A southbound train departs the station at 1:43 am and a northbound train departs the station at 4:01 am. Amtrak sees around 38,000 boardings and alightings per year in Columbia. This is the third highest in the state behind Charleston with around 85,000 and Florence with around 52,000.

An interview with the station manager for Amtrak indicated that there are no current plans to expand or improve the station. Further, Amtrak does not have any plans to alter passenger rail service to the Columbia station. The station manager indicated that the concept of connectivity between the Amtrak station and other modes of transportation was logical and attractive – however the current schedule of passenger rail service makes the concept impractical. With the exception of Uber/Lyft and taxi service, other modes of public transportation in the Central Midlands region do not operate at the hours that the trains serve the station.

A survey of rail passengers at the Columbia Amtrak station was conducted to ascertain the interests or concerns of current Amtrak patrons in Columbia. The results of this survey are shown in Table 4 included in the Public Involvement section of this report.

**Greyhound** – Intercity bus service for Columbia is operated by Southeastern Stages for Greyhound Bus Lines. The intercity bus station is located at 710 Buckner Road in Columbia. Buses leave the station 11 times a day to connecting to destinations all over the east coast. The station is open from 12:00 am to 2:30 am and then from 6:30 am until 11:59 pm.

An interview with the station manager revealed that there is great interest in moving the intercity bus station back to downtown Columbia. Operating out of an intermodal transportation center is highly desirable for the intercity bus operator and strong support for this study and the establishment of a Regional Intermodal Transportation Center was expressed by the intercity bus operator.
A survey of intercity bus passengers at the Greyhound Bus station was conducted to ascertain the interests or concerns of current intercity bus patrons in Columbia. The results of this survey are shown in Table 4 included in the Public Involvement section of this report.

**Megabus** – Megabus operates four trips daily out of Columbia serving Atlanta, Georgia, Durham and Fayetteville, North Carolina, Richmond, Virginia, Washington, D.C., Philadelphia, Pennsylvania, and New York City, New York. The buses depart from Columbia at 3:00 am, 3:35 am, 2:00 pm, and 5:25 pm. Previously, Megabus operated out of the COMET transfer center on Sumter Street. Effective Monday April 3rd, 2017, the Megabus stop for arrivals and departures in Columbia relocated to the parking lot between McDonalds and the Wells Fargo Bank, at 1278 Dutch Square Blvd., near the intersection of Broad River Rd. The regional manager for Megabus was contacted by the Wendel team to discuss the planned Regional Intermodal Transportation Center. Megabus was supportive of this study and expressed interest in serving a new, safe and attractive regional transportation center.

**Future Passenger Rail Service to Columbia**

The City of Columbia serves as a hub to a network of rail lines owned by both Norfolk Southern Railway and CSX Transportation. Amtrak service to Columbia is operated over the rail lines owned by CSX Transportation. Perhaps because of Columbia’s history as a railroad hub, there has been and continues to be great interest in new or expanded passenger rail service to the City. Any new passenger rail service to Columbia most likely would come either as an initiative to construct high speed rail in the Southeastern United States or as an initiative to establish commuter rail to Charlotte, North Carolina. There have been and continue to be studies conducted to examine bring new passenger rail service to Columbia.

**High Speed Rail** – Georgia DOT, in partnership with South Carolina DOT and North Carolina DOT, are leading development of a Tier I Environmental Impact Study (EIS) for a high speed rail corridor between Charlotte and Atlanta that passes through the state’s Upstate region roughly parallel to I-85. This Passenger Rail Corridor Investment Plan (PRCIP) is part of a larger high-speed rail initiative on the behalf of the Federal Railroad Administration (FRA) that extends north to Washington, DC and is commonly referred to as the Southeast High Speed Rail (SEHSR) Corridor.

The purpose of the Atlanta to Charlotte PRCIP is to improve intercity travel and mobility between Atlanta and Charlotte by expanding the region’s transportation capacity and reliable mode choices through improvements in passenger rail services. This corridor also will be an important extension to the planned SEHSR Corridor system developing important linkages to other metropolitan areas along the East Coast (Washington, D.C., New York and Boston).

Two of the alignments being evaluated in the Charlotte to Atlanta PRCIP study connect Charlotte, NC with Columbia. One proposed alignment follows an existing CSX freight line, while the other is a Greenfield alignment roughly parallel to I-77. The Atlanta to Charlotte
Passenger Rail Corridor Investment Plan is 85% completed with full completion anticipated in early 2018.

Also related to the Charlotte to Atlanta PRCIP, FRA selected the Southeast region for a fully-funded, USDOT-led, Southeast Multi-State Rail Planning Study in July 2015. This effort continues and will facilitate coordination with neighboring states and will assist with funding for freight and passenger rail projects in the Southeast. SCDOT serves as a member of the project Steering Committee, and hosted the first meeting for the Southeast Regional Rail Planning Study in Columbia in September 2016. The anticipated completion date for the Plan is late 2017.

Independent of the studies to determine whether high-speed rail service will be feasible, interest has been expressed in passenger rail service between Charlotte, North Carolina and Columbia that would connect to the expanding passenger rail network being developed in the Charlotte region.

**Commuter Rail** - The Central Midland Council of Governments (CMCOG) has been exploring commuter rail service since 2000 when it completed its first study. The results of that study, which assessed nine corridors, identified three that possessed characteristics that would benefit from commuter rail service. They were: Columbia to Newberry; Columbia to Camden; and, Columbia to Batesburg-Leesville.

Another Commuter Rail Feasibility Study was conducted in 2006 by CMCOG to further evaluate the three corridors previously identified. Of the three corridors, the Columbia-Camden corridor was the clear choice receiving the highest ranking overall in four of the five criteria. It also compared favorably with the peer corridors in Albuquerque, Charlotte and Nashville. Ridership was estimated to range between 1,900-2,300 per day and the capital cost estimated at $80 million.

As a follow-up to the 2006 Commuter Rail Feasibility Study, in May of 2011, CMCOG completed its Camden / Columbia Alternatives Analysis Study. Three “build” alternatives were identified: one commuter rail and two bus rapid transit (BRT). Ultimately, however, the study found that the three build alternatives were too costly relative to the need for transit service at the time. Instead, low cost investments enhancing mobility options for traveling within Columbia were recommended, as well as between suburban areas and downtown Columbia.

**Challenges for New or Expanded Passenger Rail Service to Columbia** – If any new or expanded passenger rail service is to occur for Columbia, it will be up to the State of South Carolina to make it happen. The Federal Railroad Administration and Amtrak look to the states to plan, organize and finance passenger rail improvements. Federal funding for rail passenger improvements has been made available in the past and may become available again in the future, but the vast majority of the financial burden for passenger rail improvements in South Carolina will rest on the state.
The South Carolina Department of Transportation (SCDOT) is South Carolina’s “State Rail Transportation Authority” as defined by the federal Passenger Rail Investment and Improvement Act of 2008 (PRIIA). The South Carolina Statewide Rail Plan (SRP) was approved by the SCDOT Commission as part of the South Carolina Multimodal Transportation Plan on December 4, 2014. SCDOT ensures that the SRP documents the state’s policy on freight and passenger rail transportation within the State’s boundaries, establishes priorities and implementation strategies to enhance rail service in the public interest, and serves as the basis for Federal and State rail investment. The SRP was approved by the Federal Railroad Administration (FRA) on April 13, 2015. SCDOT continues to work on implementation of the SRP to enhance the overall passenger and freight rail services in South Carolina.

South Carolina currently does not have any state revenue source dedicated for passenger or freight rail, nor any grant or loan programs for rail projects. The state does have public-private partnership (P3) legislation for highway projects; however, the current P3 law does not include either passenger or freight rail projects. State support for rail transportation currently exists only as some limited opportunities for state and local financial assistance for Class I and Short Line freight rail companies and passenger rail initiatives that include South Carolina Department of Commerce grants for infrastructure improvements tied to job creation and assistance from the South Carolina Transportation Infrastructure Bank.

Therefore the next steps or tasks that need to be achieved to bring new or expanded passenger rail service to Columbia include:

- The selection of one of the alignments that serve Columbia in the Charlotte to Atlanta PRCIP or a finding of feasibility in a separate Charlotte to Columbia passenger rail study.
- The conduct and approval by FRA of a Tier II Environmental Impact Study for an alignment serving Columbia.
- The establishment of a passenger rail operating and capital funding program by the State of South Carolina.
- The selection of passenger rail service to Columbia for state sponsorship by SCDOT among other statewide needs and priorities.
- The conduct of a patronage and scheduling study by the operating entity (Amtrak or other) or SCDOT.
- The negotiation of access and operating agreements by SCDOT with the host railroad and passenger rail operating entity (Amtrak or other).
- The funding and construction of freight rail improvements required by the host railroad.
- The funding and construction of passenger rail improvements and/or purchase of required equipment.
Multi-modal Opportunities

After reviewing the current services, operational conditions and needs of public transportation in the Central Midlands region, it is apparent that a Regional Intermodal Transportation Center would create an opportunity for significant improvement for several modes. The core need is for a new, improved and expanded transfer center for the COMET. The current facility is heavily utilized, undersized and in poor condition. Buses stop on Laurel and Sumter Streets and the mix of buses, automobiles and pedestrians is unsafe.

An intermodal transportation center in Columbia will present an opportunity to connect COMET operations with Greyhound and Megabus operations. Both intercity operators expressed an interest and willingness to serve transportation center. Such a connection will benefit both local bus and intercity bus operators by providing access to expanded markets. A direct connection between COMET services and Greyhound and Megabus services also will provide much better access to local and regional transportation services for the people of the Central Midlands Region.

Taxi service and Uber are very active in the Columbia area. Providing safe and convenient access for taxis and Uber operators to a transportation center where local and intercity bus services connect also will expand markets to the bus operators and provide improved connectivity to transportation services for area residents.

The regional plan for bicycle and pedestrian access, Walk Bike Columbia, “envisions and expanded and ADA – accessible network of transit, sidewalks, greenways, trails, and on-street bicycle connections linking people to jobs, schools, destinations, adjacent communities, and one another.” The plan goes on to state that “Walking, biking, and transit are an integral part of City projects, policies and programs and are perceived as routine, efficient, safe, and comfortable options for both transportation and recreation.” The regional intermodal transportation center must have excellent pedestrian and bicycle access and storage facilities for bicycles. Designed accordingly, the transportation center will serve as a key component of the Walk Bike Columbia initiative.

Discussions with the Steering Committee and transportation providers suggested little need other than taxi and Uber service to connect to Columbia Metropolitan Airport. However, interest was expressed in a bus connection between the regional intermodal transportation center and Charlotte Douglas International Airport in Charlotte, North Carolina. Such a service would be operated by a private provider such as Groome or a charter company and might be financially viable with the connectivity and customer amenities that would be available at the transportation center.

Connectivity to passenger rail service also is seen as an important feature of a regional intermodal transportation center for Central Midlands. The hours of Amtrak service to Columbia today make this more of a long term goal since only taxi service is operating when the trains currently arrive and depart. Future passenger rail plans could dictate a new location for a train station for Columbia since multiple service alignments currently are being
examined in state sponsored studies. It is not possible at this point in time to predict if a new station will be required and if so, where it might be located. That decision likely will rest largely with the host railroad and the operator of the new passenger rail service – influenced by the state and the City of Columbia. Therefore to plan a regional intermodal transportation center it is not possible to look for adjacency to future rail service for the intermodal transportation center. Instead, the ability to support efficient connectivity via a shuttle or circulator bus will be a goal for this study. It is likely that over the long term, the opportunities for expanded services will become increasingly important.

**FACILITY NEEDS ASSESSMENT**

**Facility Program**

Interviews were conducted with selected staff members of CMCOG and CMRTA including representatives of administration, operations and maintenance. A preliminary functional program was developed that was presented to the stakeholders in a Facility Program Charrette. The relevant information that was discussed included:

- Current and projected vehicle inventory of CMRTA, including use (current or future) of alternative fuels
- Prospective users of the facility (if any) in addition to CMRTA such as intercity or commuter bus operations, community transit, car sharing or bicycle programs
- Desirability to co-locate the passenger rail (Amtrak) with the RITC
- Daily administrative, operations and any maintenance functions that may be conducted at the facility
- Identification of sizes and square-foot area requirements for each functional and operational area that will be part of the facility
- Juxtaposition of key spaces to facilitate workflow, supervision, security and safety
- Identification of public space and access, including adjacent street network as well as the existing overhead utility lines present along the site boundaries
- Plans for future growth and expansion for the next 20 years
- Short term and long term parking needs for the facility
- City of Columbia or other (CMCOG) design requirements
- Applicable federal and state requirements
- Site requirements that included: ingress and egress; turning radii; road dimensions; pavement construction for all vehicles using the facility; parking areas; bus circulation zones; pedestrian requirements; universal accessibility requirements; and environmental impact of noise, lights, and drainage.
- Security zones from public to highly restrictive were discussed to help organize spaces in the facility
- New technologies and their appropriateness for inclusion in the facility

As the space program was developed, additional functional design criteria and standards also were reviewed. This information formed the basis for the subsequent conceptual “test-fits” as part of the site selection process.
The facility program that was developed called for a transportation center building of approximately 12,000 square feet. The total site requirements for the transportation center came to just under 2.5 acres. This number is an approximation of how much land prospective sites should offer in order to accommodate the facility envisioned by the Steering Committee. The facility program that was developed for the study is shown below in Table 1 over the next 2 pages.

<table>
<thead>
<tr>
<th>Facility Program</th>
<th>4'x8' Counter + 4'x8' Behind Counter + 4'x2' Back Counter</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>COM</td>
<td>-</td>
</tr>
<tr>
<td>COM</td>
<td>272</td>
</tr>
</tbody>
</table>

**CMCOG Regional Intermodal Transportation Center**

<table>
<thead>
<tr>
<th>CMC Regional Intermodal Transportation Center Space Program</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORG</strong></td>
</tr>
<tr>
<td>COM</td>
</tr>
<tr>
<td>COM</td>
</tr>
<tr>
<td>COM</td>
</tr>
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<td>COM</td>
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<tr>
<td>COM</td>
</tr>
<tr>
<td>GYH</td>
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<tr>
<td>GYH</td>
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<td>GYH</td>
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<tr>
<td>GYH</td>
</tr>
<tr>
<td>GYH</td>
</tr>
<tr>
<td>GYH</td>
</tr>
</tbody>
</table>

**SHARED FACILITIES**

| SH | Public Meeting Space | 1 | 1,200 | 1,200 | Could be exterior. Separate from transfer operations. |
| SH | ATM | 1 | 10 | 10 | |
| SH | Interview Room | 1 | 18 | 18 | 3'x6' room + 3'x6' standing area |
| SH | Public Announcement Board | 1 | 10 | 10 | 6'x2' |
| SH | Police Sub station | 1 | 300 | 300 | CCTV hookup |
| SH | Kids Play Room | 1 | 300 | 300 | |

**Subtotal**

<table>
<thead>
<tr>
<th>Program Key: CMCOG = Central Midlands Council of Governments; COM = the COMET; SH = Shared; GYH = Greyhound</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COMET FACILITIES</strong></td>
</tr>
<tr>
<td><strong>Total Intermodal Transportation Center Building Requirements:</strong> 11,749 Sq. Ft.</td>
</tr>
</tbody>
</table>

| **COMET FACILITIES** |
| **Total Intermodal Transportation Center Building Requirements:** 11,749 Sq. Ft. |

**CMCOG Regional Intermodal Transportation Center Space Program**

<p>| <strong>CHAR</strong> | <strong>AREAS</strong> | <strong>QUANTITY</strong> | <strong>SF</strong> | <strong>TOTAL SF</strong> | <strong>COMMENTS</strong> |
| COM | Interior Customer Waiting | 80 | 19 | 1,440 | 80 Seats |
| COM | Information Booth/Ticket Sales | 1 | 30 | 30 | |
| COM | Employee Work Area | 2 | 72 | 144 | 8'x6' counter + 8'x6' behind counter + 8'x2' back counter |</p>
<table>
<thead>
<tr>
<th>Code</th>
<th>AREAS</th>
<th>Quantity</th>
<th>SF</th>
<th>Total SF</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>FACILITY SITE REQUIREMENTS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COMET</td>
<td>COMET Bus Bays</td>
<td>15</td>
<td>3015</td>
<td>45,225</td>
<td>48' x 67' saw-tooth for 45' buses</td>
</tr>
<tr>
<td>1</td>
<td>COMET Bus Platform</td>
<td>15</td>
<td>938</td>
<td>5,640</td>
<td>8' x 67'</td>
</tr>
<tr>
<td>1</td>
<td>COMET Articulated Bus Bay</td>
<td>1</td>
<td>3015</td>
<td>3,015</td>
<td>45' x 67' saw-tooth</td>
</tr>
<tr>
<td>1</td>
<td>COMET Articulated Platform</td>
<td>1</td>
<td>608</td>
<td>608</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>COMET Quick Charge Bay</td>
<td>1</td>
<td>3015</td>
<td>3,015</td>
<td>45' x 67' saw-tooth for articulated bus</td>
</tr>
<tr>
<td>1</td>
<td>Bus Launder Area</td>
<td>2</td>
<td>550</td>
<td>1,100</td>
<td>11' x 50'</td>
</tr>
<tr>
<td>1</td>
<td>Paratransit</td>
<td>1</td>
<td>495</td>
<td>495</td>
<td>11' x 45'</td>
</tr>
<tr>
<td>1</td>
<td>VanPool/Uber</td>
<td>1</td>
<td>1640</td>
<td>1,640</td>
<td>4 spaces with 12' approach. Taxi stand on street</td>
</tr>
<tr>
<td>1</td>
<td>Employee Parking</td>
<td>5</td>
<td>102</td>
<td>810</td>
<td>8' x 16' spaces</td>
</tr>
<tr>
<td>1</td>
<td>Recycling</td>
<td>0</td>
<td>4</td>
<td>24</td>
<td>2' x 2</td>
</tr>
<tr>
<td>1</td>
<td>Trash cans</td>
<td>0</td>
<td>4</td>
<td>24</td>
<td>2' x 2, solar powered compactor</td>
</tr>
<tr>
<td>1</td>
<td>Bike Racks</td>
<td>1</td>
<td>24</td>
<td>72</td>
<td>3' x 8 square</td>
</tr>
<tr>
<td>1</td>
<td>Dumpster</td>
<td>1</td>
<td>60</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Emergency Generator</td>
<td>1</td>
<td>250</td>
<td>250</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Transformer</td>
<td>2</td>
<td>403</td>
<td>806</td>
<td>One for quick change</td>
</tr>
<tr>
<td>GYH</td>
<td>Greyhound Bus Bays</td>
<td>3</td>
<td>3015</td>
<td>9,045</td>
<td>45' x 67' saw-tooth for 45' buses</td>
</tr>
<tr>
<td>GYH</td>
<td>Greyhound Platform</td>
<td>1</td>
<td>330</td>
<td>1,090</td>
<td>8' x 67'</td>
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<tr>
<td>GYH</td>
<td>Greyhound Station Bus Bay</td>
<td>2</td>
<td>500</td>
<td>1,000</td>
<td>11' x 50'</td>
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<tr>
<td>GYH</td>
<td>Electronic ticket kiosk</td>
<td>1</td>
<td>15</td>
<td>15</td>
<td>3'x2' kiosk + 3x3' standing area</td>
</tr>
<tr>
<td>SH</td>
<td>Exterior Pay Phones</td>
<td>2</td>
<td>3</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>SH</td>
<td>Bike Storage Room</td>
<td>1</td>
<td>300</td>
<td>300</td>
<td></td>
</tr>
<tr>
<td>SH</td>
<td>Bike Tool Stand</td>
<td>1</td>
<td>30</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>SH</td>
<td>Hose Rack</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>Hose Storage</td>
</tr>
<tr>
<td>SH</td>
<td>Electronic ticket kiosk</td>
<td>1</td>
<td>18</td>
<td>18</td>
<td>3'x3' kiosk + 3x3' standing area</td>
</tr>
<tr>
<td>SH</td>
<td>Paper Route Information Stands</td>
<td>1</td>
<td>8</td>
<td>8</td>
<td>2' x 2</td>
</tr>
<tr>
<td></td>
<td><strong>Total COMET &amp; Shared Site Requirements</strong></td>
<td></td>
<td></td>
<td>13,600</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Subtotal</strong></td>
<td></td>
<td></td>
<td>76,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Site Dependent Development</strong></td>
<td></td>
<td></td>
<td>34,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total Site Requirements</strong></td>
<td></td>
<td></td>
<td>110,600</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Project Totals (Gross)</strong></td>
<td></td>
<td></td>
<td>11,749</td>
<td></td>
</tr>
</tbody>
</table>

Total Project Area Required: 167,613 SF or 2.46 Acres

Program Key: CMCOG = Central Midlands Council of Governments; COMET = the COMET; SH = Shared; GYH = Greyhound

Table 1: Regional Intermodal Transportation Center Facility Program
Based on the facility program, the Wendel Team prepared an example site plan for a facility with the characteristics set out by the Steering Committee. The example site plan assumed a rectangular parcel with potential ingress/egress access on all four sides. This configuration will allow the most compact placement of the building facility and bus slips and would require the least amount of land to accommodate the full facility program. The example site plan is shown below in Figure 1.

**Figure 1: Example Site Plan for the Regional Intermodal Transportation Center**

The example site plan served as a tool to use to begin the search for prospective sites in the Columbia area on which to locate the Regional Intermodal Transportation Center. It was not expected that a parcel or combination of parcels would be found to match the exact configuration of the example site plan. Rather the size, access points and general configuration of the example site plan were used as criteria to begin the search for possible locations for the Regional Intermodal Transportation Center.

**LOCATION AND SITE EVALUATION**

The identification, evaluation and selection of a preferred site for the Regional Intermodal Transportation Center was a principal goal of this study. To achieve this, a structured process...
was conducted that follows the guidelines set out by the Federal Transit Administration and complies with the National Environmental Policy Act (NEPA) regulations. The process consisted of four steps:

- The development of selection criteria for use in evaluating the potential sites
- The identification of an optimal geographic area or location for the facility
- The development of an inventory of potential sites for the facility
- The evaluation and ranking of the potential sites using the selection criteria

**Site Selection Criteria**

Prior to the discussion of any potential sites for the Regional Intermodal Transportation Center, the Steering Committee prepare a list of criteria to use in evaluating potential sites. These criteria represented the considerations that would be used to measure the suitability of each site and lead to the selection of the best suited or preferred site.

Eleven criteria were identified as listed below.

1. **Site Availability:**
   a. Each site will be reviewed for ownership by private and public entities. (Sites owned by public entities will score higher)
   b. Sites also will be reviewed to confirm if there are current tenants operating on the property and for existing valued site architecture.
   c. The site should not interfere with other proposed or future City or Economic Development projects.

2. **Site Size/Land Configuration:**
   a. Site topography meets minimum size and road access for the required facility program.
   b. Site is served by adequate utilities. (Water/Sewer/Storm sewer)

3. **Access:** (Pass/Fail requirement)
   a. Site must have a minimum of two ingress/egress points - one of each onto singular streets. (sites with access to two separate streets would score higher and sites with two access points to the same street score lower)
   b. The preferred site should facilitate buses, pedestrians bicycles, and other sustainable transportation modes (existing bike routes, sidewalks and signalization)

4. **Compatibility:** (Pass/Fail requirement)
   a. Sites will be reviewed to verify if the surrounding neighborhoods are compatible with a transit use.
   b. The cities master plan will be reviewed to verify a site is appropriate for consideration.
   c. Community context will be reviewed in the design of the facility.
   d. Sites should have appropriate zoning to accommodate the transportation center or should be appropriate for rezoning.
5. **Traffic Impact:**
   a. The preferred site should minimize impact on the surrounding area traffic through access points and adjacency to arterial streets. (Access to arterial streets would score high while access to collector and secondary streets would score lower)
   b. During the site evaluation, mitigation measures will be identified to minimize the traffic impact. Examples of mitigation may include removing on-street parking, signal coordination, conversion of one lane streets.
   c. Determine opportunity to upgrade surrounding streets to “Complete Streets”

6. **Relative Location:**
   a. Preferred Site Location should be near the center of current and future transit ridership activity.
   b. The preferred site should have good proximately to major activity centers

7. **Economic Development:**
   a. The site and design should promote economic development opportunities to improve the surrounding area and potential revenue generation for the facility.
   b. The preferred site should provide an attractive location and facility to stimulate Transit Oriented Development
   c. The preferred site and design should promote transit ridership

8. **Environmental:**
   a. The design will incorporate sustainable design (LEED) principles.
   b. Each site will be reviewed at a high level for all environmental concerns and other requirements identified in the NEPA process.
   c. The visual impact to existing historic resources will be an important component for the preferred site. Sites that are part of or immediately adjacent to historic resources will score lower than sites not in the Area of Potential Effect (APE)

9. **COMET Operations:**
   a. Preferred Site should have a minimum impact to operational costs for safety, security and deadhead (non-revenue) mileage for bus routes. (sites further from node of current operations would score lower)
   b. Site should be located within current service area of the Comet. (no site will be considered outside the service area)

10. **Inter-modality:**
    a. The site should accommodate and encourage multiple modes of transportation other than buses.
    b. Examples include a bike share program, sidewalk connectivity, and possible rail connection.
    c. Preferred should provide facilities for alternative transportation (electric charging stations)

11. **Intermodal Connectivity:**
    a. The extent to which the site connects to other modal networks such as intercity rail, bike lanes or bikeways, etc.

Two of the criteria developed by the Steering Committee, Access and Compatibility, were identified by the Committee as pass/fail criteria. This means that any site that did not
adequately address either of these measures of suitability were eliminated for further consideration.

After identifying the evaluation criteria to be used for site selection, the Steering Committee then determined how important each of the criteria would be to the evaluation. This was achieved by having each member of the Steering Committee assign points to the 9 criteria that were not identified as pass/fail requirements. Each committee member was asked to divide up a total of 100 points among the nine criteria by assigning the most points to what they considered to be most important criteria. The average number of points assigned by the committee members for each criteria was determined and this became a weighting factor for the criteria. The results of the criteria weighting by the Steering Committee are shown in the table below.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Assigned Weight</th>
<th>Relative Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Site Availability</td>
<td>11.14</td>
<td>5th (Tie)</td>
</tr>
<tr>
<td>2. Site Size/Land Config</td>
<td>14.00</td>
<td>1st (Tie)</td>
</tr>
<tr>
<td>3. Access</td>
<td>Pass/Fail</td>
<td></td>
</tr>
<tr>
<td>4. Compatibility</td>
<td>Pass/Fail</td>
<td></td>
</tr>
<tr>
<td>5. Traffic Impact</td>
<td>11.14</td>
<td>5th (Tie)</td>
</tr>
<tr>
<td>6. Relative Location</td>
<td>11.86</td>
<td>4th</td>
</tr>
<tr>
<td>7. Economic Development</td>
<td>9.29</td>
<td>7th</td>
</tr>
<tr>
<td>8. Environmental</td>
<td>7.57</td>
<td>9th</td>
</tr>
<tr>
<td>9. COMET Operations</td>
<td>14.00</td>
<td>1st (Tie)</td>
</tr>
<tr>
<td>10. Inter-Modality</td>
<td>12.00</td>
<td>3rd</td>
</tr>
<tr>
<td>11. Intermodal Connectivity</td>
<td>9.0</td>
<td>8th</td>
</tr>
</tbody>
</table>

Table 2: Site Evaluation Criteria Weightings and Rankings

Optimal Geographic Location

Based upon an examination of the current routes operated by CMRTA and the plans for future service, the multi-modal functionality anticipated for the RITC, the opportunity for economic development in the Columbia region and input from the Steering Committee, a generalized optimal geographic location for the RITC was identified. The Optimal Geographic Location was established as a target area to use for searching for potential sites – not as a limiting boundary. Sites suggested for consideration that were located outside the area would be considered and evaluated. The location identified was large enough to include multiple potential sites for the facility but refined enough to focus the location site evaluation phase of this project. It was expected that this effort could yield as few as 3-4 sites but as many as 12. Figure 2 shows the Optimal Geographic Location that was identified for the purpose of this study.
Inventory of Potential Sites

The development of an inventory of potential sites for the Transportation Center began with a discussion between the Wendel Team and members of the Steering Committee for the Study. In this discussion, the Steering Committee members were asked to offer suggestions of potential sites for the facility. The City of Columbia suggested a total of 11 potential sites for examination. The management team for the COMET suggested 5 additional sites for consideration. The Wendel Team conducted a tour of the Optimal Geographic Location area and examined the sites suggested by the City and the Comet. During this tour, 2 additional sites were identified for consideration by Wendel. An initial inventory of 18 sites was prepared for discussion at a meeting of the Steering Committee. During that meeting, 3 more sites were suggested by the Steering Committee and 1 additional site was suggested by the Wendel Team. This produced a list of 22 potential sites for the Steering Committee to run through an evaluation and ranking process. In coordination with the Steering Committee meeting, a separate public meeting was held for the study to receive public comments about a regional transportation center including suggested locations for the facility. Two additional sites were suggested at the public meeting. The two sites were reviewed and discussed by the Steering Committee but they were not found to have sufficient merit to be added to the list for
Evaluation and ranking. Figure 3 shows the locations of the 22 sites that were evaluated by the Steering Committee.

Figure 3: Sites Evaluated for the Location of the Regional Transportation Center

Evaluations of Potential Sites

Each of the potential sites identified for the Intermodal Center was reviewed and discussed by the Steering Committee. The Steering Committee first examined each site using the two pass/fail criteria. Any site that was determined to fail either of these two criteria was dropped from further consideration and evaluation. All sites that were determined to pass these two criteria were advanced for further evaluation. Then working collectively, the Steering Committee assigned a score to each site for every one of the nine evaluation criteria that were not designated as pass/fail criteria. A value between zero (0) and four (4.0) was awarded to
each of the criteria using half point increments (0, 0.5, 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, and 4.0). If a site was a poor match for the criteria, a value of zero was assigned. If a site was an excellent match for the criteria, a value of four was assigned. These scores then were entered onto a spreadsheet and the weightings for each of the selection criteria were applied to produce a weighted score for each of the criteria. The weighted scores for the nine evaluation criteria were summed for each site and a total weighted score was calculated for each site. The sites then were ranked with the site that had the highest weighted score being ranked first and the site with the lowest ranked score being ranked last.

The spreadsheet that was used by the Steering Committee for site evaluations is shown below in Table 3. The top 4 sites were identified from the spreadsheet based on the highest weighted score and then discussed by the Steering Committee. The Steering Committee agreed with the quantitative findings and validated the selection of the preferred site and the next three highest ranking sites.

All four top ranked sites were advanced for environmental analysis. Four sites were evaluated to ensure that an acceptable site will be found in the event that environmental issues were discovered among any of the top ranked sites.

Table 3 shows the values awarded to the top 4 ranked sites under each of the eleven evaluation criteria. The total weighted score for a site is calculated as follows:

\[
\text{Total Weighted Score} = \text{Sum} ((\text{Site Score for Criteria 1} \times \text{Weight of Criteria 1}) + (\text{Site Score for Criteria 2} \times \text{Weight of Criteria 2}) + \ldots (\text{Site Score for Criteria 11} \times \text{Weight of Criteria 11})).
\]

The highest score that a site could achieve with an excellent (4.0 value) score for all criteria was 369.71.
### Central Midlands Regional Transportation Center Site Selection - Sites Evaluated

**Scoring:** 0 = poor; 1 = fair; 2 = good; 3 = very good; 4 = excellent

#### Scoring of Top Four Sites

<table>
<thead>
<tr>
<th>Weight</th>
<th>Site Evaluation Criteria</th>
<th>SITE 4 - LAUREL &amp; SUMTER</th>
<th>SITE 21 - MAIN &amp; ANTHONY</th>
<th>SITE 22 - MAIN &amp; SCOTT</th>
<th>SITE 14 - TAYLOR &amp; HARDEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.14</td>
<td>SITE AVAILABILITY</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>14.00</td>
<td>SITE SIZE/LAND CONFIGURATION</td>
<td>2 acres</td>
<td>6.4 acres</td>
<td>5.2 acres</td>
<td>3.5 acres</td>
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<tr>
<td>0.00</td>
<td>ACCESS</td>
<td>PASS</td>
<td>PASS</td>
<td>PASS</td>
<td>PASS</td>
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<td>11.14</td>
<td>TRAFFIC IMPACT</td>
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<td>11.86</td>
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<td>14.00</td>
<td>COMMUTATION</td>
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<td>INTER-MODALITY</td>
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<td></td>
</tr>
<tr>
<td>9.00</td>
<td>INTERMODAL CONNECTIVITY</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Table 3: Site Evaluation Criteria Spreadsheet – Scoring of Top Four Sites
The top ranked site and preferred location for the Regional Intermodal Transportation Center was Site 4 – Laurel Street and Sumter Street. This site extends along Sumter Street from Laurel Street to Blanding Street. This is the location of the current transfer center for the COMET and includes the property already owned by the CMRTA. There are 4 other parcels on this site – two of which are owned by the City. This site was rated as very good for site availability since 3 of the 5 parcels are already publicly owned. The size and rectangular shape of the combined parcels and the flat topography resulted in an excellent rating for site size and land configuration. All of the other 4 parcels are used for parking, and therefore would not require the relocation of any business or residence. This plus the fact that the COMET bus routes already serve the site and therefore no new noise or air quality impacts would result produced an excellent rating for this site for environmental concerns. Traffic impacts of locating the Intermodal Transportation Center on this site would be minimal since the COMET buses already meet at this site for transfers and therefore this site was found to be excellent for traffic impacts. This site would serve existing COMET operations best since it is the location of the existing transfer station and therefore it would not require any significant changes to current bus routes. This site was rated as excellent for COMET operations. This site was awarded a weighted score of 343.21 – a full 50 points higher than the second ranked site. The weighted score was 93% of the maximum possible score indicating that the selected site comes very close to excelling under all of the evaluation criteria.

PUBLIC INVOLVEMENT

At the very start of the Regional Intermodal Transportation Center Feasibility Study, a plan for public involvement was developed by the Steering Committee and initiated by Flock and Rally, the sub-consultant responsible for this task. The Wendel Team initiated a proactive plan for notifying and involving interested parties including current rail and public transportation users, community businesses or individuals, city officials, and others to ensure a representative sample of affected persons who will know about and be afforded the opportunity to provide input for the study.

A study Stakeholder list was developed that included 85 groups that were targeted with information about the study and invited to provide input to the study. The types of groups on the list included:

- Environmental/Preservation/Progressive Non-Profit Organizations
- Local and Regional Governments
- Transportation Operators
- Merchants Associations and Business Groups
- Chambers of Commerce
Additional stakeholders that were consulted during the study included elected and appointed officials from the City and CMRTA and representatives from the University of South Carolina, South Carolina Department of Transportation, Amtrak, Greyhound Bus Lines, and Megabus. To evaluate market demand and economic conditions, interviews were held with numerous local and regional real estate developers, brokers, economic development entities and civic/cultural representatives.

A project information sheet was prepared and sent out to the stakeholders to explain the project and to generate interest in the study. The information sheet is shown below in Figure 4 over the next 2 pages.
FAQ: Central Midlands Council of Government (CMCOG) Regional Intermodal Transportation Center

Q: What is an Intermodal Transportation Center?
A: An Intermodal Transportation Center is a multi-purpose building located within a designated area of a city, in which several types of transportation come together to create a hub of accessible, connected transportation.

Q: What areas or regions might the Regional Intermodal Transportation Center cover?
A: Much like the MARTA in Atlanta and CATS in Charlotte, Columbia’s center will combine several transportation modes radiating from one location to several other locations across the city of Columbia, S.C. – as well as the region, with modes potentially reaching as far as New York.

Q: What types of transportation modes are connected in an Intermodal Transportation Center?
A: Depending on the modes of transportation that are in use in a region, the following may be brought together at a single location: local bus service, paratransit, intercity bus service, taxis, Uber service, rail connections, automobile parking, flex car or rental car service, bicycles, pedestrian walkways and more.

Q: What amenities come with an Intermodal Transportation Center?
A: In an Intermodal Transportation Center, travelers will find comfortable passenger waiting areas, restrooms, vending machines, and ticketing and travel information – often including real-time information on the arrival and departure of buses. The center may also include many other spaces such as storage areas for bicycles, meeting rooms for community functions, administrative offices for the transit system, a small public library branch, a police substation, break areas for transit drivers, and retail spaces for the likes of coffee shops, bank branches, dry cleaners and more. Intermodal Transportation Centers become activity centers for their community and usually attract other development around or nearby them.

Q: What might the center look like?
A: There are several different layouts for Intermodal Transportation Centers. See examples at [http://www.midlandstransportationcenter.com/](http://www.midlandstransportationcenter.com/)

Q: How are we determining the specifics for the potential center?
A: Central Midlands Council of Government (CMCOG) is launching a feasibility study, taking place from October 2016-April 2017, to identify the following:
1) Viable locations for the center
2) What features and transportation modes the center might include
3) How the center might serve various modes of transportation and impact development

This is only a first step in the process set out by the Federal Transit Administration for advancing public transportation facility projects.
Figure 4: Project Information Sheet

A free standing website was established for this study at midlandstransportationcenter.com. The Wendel team worked with the webmasters for both CMCOG and CMRTA to coordinate a webpage on the study with links to relevant study documents. The website included an overview of the plan, project documents and updates, meeting notices and reports and an email address for submitting comments. The public was able to contact the Wendel team through the website, ask questions, submit opinions and/or provide information.
A public outreach questionnaire was posted on the website to solicit ideas, opinions and information relative to the project from the general public.

In addition to the website, a Facebook post was set up to notify interested parties about the project and to provide another means to ask questions, express opinions and to obtain information. The Facebook post also was used to notify people about the public meeting that was held for the project. The Facebook post is shown below in Figure 6.
What is the feasibility of a regional transportation center in the Midlands? Be a part of the conversation at a public meeting on Wed., October 5, 2016, 6-8 p.m. at the @Richland Library, 1431 Assembly St., Columbia, S.C. 29201.

**Figure 6: Facebook Post**

**Public Meeting**

A public meeting was held early in the project to let people know about the vision for a regional intermodal transportation center and to obtain their input about the project. The meeting originally was scheduled for October 5, 2016 from six to eight in the evening and was to be held at the Richland Library on Assembly Street in the City of Columbia. The arrival of a hurricane on that date forced a postponement of the meeting to November 2, 2016 from five until seven in the evening at the same location. Notifications about the meeting were placed in newspapers and were sent out to stakeholders. In addition, posters were placed on the Comet buses and at the transfer center to let riders know about the meeting. A copy of the notification that was sent out is shown below in Figure 7 and the poster that was used is shown in Figure 8.
FOR IMMEDIATE RELEASE

Central Midlands Council of Governments requests public input for a Regional Intermodal Transportation Center study, October 5, 2016, 6–8 p.m. at Richland Library

Sept. 19, 2016 (COLUMBIA, S.C.) – The Central Midlands Council of Governments (CMCOG) will hold a public meeting to discuss possible locations for a Regional Intermodal Transportation Center in Columbia, S.C., that would serve the Midlands area, on Wednesday, Oct. 5, 2016 from 6:00–8:00 p.m. at Richland Library (Main Branch), located at 1431 Assembly St. in downtown Columbia, S.C.

CMCOG is working with a consultant on a site selection study, spanning October 2016 through April 2017, to identify viable locations for the center; features and transportation modes the center might include; and how the center might serve various modes of transportation and impact development.

The study is a first step in the process set out by the Federal Transit Administration for advancing public transportation facility projects. The meeting will be the first opportunity for the public to get involved.

Members of the public can attend the free, public meeting to learn more about Regional Intermodal Transportation Centers; see examples of other metropolitan cities’ transportation hubs; ask questions; and give feedback on the potential project. The meeting will be a drop-in format with representatives from CMCOG and its consultant to answer questions and receive comments.

An Intermodal Transportation Center is a building located within a designated area of a city in which several types of transportation modes come together to create a hub of accessible, connected transportation. Much like the MARTA in Atlanta and CATS in Charlotte — if proven feasible — Columbia’s center might combine several transportation modes radiating from one location to several other locations across the Midlands as well as the nation, with modes potentially reaching as far as New York.

It is expected that such a facility would enhance regional traveler experience and the efficiency of transportation service operators while attracting development to the immediate area. The timeline for completion of such a center is undetermined at this time but likely will span five or more years.

To learn more and give feedback, visit http://www.midlandstransportationcenter.com.

About Central Midlands Council of Government (CMCOG)
Since 1969, the Central Midlands Council of Governments (CMCOG) has been assisting local governments develop local and regional plans within the four Midlands counties (Fairfield, Lexington, Newberry, Richland) of South Carolina, as well as providing local governments with planning and technical support to improve the quality of life within the region. Learn more at www.centralmidlands.org.

###

Media Contacts: Chloe Rodgers, Flock and Rally, 843.230.1611, chloe@flockandrally.com
Tracie Broom, Flock and Rally, 415.235.5710, tracie@flockandrally.com

Figure 7: Public Meeting Notification
Consultant team staff, Comet staff and CMCOG staff all were present at the meeting to talk to people and answer questions about the project. Thirteen project boards were displayed that addressed the following topics:

- What is a Multi-modal Facility?
- Project Opportunity and Purpose
- Transportation Benefits
- Community Benefits
- The Preliminary Program for the Facility
- The Study Area Boundary
- Photos of the Existing Transfer Site
- Photos of Project Examples
- Current Progress of the Study
- Next Steps
A sample of one of the boards that was used to encourage public engagement at the meeting is shown below in Figure 9.

**Figure 9: Sample Public Meeting Information Board**

The meeting was well attended with over 100 participants. Each participant was met by a consultant team staff member, shown the boards and encouraged to ask questions and to fill out a public comment questionnaire. The media for Central Midlands was notified about the public meeting and both television and newspaper coverage of the meeting was provided. Members of the media contacted about the meeting included:

- Free Times: Eva Moore, Managing Editor
- The State: Eileen Waddell, Deputy Editor
- Columbia Star: Mimi Maddock
- WIS: Mark Little, News Director
- WLTX: Marybeth Jacoby, News Director
- WACH: Ryan Kitchell, Assignment Director
- ABC: Crysty Vaughan, News Director
Public Input Questionnaire

At the public meeting, participants were encouraged to complete a questionnaire. This questionnaire also was made available to transit riders and was posted on the project website.

The questionnaire included 19 questions and an area for general comments. The first 10 questions collected demographic information from the responders. This information allowed the reviewers to understand the age, ethnic mix, general income, and home/work locations of the responders. Collecting this information ensured that a cross section of the Central Midlands Community had been reached and was responding to the questionnaire.

The next five nine questions collected information about the current travel modes and the travel preferences of the responders. This information allowed the reviewers to know whether the responders were largely current transit riders, automobile drivers or shared ride users and how their current travel means compared to their preferred travel modes.

The final four questions asked responders questions about their ideas for a new Central Midlands Regional Intermodal Transportation Center. This provided the reviewers with information about what amenities people were interested in for the center and the level of interest in the project.

A separate, abbreviated version of the questionnaire was used by the consultant team to poll riders at the Columbia Amtrak station and the Greyhound Bus station. An abbreviated questionnaire was used to be less intrusive since passengers were waiting for trains or buses and they were asked the questions verbally.

The full questionnaire that was used on the website, on the buses, and at the public meeting is shown below in Figure 10 contained in the next four pages.
CMCOG Regional Transportation Center Study
Public Comment Questionnaire

The Central Midlands Council of Governments and the COMET welcome and value your participation and comments on this study.

Information about You

1. Male _____ Female _____

2. In which block of years were you born?
   a. 1945 or before (Silent or Greatest) _____
   b. 1946 – 1964 (Baby Boomers) _____
   c. 1965 – 1982 (Gen X) _____
   d. 1983 – 2001 (Millennials) _____
   e. After 2001 _____

3. Which of these do you consider yourself to be? (optional)
   a. White _____
   b. Black or African American _____
   c. Asian _____
   d. American Indian or Alaska Native _____
   e. Hispanic or Latino descent? Yes _____ No _____
   f. Other _____

4. What is your marital status?
   a. Married _____
   b. Single _____
   c. Divorced _____
   d. Widowed _____
   e. Separated _____
   f. Living with partner _____

5. Are there any children under the age of 18 who currently live in your household? Yes _____ No _____

6. What is your annual household income? (optional)
   a. $0 to $24,999 _____
   b. $25,000 to $49,999 _____
   c. $50,000 to $74,999 _____
   d. $75,000 to $99,999 _____
   e. $100,000 to $124,999 _____
   f. $125,000 or higher _____

7. Where do you live?
   a. Fairfield County _____
   b. Lexington County _____
   c. Newberry County _____
   d. Richland County _____
   e. City of Columbia _____
   f. Fort Jackson _____
   g. Not Applicable _____

Figure 10: Public Comment Questionnaire
8. How long have you lived in the Central Midlands Region? (Defined as the jurisdictions listed in prior question)
   a. 2 years or less ______
   b. 3 to 5 years ______
   c. 6 to 10 years ______
   d. 11 to 15 years ______
   e. 16 to 20 years ______
   f. More than 20 years ______
   g. Not Applicable ______

9. Where do you work or go to school?
   a. Fairfield County ______
   b. Lexington County ______
   c. Newberry County ______
   d. Richland County ______
   e. City of Columbia ______
   f. Fort Jackson ______
   g. Not Applicable ______

10. What is your current employment status?
    a. Employed full-time ______
    b. Employed part-time ______
    c. Self-employed/Freelancer/Entrepreneur ______
    d. Work in the home/Stay-at-home ______
    e. Unemployed or temporarily laid off ______
    f. Retired ______
    g. Student ______
    h. Other ______

How You Travel

11. How do you USUALLY travel to downtown Columbia?
    a. I drive downtown ______
    b. I walk downtown ______
    c. I cycle downtown ______
    d. I ride the Comet downtown ______
    e. I take a taxi downtown ______
    f. I carpool or vanpool downtown ______
    g. I use Uber/Lyft to get downtown ______
    h. Other ______

12. How would you PREFER to travel to downtown Columbia?
    a. Drive downtown ______
    b. Walk downtown ______
    c. Cycle downtown ______
    d. Ride transit downtown ______
    e. Take a taxi downtown ______
    f. Carpool or vanpool downtown ______
    g. Use Uber/Lyft to get downtown ______
    h. Other ______
13. When thinking about downtown Columbia specifically, have you done any of the following in the past 12 months? Please select all that apply.
   a. Eat at a downtown restaurant
   b. Attended a special event or festival
   c. Traveled downtown for work or a meeting
   d. Walked or toured a museum or historic attraction
   e. Attended a concert or show at a downtown venue
   f. Shopped at a downtown retailer
   g. Attended a class at a school located downtown
   h. Did not travel downtown

14. Do you currently ride the Comet for some or all of your trips? Yes________ No________ If so, which route(s)?

15. Which of the following transportation modes have you used in the past two years – either within the region or traveling away from the Columbia area? Please select all that apply.
   a. Personal car
   b. Plane
   c. Amtrak train
   d. Bike
   e. Taxi
   f. Uber/Lyft
   g. The Comet
   h. Greyhound Bus
   i. Megabus
   j. Other

What You Would Like to See in a Regional Transportation Center

16. Which transportation services would you like to have access to from a regional transportation center? Please select all that apply.
   a. Personal car
   b. Plane
   c. Amtrak train
   d. Train to Charlotte
   e. Personal bike
   f. Bike Share
   g. Taxi
   h. Uber/Lyft
   i. The Comet
   j. Greyhound Bus
   k. Megabus
   l. Other
Amtrak and Greyhound Passengers Response

The survey of Amtrak riders was conducted at the Columbia Amtrak Station on Pulaski Street on 10/5/2016 at 1:30 am in the morning. There were eight passengers interviewed. The survey of the Greyhound passengers was conducted at the Southeastern Stages and Greyhound Station on Buckner Road in Columbia. The Greyhound survey was conducted on
October 5, 2016 at 9:30 in the morning. Twenty two passengers were interviewed. The results of the Amtrak and Greyhound surveys are shown in Table 4 below.

<table>
<thead>
<tr>
<th>Question</th>
<th>Amtrak Passenger Responses</th>
<th>Greyhound Passenger Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td>Male: 50%, Female 50%</td>
<td>Male: 45%, Female: 55%</td>
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<tr>
<td><strong>Year of Birth</strong></td>
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<td></td>
</tr>
<tr>
<td>1945 or Earlier</td>
<td>0%</td>
<td>1945 or Earlier</td>
</tr>
<tr>
<td>1946 - 1964</td>
<td>62%</td>
<td>1946 - 1964</td>
</tr>
<tr>
<td>1965 - 1982</td>
<td>25%</td>
<td>1965 - 1982</td>
</tr>
<tr>
<td>1983 - 2001</td>
<td>13%</td>
<td>1983 - 2001</td>
</tr>
<tr>
<td>After 2001</td>
<td>0%</td>
<td>After 2001</td>
</tr>
<tr>
<td><strong>Travel to the Station</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drive Myself</td>
<td>12%</td>
<td>Ride with Others</td>
</tr>
<tr>
<td>Ride with Others</td>
<td>63%</td>
<td>Taxi</td>
</tr>
<tr>
<td>Taxi</td>
<td>25%</td>
<td>Other (Uber)</td>
</tr>
<tr>
<td><strong>Travel from the Station</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drive Myself</td>
<td>12%</td>
<td>Ride with Others</td>
</tr>
<tr>
<td>Ride with Others</td>
<td>50%</td>
<td>Taxi</td>
</tr>
<tr>
<td>Taxi</td>
<td>38%</td>
<td>Bus</td>
</tr>
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<td>Other (Uber)</td>
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<td><strong>Desired Connectivity to the Station</strong></td>
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<tr>
<td>Personal Car</td>
<td>5 Respondents</td>
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</tr>
<tr>
<td>Plane</td>
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</tr>
<tr>
<td>Amtrak Train</td>
<td>3 Respondents</td>
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</tr>
<tr>
<td>Bike</td>
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<tr>
<td>Taxi</td>
<td>6 Respondents</td>
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<td>Uber/Lyft</td>
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<td>The Comet</td>
<td>4 Respondents</td>
<td>The Comet</td>
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<tr>
<td>Greyhound</td>
<td>1 Respondents</td>
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<tr>
<td>Megabus</td>
<td>1 Respondents</td>
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<td><strong>Importance of Station Amenities</strong></td>
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<td>Very Important:</td>
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<td>Public Restrooms</td>
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<td>Lost and Found</td>
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<td>Vending Machines</td>
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<td>Safe Environment</td>
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<td>Charging Stations</td>
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<td>Tourism Services</td>
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<tr>
<td>Pay Phones</td>
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<td>Pay Phones</td>
</tr>
</tbody>
</table>

Table 4: Amtrak and Greyhound Passenger Survey Responses
The results of these surveys show that currently, getting a ride with others or taking a taxi are the predominant means of travel to and from the Amtrak and Greyhound stations and that other modes of access are desired. The most important station amenities for current Amtrak and Greyhound passengers include a safe environment, public restrooms, a lost and found, real time travel information.

**Public Input Questionnaire Results**

The Public Input Questionnaire was used to collect information from Comet riders, people attending the public meeting and from people visiting the project website. There were 185 respondents. The questions asked and the responses received are shown in the graphs below over the next 14 pages in Figure 11.

1. Gender?

![Gender Pie Chart](image)
2. In which block of years were you born?

![Year of Birth Pie Chart]

3. Which of these do you consider yourself to be? (Optional)

![Ethnicity Pie Chart]
4. What is your marital status?

Marital Status

- 81, 44% married
- 70, 38% single
- 18, 10% divorced
- 11, 6% widowed
- 3, 1% separated
- 2, 1% living with partner

5. Are there any children under the age of 18 who currently live in your household?

Dependents

- 138, 75% yes
- 47, 25% no
6. What is your annual household income? (Optional)

![Household Income Pie Chart]

*Household Income Distribution*:
- $0 to $24,999: 29, 19%
- $25,000 to $49,999: 31, 20%
- $50,000 to $74,999: 19, 12%
- $75,000 to $99,999: 28, 18%
- $100,000 to $124,999: 19, 12%
- $125,000 or higher: 19, 12%

7. Where do you live?

![Residence Pie Chart]

*Residence Distribution*:
- Fairfield County (0)
- Lexington County
- Newberry County
- Richland County
- City of Columbia
- Fort Jackson (0)
- Not Applicable
- City of Columbia: 104, 56%
- Lexington County: 46, 25%
- Newberry County: 32, 17%
- Not Applicable: 2, 1%
8. How long have you lived in the Central Midlands Region?

![Length of Residence in Region](image)

9. Where do you work or go to school?

![Location of Work or School](image)
10. What is your current employment status?

![Employment Status Chart]

- **Employed full time**: 113 (61%)
- **Employed part-time**: 24 (13%)
- **Self-employed/Freelance/Entrepreneur**: 14 (7%)
- **Work in the home/Stay-at-home**: 7 (4%)
- **Unemployed or temporarily laid off**: 7 (4%)
- **Retired**: 4 (2%)
- **Student**: 3 (2%)
- **Other**: 13 (7%)
11. How do you usually travel to downtown Columbia? *Please select all that apply*

- I drive downtown: 150
- I walk downtown: 37
- I cycle downtown: 24
- I ride the Comet downtown: 29
- I take a taxi downtown: 8
- I carpool or vanpool downtown: 10
- I use Uber/Lyft downtown: 30
- Other: 4
12. How would you prefer to travel downtown? *Please select all that apply.*

**Preferred Travel Downtown**

- Drive downtown: 69
- Walk downtown: 56
- Cycle downtown: 60
- Ride transit downtown: 129
- Take a taxi downtown: 4
- Carpool or vanpool downtown: 16
- Use Uber/Lyft: 25
- Other: 7
13. When thinking about downtown Columbia specifically, have you done any of the following in the past 12 months? *Please select all that apply.*

- [ ] Ate at a downtown restaurant
- [ ] Attended a special event or festival
- [ ] Traveled downtown for work of a meeting
- [ ] Walked or toured a museum or historical attraction
- [ ] Attended a concert or show at a downtown venue
- [ ] Shopped at a downtown retailer
- [ ] Attended a class at a school located downtown
- [ ] Did not travel downtown

### Recent Downtown Activities

- **175** Ate at a downtown restaurant
- **167** Attended a special event or festival
- **155** Traveled downtown for work of a meeting
- **136** Walked or toured a museum or historical attraction
- **120** Attended a concert or show at a downtown venue
- **147** Shopped at a downtown retailer
- **47** Attended a class at a school located downtown
- **2** Did not travel downtown
14. Do you currently ride the COMET for some or all of your trips?

COMET Riders

- Yes: 37, 20%
- No: 148, 80%
15. Which of the following transportation modes have you used in the past two years either within the region or traveling away from the Columbia area? Please select all that apply.

**Recent Regional Travel Modes Utilized**

- Personal Car: 168
- Plane: 120
- Amtrak Train: 28
- Bike: 73
- Taxi: 62
- Uber/Lyft: 72
- The COMET: 48
- Greyhound Bus: 11
- Mega Bus: 23
- Other: 28
16. Which transportation services would you like to have access to from a regional transportation center? Please select all that apply.
17. What amenities should be located at the Regional Transportation Center? *Please select all that apply.*
18. How likely do you think you would be to visit a Regional Transportation Center in downtown Columbia?

![Likelihood of Utilization](image)

19. Do you believe that a Regional Transportation Center addresses the needs of the city or region?

![Transportation Center Needed?](image)

*Figure 11: Public Input Questionnaire Responses*
Central Midlands Regional Intermodal Transportation Center Feasibility Study

The most notable responses to the survey included the following:

- Most respondents indicated that they currently drive to travel downtown but would prefer to take transit downtown.
- Only 20% of the respondents currently ride the Comet.
- Most people would like to see a Regional Transportation Center that is served by a train to Charlotte or Amtrak service and Comet bus service.
- The most important amenities at the Center would include:
  - Public Restrooms
  - Real Time Travel Information
  - Charging Stations
  - Food Service/Concessions
- When asked how likely they would be to visit a Regional Transportation Center in downtown Columbia 64% of respondents indicated that they would be likely or very likely to do so.
- When asked if they believed that a Regional Transportation Center would address the needs of the City or region, 75% of the respondents indicated that they did.

ENVIRONMENTAL ANALYSIS

Site Overview and Environmental Assessment

Building a new regional intermodal transit facility (RITC) will require the acquisition of property or a long-term lease. The purpose of the environmental analysis is to analyze the top four RITC locations identified in the RITC Feasibility Study to ensure the locations were selected without regard to race, color, or national origin. This study also compares the equity impacts of four siting alternatives. The CMRTA is the entity whom will be charged with submitting environmental documentation to the Federal Transit Administration if this project is advanced to property acquisition, design and construction.

Sites have been evaluated and ranked as part of the RITC Feasibility Study process and the CMRTA has been involved in the initial site selection, ranking of the initial 22 properties for preliminary evaluation, as well as the selection of the top four siting alternatives and the preferred site.

Twenty-two potential properties were initially evaluated with members of the steering committee comprised of leadership from CMCOG, CRMTA, the City of Columbia, and Richland County. Site selection criteria included property ownership, adjacent street connectivity, access to major thoroughfares, relative congestion, and proximity to the current location of the RITC. From the original twenty-two sites, four were selected to move forward through a preliminary equity analysis and environmental evaluation. The four sites selected to move forward included the following:

Existing Site – 1745 Sumter Street (Site 4)
Alternative Site 1 – 2805 N. Main Street (Site 21)
Alternative Site 2 – 2222 Main Street (Site 22)
Alternative Site 3 – 2001 Taylor Street (Site 14)

Each of the sites are discussed in detail on Technical Papers – Environmental Analysis. For the purpose of brevity, full data is presented only for the preferred site below.

**Site 4 – 1745 Sumter Street**

This site is the location of the current RITC for CMRTA. The current RITC occupies approximately 0.73 acres along Laurel Street at the intersection with Sumter Street. The current use for this property is the CMRTA transit center. The evaluation of this site would include the addition of four contiguous parcels located to the south of the current transit center. The composition of these parcels is approximately 1.4 acres. Parcel data for each is shown in the table below.

<table>
<thead>
<tr>
<th>PARCEL ID</th>
<th>OWNERSHIP</th>
<th>CURRENT USE</th>
<th>ZONING</th>
</tr>
</thead>
<tbody>
<tr>
<td>R09015-10-06</td>
<td>Robert Wilder</td>
<td>Surface parking</td>
<td>C-5</td>
</tr>
<tr>
<td>R09015-10-07</td>
<td>City of Columbia</td>
<td>Surface parking</td>
<td>C-5</td>
</tr>
<tr>
<td>R09014-03-04</td>
<td>City of Columbia</td>
<td>Surface parking</td>
<td>C-5</td>
</tr>
<tr>
<td>R09014-03-03</td>
<td>Jeannie Rubin</td>
<td>Surface parking</td>
<td>C-5</td>
</tr>
</tbody>
</table>

With the City of Columbia zoning classifications for C-5, a transit facility is permitted with exception by the Board of Zoning appeals. This site also falls within the City Center Design
District requiring additional requirements for the building’s façade. Existing zoning for the site and adjacent properties are shown on the graphic above.

The subject properties indicate, based on known and available data sources as a part of this preliminary evaluation, that the subject property is not currently located within a flood plain. The subject parcels do not contain any known streams or the presence of wetlands. The presence of hazardous materials was not determined to be on the subject parcels based on available data. The subject parcels are currently paved and serve as surface parking for the adjacent buildings within their vicinity.

A review of available historic places and districts for the subject parcels indicates that seven historic properties are within immediate proximity of the subject parcels. The locations of these historic places are shown on the graphic below.

As shown above, there are no historically registered buildings or places located on the subject parcels. No direct impact to the adjacent historic buildings or districts is envisioned with the RITC on this site.
The following table summarizes the environmental findings for each of the four sites examined in this environmental analysis.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Site 4</th>
<th>Site 14</th>
<th>Site 21</th>
<th>Site 22</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Air Quality Conformity</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Current Zoning</strong></td>
<td>C5</td>
<td>M1 &amp; C-3</td>
<td>MX-1</td>
<td>MX-1</td>
</tr>
<tr>
<td><strong>Allowable Use</strong></td>
<td>Permitted with exception by board of zoning appeals</td>
<td>M1- Permitted; C-3 permitted with exception</td>
<td>Permitted with exception by board of zoning appeals</td>
<td>Permitted with exception by board of zoning appeals</td>
</tr>
<tr>
<td><strong>Historic Resources</strong></td>
<td>Adjacent</td>
<td>Adjacent</td>
<td>Adjacent</td>
<td>Adjacent</td>
</tr>
<tr>
<td><strong>Acquisitions Required</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Relocation Required</strong></td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td><strong>Hazardous Materials Present</strong></td>
<td>Not Present</td>
<td>Present</td>
<td>Not Present</td>
<td>Present</td>
</tr>
<tr>
<td><strong>Parks</strong></td>
<td>No</td>
<td>No</td>
<td>Adjacent*</td>
<td>No</td>
</tr>
<tr>
<td><strong>Wetlands (on site)</strong></td>
<td>Not Present</td>
<td>Not Present</td>
<td>Not Present</td>
<td>Not Present</td>
</tr>
<tr>
<td><strong>100 Yr Floodplain</strong></td>
<td>Not Present</td>
<td>Not Present</td>
<td>Not Present</td>
<td>Not Present</td>
</tr>
<tr>
<td><strong>Water Quality Impacts</strong></td>
<td>None known</td>
<td>None known</td>
<td>None known</td>
<td>None known</td>
</tr>
</tbody>
</table>

*The North Main Community Garden is presently on the subject property. While not specifically a park it is a community gather space in addition to being adjacent to Earlewood Park.

**Table 5: Summary of Environmental Findings**

**Equity Analysis**

Executive Order 12898 requires federal agencies to identify and address disproportionately high and adverse human health or environmental effects of their programs or projects on minority and/or low-income populations. As per FTA C 4702.1B, Title VI equity analyses for the location of facilities must occur in the planning stage before a preferred site has been selected. Sites have been evaluated and ranked as part of the RITC Feasibility Study process and the CMRTA has been involved in the initial site selection, ranking of the initial 22 properties for preliminary evaluation, as well as the selection of the top four siting alternatives. Site 4 – the current location of the CMRTA transfer facility emerged as the preferred location from this study.
Equity (also called justice and fairness) is referred to the distribution of impacts and whether that distribution is considered fair and appropriate. Transportation planning decisions can have significant and diverse equity impacts:

- The quality of transportation available affects people’s economic and social opportunities.
- Transport facilities, activities and services impose various indirect and external costs, such as congestion delay and accident risk imposed on other road users.
- Infrastructure costs not funded through user fees, pollution, and undesirable land use impacts.
- Transport expenditures represent a major share of most household, business and government expenditures.
- Transport facilities require significant public resources (tax funding and road rights of way), the allocation of which can favor some people over others.
- Transport planning decisions can affect development location and type, and therefore accessibility, land values and local economic activity.
- Transport planning decisions can affect employment and economic development which have distributional impacts.

Title VI Compliance

Central Midlands Regional Transit Authority is committed to ensuring that no person is excluded from participation in, or denied the benefits of its transit services on the basis of race, color, or national origin, as protected by Title VI in Federal Transit Administration (FTA) Circular 4702.1.B. The public can find CMRTA’s current Title VI Program/Plan that includes steps for submitting a Title VI complaint on the web at: [http://catchthecomet.org/civil-rights/](http://catchthecomet.org/civil-rights/)

Title VI of the Civil Rights Act of 1964 states that “[n]o person in the United States shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance.” Title VI further authorizes federal agencies that make grants (for example, the U.S. Department of Transportation [DOT]) to develop compliance guidance for its recipients.

Title 49 CFR Section 21.9(b)(3) states, “In determining the site of location of facilities, a recipient or applicant may not make selections with the purpose or effect of excluding persons from, denying them the benefits of, or subjecting them to discrimination under any program to which this regulation applies, on the grounds of race, color, or national origin; or with the purpose or effect of defeating or substantially impairing the accomplishment of the objectives of the Act or this part.” Title 9 CFR part 21, Appendix C, Section (3)(iv) provides, “The location of projects requiring land acquisition and the displacement of persons from their residences and businesses may not be determined on the basis of race, color, or national origin.”
CMRTA is required to conduct a Title VI equity analysis to ensure the location is selected without regard to race, color, or national origin. Per guidance in the circular, this analysis must:

- Include outreach to persons potentially impacted by the siting of the facility;
- Compare impacts of various siting alternatives;
- Determine if cumulative adverse impacts might result due to the presence of other facilities with similar impacts in the area; and
- Occur before the selection of the preferred site.

**Analysis Methodology**

The primary purpose of this equity analysis is to estimate the distribution of benefits and burdens of the proposed land use and transportation impacts on disadvantaged communities, and to assess whether these benefits and burdens are shared equitably across all population groups. This memo summarizes the various elements evaluated in this analysis. This analysis has been developed for the evaluation of potential impacts associated with the potential relocation/expansion of the CMRTA RITC on disadvantage communities.

**Populations and Geographies**

The underlying methodology for conducting and equity analysis for the transit feasibility study relies on a comparison of benefits and burdens on different population groups (minority vs non-minority and low-income vs non-low income populations), and across different geographies (communities of concern vs the reminder of the region). 2011-2015 American Community Survey 5-Year estimates includes poverty and race and ethnicity information at the block group level. It is important to note that block groups are the smallest geography for which income data is available.

<table>
<thead>
<tr>
<th>Site</th>
<th>Block Group</th>
<th>Census Tract</th>
<th>Percent Below Poverty Level</th>
<th>Difference from City Poverty Level</th>
<th>Percent Minority</th>
<th>Difference from City Minority Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>2</td>
<td>31</td>
<td>44.5%</td>
<td>+20.8%</td>
<td>30.7%</td>
<td>-21.2%</td>
</tr>
<tr>
<td>14</td>
<td>1</td>
<td>31</td>
<td>58.0%</td>
<td>+33.8%</td>
<td>70.3%</td>
<td>+18.3%</td>
</tr>
<tr>
<td>21</td>
<td>2</td>
<td>7</td>
<td>14.1%</td>
<td>-10.1%</td>
<td>28.7%</td>
<td>-23.2%</td>
</tr>
<tr>
<td>22</td>
<td>1</td>
<td>7</td>
<td>6.4%</td>
<td>-17.8%</td>
<td>23.2%</td>
<td>-28.7%</td>
</tr>
</tbody>
</table>

The following graphics depict the income and race and ethnicity for the four (4) sites being considered. The Table below summarizes the income and race and ethnicity demographics for each site.

The City of Columbia, South Carolina, for which each of the considered sites are within the corporate limits of, has a percent below poverty of 24.2% and is 51.9% of the population identifies as a minority.
In addition to the American Community Survey information compiled on income and race and ethnicity, 2010 Census data was also reviewed for race and ethnicity. In the 2010 Census the City of Columbia is listed as 48.3% minority. It is important to note that the 2010 census data did not include income data at the block level.
2010 Census Race & Ethnicity data

<table>
<thead>
<tr>
<th>SITE</th>
<th>NUMBER OF BLOCKS WITHIN OR ADJACENT TO SITE</th>
<th>NUMBER OF BLOCKS WITH RESIDENTS</th>
<th>NUMBER OF BLOCKS WITH MINORITY PERCENTAGE ABOVE CITY PERCENTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>9</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>14</td>
<td>9</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>21</td>
<td>13</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>22</td>
<td>10</td>
<td>8</td>
<td>3</td>
</tr>
</tbody>
</table>

Race and ethnicity for each of the four subject sites is depicted graphically on the following pages.
2010 US Census Data: Site 4

**SITE 4**

<table>
<thead>
<tr>
<th>TOTAL POPULATION</th>
<th>106</th>
</tr>
</thead>
<tbody>
<tr>
<td>MINORITY</td>
<td>35</td>
</tr>
<tr>
<td>WHITE</td>
<td>71</td>
</tr>
<tr>
<td>PERCENT MINORITY</td>
<td>33%</td>
</tr>
</tbody>
</table>
### 2010 US Census Data: Site 14

<table>
<thead>
<tr>
<th>SITE 14</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL POPULATION</td>
<td>624</td>
</tr>
<tr>
<td>MINORITY</td>
<td>624</td>
</tr>
<tr>
<td>WHITE</td>
<td>0</td>
</tr>
<tr>
<td>PERCENT MINORITY</td>
<td>100%</td>
</tr>
</tbody>
</table>
2010 US Census Data: Site 21

<table>
<thead>
<tr>
<th>SITE 21</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL POPULATION</td>
<td>120</td>
</tr>
<tr>
<td>MINORITY</td>
<td>43</td>
</tr>
<tr>
<td>WHITE</td>
<td>77</td>
</tr>
<tr>
<td>PERCENT MINORITY</td>
<td>36%</td>
</tr>
</tbody>
</table>
The results of the minority and low income analysis indicate that minority and/or low-income populations are present within or adjacent to each of the four sites that are being considered. Of the four sites considered, site 14 has the highest minority population adjacent to the subject site at 100%. Site 14 is located opposite both Benedict College and Allen University which are both historic black colleges.

Benefits and Burdens Analysis
The next step in the analysis is to determine if there is potential for disproportionally high and adverse human health or environmental effects to the adjacent populations (minority and low income). A disproportional high or adverse effect is one where the
impact is greater to the minority or low-income population as compared to the non-minority population and/or the non-low-income population. Stated simply, the impact is one that would be borne predominately by a minority or low-income population.

These impacts for each of the sites are evaluated by examining the changes in land use and noise levels, other environmental impacts, and any off-setting project benefits. Each of the sites are discussed in greater detail below.

At the community level, the biggest change between each of the sites is the relocation of the current CMRTA to one of the other three sites from its current location (site 4). This relocation will impact each of the current 28 routes the CRMTA operates in Columbia and has the potential to either increase or decrease the length or the route which could increase the ride times. It is important to note that the majority of the current routes (4 of 28) are located to the east of the City of Columbia and therefore, would likely increase the overall route length for the majority of routes. However, all four of the sites being considered are located adjacent to an existing route Site 4 (current location of transit center – all routes), Site 14 (routes 12 & 22), Site 21 (Routes 31 & 101), and Site 22 (Routes 31 & 101). Therefore, potentially no new streets would be required to access the proposed transit facilities or for circulation around the sites.

At the site level, with any new development that serves large motor vehicles on a high frequency basis, there is the concern for noise impacts, increased traffic volumes, and air and light pollution. For site 4, the current transit center is an adjacent land use and the parcels to be includes current serve as parking lots. The site is also bordered by multi-lane streets with significant peak hour and daily traffic volumes. The increase in bus traffic is likely to not have a significant impact on the adjacent properties.

Site 14 is currently being utilized as a ready-mix cement plant with heavy truck traffic access both Taylor and Harden streets. The site is also bordered by an active railroad line. Both Harden Street and Taylor Street serve as major thoroughfares for the City of Columbia. The increase in bus traffic will likely have minimal impact on the operations of adjacent streets.

Sites 21 and 22 are both located along N. Main Street, north of Elmwood Avenue. While a commercial area, significant residential housing is located adjacent to the corridor. The increase in traffic has the potential to elevate noise levels to adjacent properties. The degree of noise impact cannot be substantiated now without a concept plan. Main Street is a major thoroughfare in the City of Columbia providing north-south connectivity through the city. Increases in traffic are not intended to have a significant impact on Main Street.

The table below summarizes the findings for Equity Analysis performed for this study.
<table>
<thead>
<tr>
<th>SITE 4</th>
<th>POTENTIAL POSTIVE COMMUNITY IMPACTS (BENEFITS)</th>
<th>POTENTIAL ADVERSE COMMUNITY IMPACTS (BURDENS)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Absence of residential properties</td>
<td>• Potential increase in bus traffic (expansion)</td>
</tr>
<tr>
<td></td>
<td>• Current location of Transit center</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Minimal impact to current bus route layout</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SITE 14</th>
<th>POTENTIAL POSTIVE COMMUNITY IMPACTS (BENEFITS)</th>
<th>POTENTIAL ADVERSE COMMUNITY IMPACTS (BURDENS)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Adjacent to current service routes</td>
<td>• Two historic minority colleges adjacent to site</td>
</tr>
<tr>
<td></td>
<td>• Located to the east of downtown – higher density of bus routes</td>
<td>• Increase in bus traffic at intersection of Harden and Taylor Streets</td>
</tr>
<tr>
<td></td>
<td>• Corner parcel – access to two major thoroughfares (N/S &amp; E/W)</td>
<td>• Potential increase in noise levels to adjacent properties</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SITE 21</th>
<th>POTENTIAL POSTIVE COMMUNITY IMPACTS (BENEFITS)</th>
<th>POTENTIAL ADVERSE COMMUNITY IMPACTS (BURDENS)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Located along a major thoroughfare</td>
<td>• Adjacent to minority and low-income residents</td>
</tr>
<tr>
<td></td>
<td>• Adjacent to an active rail line – potential to intermodal connectivity</td>
<td>• Increase in bus traffic along Main Street and River Road</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Potential increase in noise levels to adjacent properties</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Requires several commercial and one residential taking.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Further west of current transit center and proximity of majority of bus service routes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SITE 22</th>
<th>POTENTIAL POSTIVE COMMUNITY IMPACTS (BENEFITS)</th>
<th>POTENTIAL ADVERSE COMMUNITY IMPACTS (BURDENS)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Located along a major thoroughfare</td>
<td>• Adjacent to minority and low-income residents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Increase in bus traffic along Main Street</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Potential increase in noise levels to adjacent properties</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Further west than current transit center and proximity of majority of bus service routes.</td>
</tr>
</tbody>
</table>

Table 6: Environmental Analysis - Equity Analysis Findings

Equity Analysis Conclusions
All locations identified and evaluated for the potential CMRTA transit facility were selected without regard to race, color, or national origin. An evaluation of the poverty rate and minority population rate in the vicinities of the top four sites indicate that there are low-
income and minority populations present and adjacent to the proposed sites. Based on the available information and without full conceptual site plans for each of the four sites, a direct evaluation of the quantitative impacts cannot be completed for traffic, noise, and other direct environmental impacts. However, a qualitative assessment of these impacts has been prepared. Based on this assessment, the potential exists for greater impact at sites 14, 21 and 22 to low income and minority populations at these sites as compared to site 4. Based on this evaluation, site 4 has the least impact to low-income and minority populations.

**MARKETS AND OPPORTUNITIES ANALYSIS**

**Introduction and Executive Summary**

To evaluate the market demand for all uses, the Wendel Team reviewed readily available economic and market data for the Columbia Metropolitan Statistical Area (MSA) and conducted interviews with local and regional real estate developers, brokers, economic development entities, and civic/cultural representatives.

In addition, the Wendel Team analyzed the potential fiscal and economic benefits of the proposed redeveloped and expanded transit center to test the capacity of the residential and commercial uses to generate one-time and ongoing jobs, payroll and taxes to justify public funding in infrastructure and public realm improvement components of the project. Following is a summary of findings and recommendations to date.

**Summary of Financial Feasibility and Economic Benefits**

Based on the results of the real estate market analysis and a test-fit of site capacity according to Wendel’s engineering planning and design evaluation, it is recommended that the near-term development strategy target approximately 435,000 square feet of mixed-use development including office, a public transit center, 155 units of multifamily rental housing, 571 shared-use parking spaces, and a nominal amount of ancillary retail to serve as an amenity to the Transportation Center tenants and visitors (7,200 square feet). A summary of the conceptual development program and assumed revenue targets is provided in the following Table 7.

<table>
<thead>
<tr>
<th></th>
<th>Square Feet</th>
<th>SF/Unit</th>
<th>Units</th>
<th>Revenue Targets</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office</td>
<td>20,100</td>
<td></td>
<td></td>
<td>$24.00</td>
<td>Class A Columbia CBD, Colliers</td>
</tr>
<tr>
<td>Public Transit Center</td>
<td>10,500</td>
<td></td>
<td></td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td>7,200</td>
<td></td>
<td></td>
<td>$22.00</td>
<td>Class A Columbia CBD, Colliers</td>
</tr>
<tr>
<td>Multifamily Residential /1</td>
<td>155,400</td>
<td>1,000</td>
<td>155</td>
<td>$1.10</td>
<td>Average CBD/submarket ($1.38, $0.94)/SF</td>
</tr>
<tr>
<td>Parking Structure/2</td>
<td>242,000</td>
<td>350</td>
<td>576</td>
<td>$95.00</td>
<td>Columbia Parking Report, Colliers</td>
</tr>
<tr>
<td><strong>Total Square Feet</strong></td>
<td><strong>435,200</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1/ Assumes rental product and gross square feet for construction cost estimates/ 975 sq. ft. net for rent).
2/ Assumes 3 stories; $95/space/month.

Source: Colliers Market Insights - Columbia, SC, Q4 2016; Willdan, 2017

Table 7: CMCOG RITC Site Recommended Development Program and Target Revenue
There are several conditions of financial feasibility that will ultimately drive the market demand required to support a high-density mixed-use concept. These considerations include:

- Site capacity (net of all transit operations)
- Efficient and compatible adjacencies of uses
- Entrances and egress locations
- Dedicated and shared parking capacity
- Transit center design and programming that will serve to improve the center’s perception of safety and efficiency
- Enhanced involvement of the Center City Partnership to address the prevalent vagrancy surrounding the site (panhandling, public urination, etc.)

Each of these factors are critical to assessing the actual potential for success of market rate uses at the site. The success of the center and any ancillary real estate uses depends upon the actual and perceived safety and security of the transit center area. Operations must achieve a significantly higher level of safety and security, perception of “clean and safe” than currently provided. The Wendel Team’s market analysis concluded that a project incorporating high density mixed use product could successfully attract private investment interest in a downtown transit center location with certain caveats.

A summary of the financial feasibility and economic benefits findings that could be expected to result from a multifamily rental-anchored mixed-use development at the CMCOG RITC Site is provided in the following discussion.

- The financial feasibility analysis assumes a minimum target return (hurdle rate) of 7.5%, a maximum target return (hurdle rate) of 15%, and an average target multifamily rental rate of $1.27 per square foot.
- Taking these development costs and revenue assumptions into consideration, the Residual Land Value Analysis (“RLV”) indicates that the total estimated capitalized market value (project revenues) at reversion (the year the project is stabilized) are estimated to be $38.32 million for multifamily apartment, office, and retail operations (private sector development component only).
- Total estimated project costs for the commercial and residential components are estimated to be $33.88 million (excluding the cost of land, the public transit center, and parking).
- Assuming a targeted return on investment of $2.87 million (7.5% hurdle rate) to $5.75 million (15% hurdle rate), the maximum supported investment is $32.57 million (15% hurdle rate) to $35.45 million (7.5% hurdle rate).
- The Residual Land Value (“RLV”) per square foot is positive assuming the minimum target hurdle rate at $14.41 per square foot and negative assuming the maximum target hurdle rate ($-11.98 per square foot) indicating that the project would be considered financially feasible only if assuming:
o Publicly subsidized land and parking costs;
o Minimum threshold multifamily rental rates of $1.27 per square foot; and
o The developer is willing to accept a lower threshold for return on investment closer to 7.5% as opposed to 15%.

- The combined public transit and private residential/commercial uses would require approximately $48.58 million in construction investment.
- Assuming 60% of construction costs are attributable to construction materials, approximately $29.15 million of spending on construction materials could be expected to occur in the local and regional market.
- It is estimated that the CMCOG project could be expected to generate approximately $19.43 million in construction wages (40% of total development costs). Assuming an average annual construction wage of $38,950, the project could be expected to create approximately 499 total construction jobs (or 249 full-time equivalent construction workers assuming a 24-month construction timeframe). Direct construction wages are expected to generate indirect and induced spin-off spending in the local and regional market in the range of 1.58 times direct spending ($5.1 million in indirect spending, $6.04 million in induced spending, or total direct, indirect and induced payroll spending equal to $30.62 million)\(^1\).
- Assuming a state and local tax rate of 8%, spending on construction materials could be expected to generate approximately $2.3 million in sales taxes (although the sourcing of materials is unknown and some portion of sales tax benefits are expected to occur outside the State of South Carolina).
- Employment from ongoing residential and commercial operations is expected to generate nominal jobs (6 to 10 full-time equivalent (“FTE”) multifamily jobs, 16 FTE retail jobs, and between 40 to 80 office jobs. The total combined payroll from private sector jobs is approximately $5.35 million annually. Assuming an industry average indirect and induced multiplier of 1.2 times direct payroll impacts, the residential and commercial uses could be expected to generate approximately $6.42 million in direct, indirect and induced spending in the local and regional economy.
- Ongoing taxes related to the multifamily and commercial uses are expected to be nominal. Assuming the construction investment value of $33.88 million (in Year 1, prior to establishing assessed value), the project is expected to generate approximately $26,000 in annual real property tax revenues\(^2\) and approximately $259,000 in state and local retail sales tax revenues.

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\(^1\) IMPLAN Group LLC’s Input-Output (I/O) model is the industry standard quantitative economic methodology for calculating interdependencies between industries in local and regional economies. http://implan.com/

\(^2\) Assumes City of Columbia, Richland County and Richland County School District 1 Mill Levy Rate = 0.5367 per $1,000 of assessed value.
The underlying rationale in support of the proposed CMCOG RITC Site’s financial feasibility and potential fiscal and economic benefits is provided in the following discussion.

**Site Characteristics and Market Potential**

This market and opportunities findings and recommendations detailed in this executive summary are based on an evaluation of the project site, the competitive context of the regional market area, a demographic and economic analysis, and review of primary real estate data (rents, absorption rates, occupancy rates, sales prices per square foot) and other factors. The detailed real estate market analysis supporting these findings is provided in the following section.

**Site Competitive Context**

Following the selection of the Central Midlands Regional Intermodal Transportation Center preferred site (“CMCOG RITC Site”) located at 1225 Laurel St, Columbia, South Carolina (intersection of Laurel Street and Sumter Street), the Project Team conducted a real estate market analysis to evaluate the potential for ancillary commercial uses with the project site in the context of the Downtown Columbia submarket and its competitive position within the Columbia Metropolitan area.

The proposed CMCOG RITC Site is well located in a strong submarket and can provide the ridership with linkages to area employment in two potential submarkets. Downtown’s current highest-density area and the longer-term built out of The Commons at Bull Street, which is expected to evolve into its own submarket over the next 20 to 30 years.

As context, Downtown is fortunate to be located at the center of the Columbia Metropolitan Statistical Area (“MSA”), which boasts a high-quality workforce and an affordable cost of living attractive to corporate and retiree relocations. These factors continue to drive employment and population growth in the Columbia MSA.

Data informing the demographic analysis is based on the following two market areas to evaluate trends in population growth, household income, retail spending, employment, and other factors:

- City of Columbia, SC – defined as within the city limits.
- CMCOG RITC Site Regional Market Area (defined as within a 30-minute drive-time of the project site and including the City of Columbia and parts of Richland and Lexington Counties, SC)

The following Error! Reference source not found.2: CMCOG RITC Site Market Area – City of Columbia, Richland & Lexington Counties, & 30-Minute Drive Time from Proposed Site provides an illustrative of the assumed primary and secondary market area relevant to future redevelopment of the CMCOG RITC Site.
Figure 12: CMCOG RITC Site Market Area – 30-Minute Drive Time from Proposed Site
Demographic and Economic Indicators
The commercial development strategy related to the CMCOG RITC Site is informed by a primary real estate market analysis to define the conditions of feasibility for mixed- and multi-use redevelopment within Downtown Columbia submarket.

The demand for new real estate development investment is further tested against the following baseline demographic and economic profile that analyzes the City of Columbia and its economic relationships to the region.

The detailed profile of the City of Columbia’s current economy and forecast trends for the short-term (5 years from 2017 to 2022) in the following Table 8 include a variety of site selection factors: population growth trends by age and income; household income and retail spending power; household tenure; poverty rates, unemployment, educational attainment; and labor force characteristics including number and types of businesses, employment by sector, and annual payroll; and economic vitality rankings.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Household Growth</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City of Columbia</td>
<td>45,932</td>
<td>49,508</td>
<td>52,227</td>
<td>2,719</td>
</tr>
<tr>
<td>CMCOG 30-Min Drive Time</td>
<td>212,701</td>
<td>228,254</td>
<td>242,095</td>
<td>13,841</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>CAGR</td>
</tr>
<tr>
<td>City of Columbia</td>
<td>1.1%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CMCOG 30-Min Drive Time</td>
<td>1.2%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2017 Comparative Demographic Factors</th>
<th>City of Columbia</th>
<th>CMCOG 30-Min Drive Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>136,866</td>
<td>228,254</td>
</tr>
<tr>
<td>Families</td>
<td>23,888</td>
<td>135,487</td>
</tr>
<tr>
<td>Average Household Size</td>
<td>2.18</td>
<td>2.46</td>
</tr>
<tr>
<td>Owner Occupied Housing Units</td>
<td>22,493</td>
<td>149,315</td>
</tr>
<tr>
<td>Renter Occupied Housing Units</td>
<td>27,015</td>
<td>85,455</td>
</tr>
<tr>
<td>Median Age</td>
<td>29.5</td>
<td>36.2</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$42,312</td>
<td>$53,953</td>
</tr>
<tr>
<td>Average Household Income</td>
<td>$67,493</td>
<td>$72,803</td>
</tr>
</tbody>
</table>


Table 8: City of Columbia & CMCOG RITC Site 30-Minute Drive Time, 2010-2017-2022
Key Demographic Findings

- **Population Growth Tends:** While the City of Columbia’s population is projected to grow at a modest rate of 1.1% annually (increasing by approximately 2,720 households from 2017-2022), there is substantial household growth projected for the CMCOG RITC Site regional market area (defined as a 30-minute drive time from 1225 Laurel St, Columbia, South Carolina, 29201). Approximately 13,840 households are expected to locate within this market area over the next five years. Based on data provided by the City of Columbia, there are multiple residential projects in the development pipeline that planned or under construction over the next five years. It will be important to track construction and absorption of residential development to determine if there is sufficient near-term demand for additional residential product not already in the planning stages.

- **Household Characteristics:** Average household size in the City of Columbia is 2.18, increasing to 2.46 persons per household in the CMCOG regional market area indicating a higher predominance of families in the suburbs. The median age in Columbia is 29.5 years old, increasing to 36.2 years in the CMCOG regional market area. The regional market area also offers a healthy population base in the prime workforce age (25 and 54 years old) of 36% of total population.

- **Housing Tenure Characteristics:** Currently in the CMCOG regional market area, 33.1% of housing is occupied by renters, 57.8% is owner-occupied and 9.1% of housing stock is vacant. Notably, rental housing stock is expected to maintain the same share of total occupied housing stock through 2022. According to Trulia, the rate of homeownership nationally declined by 5% from 2006 to 2014, and the trend of an increasing share of housing renters over buyers is expected to continue.

- **Household Income:** In the CMCOG regional market area, 31.5% of households earn less than $35,000 annually; 14.2% of households earn between $35,000 to $50,000 annually; 15.4% earn 50,000 to $75,000 annually; and 19.4% earn more than $75,000. Notably, the households earning more than $50,000 annually within the CMCOG RITC Site regional market are expected to increase to from 54.2% to 60.4% of the total market by 2022 (approximately 23,100 new households in the $50,000+ income bracket targeted for new residential construction). This growth is due to a combination of new household formation and increasing household incomes within the existing population.

- **Educational Attainment:** The following provides a snapshot of educational attainment in County. As of 2016, 12% of residents held no high school diploma. Approximately 27% of residents reported some college, and 41% of residents hold a bachelor’s, graduate, or professional degree as compared to the U.S. average of 33% of adults holding a bachelor’s degree or higher. The rate of educational attainment is an important metric in site selection for business expansions and locations.

- **Businesses and Employment:** The City of Columbia is home to 6,902 businesses and 121,302 employees. Employment is projected to grow by 1.75% over the next five years as is evidenced by stakeholder interviews with area businesses who have indicated employment expansion plans. Approximately 66% of employees are white collar or
professional, 13% are blue collar, and 20% are employed in the service sector. The current unemployment rate in the City of Columbia is 6.7% as compared to the U.S. average of 4.9%. Relatively higher unemployment is a challenging metric when attracting new housing development to a market.

- **Economic Vitality Rankings:** According to US News and World Report, the State of South Carolina is ranked 45th of 50 states as a composite score of: health care; education; crime; infrastructure; opportunity; economy; and government. However, the score tied to the “Economy” of South Carolina is ranked 16th of 50 states. Unemployment is lower than the US average and the population statewide has grown by 40% since 2000 – all factors that are supportive of new development activity.

- **Investment Outlook:** Generally, Columbia MSA boasts a high-quality workforce and an affordable cost of living attractive to corporate and retiree relocations. These factors continue to drive employment and population growth. Investors view the market as stable: This is further supported by Columbia’s significant state government anchor and the University of South Carolina, with its downtown enrollment of 33,575. These conditions have insulated Columbia’s economy and made Columbia a solid real estate investment market both regionally and increasingly nationally. Investors view the market as “stable”. The macroeconomic outlook for Columbia and for Downtown Columbia are reported by local and national real estate brokers and developers to be “strong”.


The following real estate market analysis includes a consolidated overview of the constraints and opportunities related to development costs and prevailing lease/sales rates that directly influence the results of the financial feasibility of residential, office and retail, dining, and entertainment uses.

**Real Estate Market Economics**

Following is a real estate market analysis of the Downtown Columbia submarket within the regional context of the Columbia metropolitan area including:

- Downtown Columbia Market Overview
- Multifamily Residential Development Trends
- Office Market Development Trends

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**Figure 13: City of Columbia, SC Demographic Snapshot, 2017**

The following real estate market analysis includes a consolidated overview of the constraints and opportunities related to development costs and prevailing lease/sales rates that directly influence the results of the financial feasibility of residential, office and retail, dining, and entertainment uses.
Central Midlands Regional Intermodal Transportation Center Feasibility Study

- Retail Market Trends
- Parking Capacity Assessment

These findings are based on market data reported by Colliers International Market Insights Report – Columbia, SC (2016 data).

Following the real estate market analysis, an evaluation of mixed-use development opportunities at the CMCOG RITC Site is provided.

Downtown Columbia Market Overview
Downtown Columbia currently boasts 4.8 million square feet of office (2.3 million square feet of Class A, 1.6 million square feet of Class B and 870,000 square feet of Class C), and 420,000 SF retail.

There are 1,250 people living in the Columbia City Center Partnership area alone, and many more when the wider downtown housing market is considered. The downtown submarket is a leader in all asset classes in terms of low vacancy and high rents within the Columbia MSA.

Columbia is experiencing unprecedented redevelopment activity. The Commons at Bull Street is the redevelopment of the 180-acre South Carolina State Hospital Campus into a large scale mixed-used community. Located at the intersection of I-26 and I-77, it is envisioned as Columbia’s “next great neighborhood.”

The Commons is approved for 3,500 residential units, more than 400,000 SF retail, 1.3 million square feet of office and a 170-room hotel. To date, the 8,500-seat Spirit Communications Park, a multi-purpose sports and entertainment venue, and the 105,000 SF First Base Building, a spec office building with ground floor retail have been developed. The Spirit Communications Park project is expected to have a 20 to 30 year build out and must be taken into consideration when planning any additional new mixed-use development activity in the Columbia submarket to mitigate the potential risk of market over-supply.

Multifamily Development Trends
The Central multifamily submarket, which includes downtown and USC-related development is among the strongest in the MSA. While only representing 10% of the MSA apartment market, the Central submarket leads the MSA in development activity, rent, rent per SF and absorption.

The multifamily sector has been very active in this submarket with over 3,000 units delivered in the last 5-years (Table 9). Despite this large new inventory of both student housing beds and rental apartments, the multifamily market has continued to experience rent increases. Residential demand is driven by students and young professionals, primarily in immediate proximity to the University. Market conditions for near and mid-term indicate significant multifamily pipeline will take at least 18 months to absorb.

### Table 9: Columbia Multifamily Submarket – Pipeline and Absorption Trends (Q4 2016)

The occupancy rate for the Columbia metropolitan area improved over the past six months to 91.7% (up from 87.0% in Q4 2016). There was positive absorption recorded during this quarter with the Northeast submarket experiencing the strongest demand. There are approximately 3,600 units proposed in the overall area. More than half of those units are in the Central submarket. Rental rates increased by 2.8% over the past twelve months bringing the average monthly rent to $987.

New supply is forecasted to fall below demand over the next twelve months. This will allow occupancies to rise marginally. Rents are expected to increase 3.0% to 3.5% annually through 2018.

Overall, demand drivers continue to be very positive for downtown housing and the Central submarket and continued rent growth is anticipated in this submarket. With the number of new units under construction declining to its lowest level in three years (3,600 units in the pipeline), Carolina Real Data predicted rent increases by mid-2017 and a return to 2.0% to 2.5% annual rent growth by year end 2017. Based on these factors, the financial feasibility and fiscal analysis assumes a target rental rate of $1.27 per square foot to support the cost of new construction in the CBD (Table 10).

<table>
<thead>
<tr>
<th></th>
<th>Vacancy</th>
<th>Ave SF</th>
<th>Avg Rent</th>
<th>Avg $/SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central</td>
<td>13.6%</td>
<td>1,034</td>
<td>$1,426</td>
<td>$1.38</td>
</tr>
<tr>
<td>Lexington</td>
<td>5.1%</td>
<td>1,051</td>
<td>$959</td>
<td>$0.91</td>
</tr>
<tr>
<td>North</td>
<td>11.5%</td>
<td>810</td>
<td>$554</td>
<td>$0.68</td>
</tr>
<tr>
<td>Northeast</td>
<td>8.2%</td>
<td>1,056</td>
<td>$910</td>
<td>$0.86</td>
</tr>
<tr>
<td>Northwest</td>
<td>7.9%</td>
<td>935</td>
<td>$795</td>
<td>$0.85</td>
</tr>
<tr>
<td>South</td>
<td>13.6%</td>
<td>1,121</td>
<td>$1,083</td>
<td>$0.97</td>
</tr>
<tr>
<td>W. Columbia/Cayce</td>
<td>6.8%</td>
<td>917</td>
<td>$974</td>
<td>$1.06</td>
</tr>
</tbody>
</table>
Office Market Development Trends

Downtown is the strongest MSA office submarket with 10.9% overall vacancy (Q3 2016 Colliers) and little new supply contemplated in the short term. The overall market vacancy is 16.6% (Q3 2016 Colliers) with some submarkets approaching 23%. With downtown’s increased desirability, Class B and C office buildings are seeing greater interest in redevelopment activity. Downtown real estate brokers report that Class A users are moving to open floor plans to maximize space efficiency.

The following Table 11 illustrates that with more than 4.8 million square feet, the Downtown office submarket is the largest submarket in the MSA and continues to be one of the strongest. With 12.0% vacancy in its Class A space; 9.4% in its Class B space and 10.8% in Class C space, downtown’s vacancy is among the lowest in the MSA, according to Colliers market data. Overall market vacancy rate is 16.6% with some submarkets with greater obsolete space experiencing as much as 24% vacant for A, B and C Classes combined. Downtown asking rents at $23.96 per square foot for Class A; $18.78 per square foot for Class B and $16.54 per square foot for Class C are higher than the MSA average in every class. (Compared to average asking rents across the market of $22.01 per square foot for Class A, $17.15 per square foot for Class B and $13.62 per square foot for Class C, respectively.)

<table>
<thead>
<tr>
<th>Submarket</th>
<th>Market Rentable Area (SF)</th>
<th>Total Vacant (%)</th>
<th>Average Asking Rent ($/RSF)</th>
<th>Net Absorption (SF)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Downtown District (CBD)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class A</td>
<td>2,324,922</td>
<td>12.0%</td>
<td>23.96</td>
<td>38,592</td>
</tr>
<tr>
<td>Class B</td>
<td>1,650,023</td>
<td>9.4%</td>
<td>18.78</td>
<td>10,486</td>
</tr>
<tr>
<td>Class C</td>
<td>879,336</td>
<td>10.8%</td>
<td>16.45</td>
<td>-19,095</td>
</tr>
<tr>
<td><strong>Downtown CBD Total</strong></td>
<td>4,854,281</td>
<td>10.9%</td>
<td>21.03</td>
<td>29,983</td>
</tr>
<tr>
<td><strong>Cayce/West Columbia</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class A</td>
<td>63,000</td>
<td>5.2%</td>
<td>20.67</td>
<td>-3,300</td>
</tr>
<tr>
<td>Class B</td>
<td>152,700</td>
<td>1.5%</td>
<td>16.00</td>
<td>517</td>
</tr>
<tr>
<td>Class C</td>
<td>302,954</td>
<td>21.1%</td>
<td>12.15</td>
<td>7,004</td>
</tr>
<tr>
<td><strong>East Columbia</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class A</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Class B</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Class C</td>
<td>86,183</td>
<td>3.7%</td>
<td>14.55</td>
<td>0</td>
</tr>
</tbody>
</table>
With downtown’s increasing desirability as live-work-play neighborhood, Class B and C office buildings are seeing greater interest from buyers as well as repositioning by current owners. The low vacancy rates for B and C class properties relative to the wider market especially underscore the desirability of the submarket: Class B is 9.4% vs 14.7% market average, and C at 10.8% versus market average of 23.2%.

There is a sense of constrained supply downtown. Downtown real estate brokers report that Class A users are moving to open floor plans to maximize space efficiency. Increases in construction costs for high-rise construction relative to current rents, as well as downtown parking costs and constraints, continue to make new speculative construction downtown unlikely. These conditions will continue to place upward pressure on downtown rents and especially increase the desirability of Class B and C properties downtown.

### Table 11: Columbia Office Market Statistics

<table>
<thead>
<tr>
<th>Market</th>
<th>Class A</th>
<th>12.2%</th>
<th>22.01</th>
<th>14,484</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class B</td>
<td>3,216,748</td>
<td>14.7%</td>
<td>17.15</td>
<td>10,298</td>
</tr>
<tr>
<td>Class C</td>
<td>3,247,482</td>
<td>23.0%</td>
<td>13.62</td>
<td>18,429</td>
</tr>
<tr>
<td><strong>Market Total</strong></td>
<td><strong>9,791,124</strong></td>
<td><strong>16.6%</strong></td>
<td><strong>16.83</strong></td>
<td><strong>43,211</strong></td>
</tr>
</tbody>
</table>

Source: Colliers International, Columbia Office (Q3 2016); Willdan, 2017
Based on these factors, the financial feasibility and fiscal analysis assumes a target office rental rate of $25.00 per square foot (triple net) to support the cost of new construction in the CBD.

Retail Market Trends
The following Table 12 illustrates that as compared to the Columbia region, Downtown is a very strong retail submarket with retail space at 4.0% vacancy in a market with 9.4% average vacancy that ranges to 23% in some submarkets.

Downtown retail is comprised of 400,000 square feet of space in anchored centers and 19,000 square feet of small shop spaces (shops less than 10,000 square feet). There is no effective vacancy in the anchored centers and $21.93 per square foot asking rent for small spaces per Colliers Q3 2016 report. Demand for ground floor retail is expected to entice some owners to convert ground floor office space to retail in the near term.
## Table 12: Columbia Retail Market Trends (Q4 2016)

<table>
<thead>
<tr>
<th>MARKET</th>
<th>BUILDINGS</th>
<th>INVENTORY (SF)</th>
<th>VACANCY RATE (%)</th>
<th>VACANT (SF)</th>
<th>AVERAGE ASKING RENT (NNN)</th>
<th>VACANT (SF)</th>
<th>AVERAGE ASKING RENT (NNN)</th>
<th>VACANT (SF)</th>
<th>AVERAGE ASKING RENT (NNN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cayce/West Columbia</td>
<td>15</td>
<td>1,212,954</td>
<td>22.4%</td>
<td>101,249</td>
<td>$5.47</td>
<td>72,265</td>
<td>$7.38</td>
<td>98,043</td>
<td>$10.84</td>
</tr>
<tr>
<td>Downtown</td>
<td>6</td>
<td>405,768</td>
<td>4.7%</td>
<td>0</td>
<td>-</td>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Forest Acres</td>
<td>3</td>
<td>777,296</td>
<td>9.1%</td>
<td>51,728</td>
<td>-</td>
<td>11,754</td>
<td>$18.00</td>
<td>7,523</td>
<td>$17.26</td>
</tr>
<tr>
<td>Harbison/St. Andrews</td>
<td>33</td>
<td>3,535,892</td>
<td>9.5%</td>
<td>41,435</td>
<td>$10.00</td>
<td>83,576</td>
<td>$17.85</td>
<td>209,884</td>
<td>$14.47</td>
</tr>
<tr>
<td>Lexington</td>
<td>14</td>
<td>1,633,267</td>
<td>4.1%</td>
<td>33,245</td>
<td>-</td>
<td>0</td>
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<td>-</td>
<td>-</td>
</tr>
<tr>
<td>North Columbia</td>
<td>5</td>
<td>353,774</td>
<td>11.3%</td>
<td>0</td>
<td>-</td>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Northeast Columbia</td>
<td>28</td>
<td>3,741,291</td>
<td>10.6%</td>
<td>132,243</td>
<td>$7.00</td>
<td>50,020</td>
<td>$7.30</td>
<td>212,586</td>
<td>$14.90</td>
</tr>
<tr>
<td>Southeast Columbia</td>
<td>8</td>
<td>1,109,461</td>
<td>3.2%</td>
<td>0</td>
<td>-</td>
<td>18,000</td>
<td>-</td>
<td>17,950</td>
<td>$11.89</td>
</tr>
<tr>
<td>Market Total</td>
<td>113</td>
<td>12,769,703</td>
<td>9.7%</td>
<td>359,900</td>
<td>$7.11</td>
<td>235,615</td>
<td>$12.24</td>
<td>639,428</td>
<td>$13.96</td>
</tr>
</tbody>
</table>

Source: Research & Forecast Report, Columbia, SC Retail Market: Growing Population Fuels Retail Expansion, Colliers International (Q2 2016); Willdan, 2017
Downtown continues to be a very strong retail submarket with retail space at 4.7% vacancy in a market with 9.4% average vacancy that ranges to 23.0% in some submarkets. Downtown retail is comprised of approximately 400,000 square feet of space. There is no effective vacancy in the anchored centers and the $21.93 per square foot asking rent for small spaces per the Colliers Q3 2016 report in the strongest asking rent in the market. Based on these factors, the financial feasibility and fiscal analysis assumes a target retail rental rate of $23.0 per square foot (triple net) to support the cost of new construction in the CBD.

The following Figure 14 provides a graphic illustration of the Downtown Columbia retail submarket in the context of other competitive submarkets within the region.
Retail Spending Power Analysis

According data reported by ESRI, the Columbia market area is generally oversupplied by retail with the exception of grocery and drinking places (based on a comparison of spending power and area retail sales). However, analysis of existing competitive retail/dining/entertainment properties in terms of competitive amenities offered, vacancy/occupancy rates, and operating characteristics reveals evidence of existing disinvested retail not necessarily meeting demand.

This is especially evident when evaluating the share of fast food as a share of total eating and drinking venues and the perceived pent up demand for a greater diversity of full-service restaurants that operate in the evening hours after 5:00 PM. Based on a profile of stakeholders including residents, daytime employees, visitors, more and better full-service eating/drinking/entertainment offerings are needed to improve the community’s quality of life and to extend the Columbia visitors’ length of stay.

The following Table 13 provides a summary snapshot of the total estimated households, household incomes, and associated retail spending power within a 30-minute drive time of the CMCOG RITC Site in 2017 and 2022. The total estimated net new retail spending power on food and beverage, entertainment, neighborhood serving retail, and other goods/services is associated with anticipated growth over the next five years.

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2022</th>
<th>Net Change</th>
<th>Growth Rate (2017-2022)</th>
<th>Average Annual Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households</td>
<td>228,254</td>
<td>242,095</td>
<td>13,841</td>
<td>6.1%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Avg HH Income</td>
<td>$57,609</td>
<td>$61,912</td>
<td>$4,303</td>
<td>7.5%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Total Household Income</td>
<td>$13,149,485,000</td>
<td>$14,988,586,000</td>
<td>$1,839,101,000</td>
<td>14.0%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Consumer Expenditures1</td>
<td>24.7%</td>
<td>24.7%</td>
<td>24.7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail Spending Power</td>
<td>$3,247,923,000</td>
<td>$3,702,181,000</td>
<td>$454,258,000</td>
<td>14.0%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Average Required Retail Sales per Square Foot /2</td>
<td>$400</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net New Supportable Retail Square Feet by 2021 /3</td>
<td></td>
<td>1,136,000</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1/ As a % of Total HH Income based on the US Consumer Expenditure Survey, 2014.
2/ Retail sales productivity required for new construction/regional or national chains.
3/ Figures are rounded to reflect hypothetical nature of supportable retail space estimates.


Table 13: Retail Spending Power Analysis, RITC Site Regional Market Area (2017-2022)

Taking this spending power into account against the required sales productivity needed to support new retail development at the CMCOG RITC Site, it is estimated that approximately 1.1 million square feet of new retail space could be supported in the Columbia submarket (anywhere) in the next five years. Based on existing data related to oversupply ($1.2 billion, of
which $222,000 is associated with food and beverage establishments), only those projects with clear market support or a niche target would likely attract private sector investment (or substitution of existing retail with new product).

For example, it is expected that grocery growth in the region will remain strong, with Trader Joe’s, Whole Foods and Fresh Market adding stores. Stakeholder interviews indicate that residents are seeking additional whole foods type-healthy grocery store type chains. Downtown is currently served by Publix in The Vista subarea. There has been some discussion of the need for a second grocery store as 4,000 residents will be increasing to 6,000 in next few years.

Parking
With 1,760 available spaces in downtown garages as well as surface lots and street parking, market participant consensus is that the city is over parked in general but under-parked in certain subareas that lack convenient garage parking.

Construction of parking garages is an extraordinary cost in the Columbia region and would likely require city subsidy. Such subsidy may theoretically be possible through city contribution of land, tax abatement or other government programs for projects with sufficient community support.

The current range for monthly garage parking is $65 to $150, with median rate of $95 per month. For the purpose of the financial feasibility and fiscal analysis, parking revenue is excluded to reflect conservative revenue assumptions.

**Recommended Development Opportunities**

The following provides a summary of the CMCOG RITC Site’s redevelopment potential including its strengths, barriers and opportunities including locational, physical, financial, market, regulatory, and political, its competitive market position in the region, and strategies to overcome issues identified as constraints.

As the market data demonstrate, downtown is outperforming most MSA submarkets. Driven by the desirability of the downtown office location to high-wage employers, Downtown’s office, residential base and retail offerings have expanded. In addition, the desire by area employers to offer a unique, walkable urban work environment have fueled the downtown renaissance. In spite of these indicators, however, increases in high-rise construction costs and real and perceived downtown parking constraints make true new mixed-use speculative construction, especially those coupled with the complexities of transit center, unlikely unless mid-rise and carefully planned and/or supported by subsidies.

To evaluate the development opportunities associated with the CMCOG RITC Site redevelopment, an evaluation of the following factors was conducted based on primary real estate market stakeholder research in the Columbia area:

- Competitive/strategic sites for smart growth (re)development (area supply proposed/planned/under construction and impact on future absorption of CMCOG RITC Site,
Central Midlands Regional Intermodal Transportation Center Feasibility Study

- Demand for a mix of uses (e.g. housing, office, retail, recreational, institutional)
- Economic viability of existing retail and service businesses in the area
- Recommendations for any changes that will enhance market appeal and viability for identified (re)development opportunities will be outlined.
- Strategies to enhance their competitive market position, including marketing of the area to potential new residents and businesses and reducing development costs (i.e., construction costs, air rights construction and shared parking).
- Potential impacts of TOD on existing area development and land use activities.

Together with the primary real estate market research (rents, vacancy rates, other competitive development in the pipeline), the following discussion provides the rationale for determining the conditions of financial feasibility for mixed-use development at the CMCOG RITC Site.

Conditions of Mixed-Use Development Financial Feasibility

- **Grocery/Pharmacy Opportunity:** A second downtown grocery store would likely find support given the increasing downtown employment and number of housing units; more research would be required as to best location. However, market experience suggests that a location near Laurel and Sumter could be feasible with significant parking and attractive offerings (Trader Joe’s type selection, fresh foods focus, etc.). Similarly, other service retail such as a pharmacy could achieve success at the transit center site.

- **Creative Mix of Uses:** Consideration should be given to uses that expand the hours of activity in a new mixed-use development. Some suggested that this may mean thinking outside the box to find users that will bring a variety of animation to the area for hours outside the 9-to-5 workday. Potential uses included education/learning providers with longer hours of operation, theater or other entertainment uses, office share providers. Also, office space for active not-for-profits. Office that offers bike storage may appeal to younger demographic was also mentioned as was incubator space.

- **Affordable Housing:** There was a consensus across all stakeholders that that the current transit center site is terribly stigmatized by the perception of crime and vagrancy. If considering a scenario anchored by affordable housing, this use (coupled with bus activity) would limit private sector interest in market rate ground floor retail or other uses.

- **Perception of Crime/Safety:** Currently, Columbia’s transit system is viewed as transportation of last resort, for those without choices. It was pointed out by all interviewees that the downtown transit center (due to its location) is a billboard for the system. The widespread observation of panhandling and loitering there lead to perception of lack of safety/fear of crime surrounding transit uses in general. Given current perceptions of the downtown transit center, it will be very difficult politically to sell its replacement with the same program or level of operation. Emphatically, interviewees did not think a downtown transit center would find political support if it were to be pitched as “just a cleaned-up version of what is there now.”

- **Transit Center Design/Programming Targets:** Many interviewees felt that to be successful a new transit center would need to be very well lit, clean and safe, well policed, ideally with
frontage on a major arterial such as Bull St or Elmwood. Design must be open and airy with clear sight lines so that riders could see where they are going and feel safe entering/interacting with the building. Ideally, a mix of uses, especially high traffic uses active day and evening in the immediately surrounding area would be needed to reinforce safety in the area around the center.

- **Significant Pipeline Development Activity:** The transit center site is competing to attract private investment during a residential building boom in the City of Columbia (Bull Street, Main Street, West End Alley, Gervais Street, etc.). Many real estate professionals felt it would be very difficult, if not impossible, to attract market rate developer interest in co-locating with truly non-subsidized market driven uses (especially new office or market rate residential) assuming a bus transfer center with a program like what is currently provided.

- **Parking Garage:** Although some interviewees relayed that downtown has sufficient parking in terms of lots, garages and street parking spaces, many expressed that garage parking does not conveniently serve downtown destinations. Although by the numbers there are enough parking spaces, the perception of safely and security for visitors coming and going from their cars seems to override the reality of available space. Many believed that new mixed-use development would need a significant garage to be successful.

- **Other Infrastructure Economic Development Priorities:** Funding Several interviewees voiced skepticism regarding the potential for a new transit center to secure needed funding given the City’s large EPA-required drainage improvements and commitment to infrastructure at the Bull Street Commons redevelopment. In short, the City of Columbia is supporting several major infrastructure improvement programs to either support specific development projects or critical public service needs. These priorities must be reconciled with the needs of the proposed transit center and it is unknown whether the City or other State, Federal or private sources would be available to fully fund the required capital investment.

- **Coordination with Main Street Redevelopment Activity:** Some expressed concern that while the Main Street redevelopment is advancing, side street retail is still struggling. They asked: Why should/would the city allow a bus transfer station that could go anywhere to impede the progress of this redevelopment? Why not locate a new facility even a few blocks north or east to allow Main street to continue to prosper? Does it have to be downtown at all to satisfy the transit operators need to transfer passengers between routes?

- **Opportunity to Connect Downtown Nodes:** Of those who saw the need for transit or viewed transit as an asset, many supported the idea of a circulator system for Main St/Vista/5-Points/Downtown/Bull Street—or longer haul full-service bus routes to key regional destinations such as Charlotte Airport, Greenville and Charleston. Bus service such as the clean, safe, convenient service that Mega Bus and Concord Trailways operate in the Northeast Corridor were mentioned as potential models for regional travel. Interviewees saw a downtown transit center as a potential positive for co-locating these other (non-local bus) transit services.

- **Impact of Driverless Technology on Public Transit:** The future impact of driverless cars, buses and taxis should be taken into consideration in any long-term transit planning initiative. For example, the transit center could shift some element of operations to
minibuses on the major routes with better technology to deliver transit capacity on demand. However, low income riders do not own the technology to implement that system. Comet should consider evaluating low tech paging technology to improve efficiencies and the utilization of the transit center.

- **Expand City Center Partnership Services to Support the Transit Center:** It is recommended by several interviewees that the City of Columbia should expand clean/safe initiatives throughout the Downtown to better support for continued revitalization and successful new mixed-use redevelopment. Main Street redevelopment has diverted public resources from the Central Business District (CBD). For example, there is significant lack of functioning street lights throughout downtown, contributing to a serious safety/perception of safety issue that impedes Downtown’s progress. As another example, poor sidewalk infrastructure in some connecting areas was noted as detracting from the pedestrian experience and a high-quality sense of place in the Downtown.

- **City of Columbia Municipal Complex Redevelopment Opportunity:** The City of Columbia is currently undertaking a Master Developer RFP process for the redevelopment of a new municipal administration complex located adjacent to the current transit center. This large-scale public/private redevelopment of an entire city block in proximity to the transit center site provides an opportunity to approach the planning and design process as a cohesive, integrated development. This approach could further support the potential of the site to support a successful mixed-use product type. Furthermore, if city took vested interested, figuratively and literally, a new mixed-use center would be much more likely to succeed economically and operationally.

- **Horizontal vs. Vertical Mixed-Use Alternatives:** It is important to note that the transit center project is initiating planning late in the current real estate cycle. Interest rates and labor costs are rising, depressing return on investment for developers. Vertically integrated mixed use is very expensive from a construction cost standpoint, and it may be necessary to design the transit center as a multi-use or horizontal mixed-use concept in the near-term as Columbia rents currently do not appear to justify the costs of new high-rise without subsidy.

- **Opportunity to Enhance City Livability:** Bicycle and pedestrian advocates indicated that the effort to advance trail systems development (3 Rivers Greenway) and bike share/increased bike use are ongoing. These are considered key quality of life enhancements that Columbia needs to make to be competitive within its peer group in attracting new workforce and employers. Trail systems are often tied into transit in other areas of the county to facilitate easy access and connection. Comet already offers bike racks, but bicycle parking and bicycle share stations should be planned for the transit center at a minimum.

**Real Estate Market Findings and Recommendations**

Through desirable for place making, true large-scale mixed-use development has not been required in many markets with significant availability of land. Columbia has demonstrated some mixed-use development downtown and in new development associated with the University of South Carolina and, in the planning for horizontal mixed-use at Bull Street Redevelopment;
however, overall, the increased cost of vertical construction and complexities of mixed use development coupled with the lack of availability of subsidies have not supported large-scale high-rise mixed-use construction in the Columbia market.

Market trends suggested that ground floor retail, mid-rise residential (market rate and affordable), office and parking would all find demand downtown, but that underwriting for a significant mixed-use project may require significant subsidy or increased land area to mitigate costs of vertical construction.

Given the strength of real estate uses in the downtown area and the position of the site relative to key activity hubs, the following three potential redevelopment alternatives were evaluated in the context of the CMCOG RITC Site:

- **Scenario 1:** Near-term real estate uses at the site could include government or other non-market rate driven-office, ground floor service retail, and parking. Note that new speculative office development is not recommended for the site. There could be a scenario that considers a City-sponsored public-private partnership that would be attractive for office development.

- **Scenario 2:** Mid-term uses may include multifamily market rate rental over ground floor service retail, with preference for subsidized affordable/workforce rental product.

- **Scenario 3:** Long-term demand potential includes market rate residential and office pending absorption of existing projects currently proposed/planned/under construction and availability of public funding to subsidize the housing product.

Based on the results of the real estate market analysis and a test-fit of site capacity according to Wendel’s engineering planning and design evaluation, it is recommended that the near-term development strategy target approximately 435,000 square feet of mixed-use development including office, a public transit center, 155 units of multifamily rental housing, 571 shared-use parking spaces, and a nominal amount of ancillary retail to serve as an amenity to the Transportation Center tenants and visitors (7,200 square feet). A summary of the conceptual development program and assumed revenue targets is provided in the following Table 14.

<table>
<thead>
<tr>
<th></th>
<th>Square Feet</th>
<th>SF/Unit (Gross)</th>
<th>Units</th>
<th>Revenue Targets</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office</td>
<td>20,100</td>
<td></td>
<td></td>
<td>$24.00</td>
<td>Class A Columbia CBD, Colliers</td>
</tr>
<tr>
<td>Public Transit Center</td>
<td>10,500</td>
<td></td>
<td></td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td>7,200</td>
<td></td>
<td></td>
<td>$22.00</td>
<td>Class A Columbia CBD, Colliers</td>
</tr>
<tr>
<td>Multifamily Residential /1</td>
<td>155,400</td>
<td>1,000</td>
<td>155</td>
<td>$1.10</td>
<td>Average CBD/submarket ($1.38, $0.94)/SF</td>
</tr>
<tr>
<td>Parking Structure/2</td>
<td>242,000</td>
<td>350</td>
<td>571</td>
<td>$95.00</td>
<td>Columbia Parking Report, Colliers</td>
</tr>
<tr>
<td>Total Square Feet</td>
<td>435,200</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1/ Assumes rental product.
2/ Assumes 3 stories; $95/space/month.

Source: Colliers Market Insights - Columbia, SC, Q4 2016; Willdan, 2017
Table 14: CMCOG RITC Site Recommended Development Program and Target Revenue

The following section further tests the preferred development program against the financial feasibility factors of development costs and targeted project revenues.

Financial Feasibility and Economic Benefits

Introduction and Overview

To evaluate the potential financial feasibility of the proposed ancillary residential and commercial uses at the CMCOG RITC Site, the Wendel Team undertook a residual land value analysis.

In addition, an analysis of one-time economic benefits of the initial public and private investment CMCOG RITC Site was conducted. Due to the preliminary planning status of the transportation center redevelopment project, insufficient data is available to evaluate the potential impact from transit center operations; economic impacts from ongoing operations are therefore excluded from this analysis.

The financial feasibility and economic impacts analysis is based on the preferred development program detailed in the prior discussion including 435,000 square feet of mixed-use development on a 2.5-acre site including office, a public transit center, 155 units of multifamily rental housing, 571 shared-use parking spaces, and a nominal amount of ancillary retail to serve as an amenity to the Transportation Center tenants and visitors (7,200 square feet).

The financial feasibility and economic benefits analysis is structured to inform public deliberations regarding the return on public investment related to redevelopment of the transit center and CMCOG’s overarching goals:

- Foster economic sustainability in the Columbia, SC metropolitan area.
- Activate underutilized public property to diversify municipality revenues;
- Achieve the revitalization of the current Columbia Transportation Center through high quality mixed- or multi-use development activity;
- Attract private investment and development activity to Downtown Columbia;
- Promote economic opportunities, attract new business formation, and create permanent jobs.

To test the feasibility of the mixed-use development program concept and its ability to attract interest by a private developer/investor through a PPP or other Master Developer RFP process, the Wendel Team conducted an analysis to test the order-of-magnitude “Residual Land Value” or “Supported Investment” related to redevelopment of the CMCOG RITC Site. Following is a summary of financial feasibility findings, and a description of the methodology and approach to the analysis. The detailed assumptions and calculations supporting these findings are provided in the Appendix to this report.
Summary of Supportable Investment

In the following discussion, the financial feasibility of the preferred CMCOG RITC Site redevelopment program is evaluated assuming a minimum target return (hurdle rate) of 7.5%, a maximum target return (hurdle rate) of 15%, and an average target multifamily rental rate of $1.27 per square foot. Taking these development costs and revenue assumptions into consideration, the Residual Land Value Analysis (“RLV”) indicates that total project revenues at reversion (the year the project is stabilized) are estimated to be $38.32 million. Total estimated project costs for the commercial and residential components are estimated to be $33.88 million (excluding the cost of land, the public transit center, and parking). Assuming a targeted return on investment of $2.87 million (7.5% hurdle rate) to $5.75 million (15% hurdle rate), the maximum supported investment is $32.57 million (15% hurdle rate) to $35.45 million (7.5% hurdle rate). The residual land value per square foot is positive assuming the minimum target hurdle rate at $14.41 per square foot and negative assuming the maximum target hurdle rate ($-11.98 per square foot) indicating that the project would be considered financially feasible only if:

- Publicly subsidized land and parking costs;
- Minimum threshold multifamily rental rates of $1.27 per square foot; and
- The developer is willing to accept the lower threshold for return on investment of 7.5% as opposed to 15%.

<table>
<thead>
<tr>
<th></th>
<th>Min Return on Investment Target (7.5%)</th>
<th>Max Return on Investment Target (15%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Capitalized Market Value (Project Revenues) /1</td>
<td>$38.32 M</td>
<td>$38.32 M</td>
</tr>
<tr>
<td>Hurdle Rate</td>
<td>7.5%</td>
<td>15.0%</td>
</tr>
<tr>
<td>Required Return on Investment -ROI ($)</td>
<td>$2.87M</td>
<td>$5.75M</td>
</tr>
<tr>
<td>Maximum Supportable Investment (Revenue less ROI)</td>
<td>$35.45M</td>
<td>$32.571,227</td>
</tr>
<tr>
<td>Total Costs of Development Without Land</td>
<td>$33.88 M</td>
<td>$33.88 M</td>
</tr>
<tr>
<td>Residual Land Value (Maximum Supportable Investment Less Total Cost of Development Without Land)</td>
<td>$1.57 M</td>
<td>$(1.30 M)</td>
</tr>
<tr>
<td>RLV / Sq. Ft. of Site Area</td>
<td>$14.41</td>
<td>$(11.98)</td>
</tr>
<tr>
<td>RLV / Acre</td>
<td>$627K</td>
<td>$(522K)</td>
</tr>
</tbody>
</table>

1/ Assumes target multifamily rental rate of $127.
Source: ULI-the Urban Land Institute; Wendel Engineering; Willdan, 2017

Table 15: Summary of CMCOG RITC Site Private Development Financial Feasibility
Fiscal and Economic Benefits

To better inform justification for public investment in commercial and residential uses at the CMCOG RITC Site, the Wendel Team conducted a high-level fiscal and economic impact analysis of the preferred redevelopment program.

In addition to providing an important public transit amenity, the proposed redevelopment initiative will also serve to generate one-time and annual ongoing fiscal and economic benefits. This analysis examines the expected one-time and annual ongoing job creation, payroll and tax revenues from the construction phase of the project. Note that this analysis excludes the cost of providing any new public services as a result of the proposed CMCOG RITC Site redevelopment.

The following section provides a summary of the key assumptions and values necessary to estimate the net fiscal impact of each redevelopment scenario, including:

- Development program assumptions and related assessed values by use type
- Net new project-related residents and employees
- Fiscal revenues at buildout (stabilized year)

The inputs informing key assumptions are explained below.

If the CMCOG RITC Site were to be redeveloped according to the proposed development program, the combined public transit and private residential/commercial uses would require approximately $48.58 million in construction investment.

Assuming 60% of construction costs are attributable to construction materials, approximately $29.15 million of spending on construction materials could be expected to occur in the local and regional market.

It is estimated that the CMCOG project could be expected to generate approximately $19.43 million in construction wages (40% of total development costs). Assuming an average annual construction wage of $38,950, the project could be expected to create approximately 499 construction jobs (or 249 full-time equivalent construction workers assuming a 24-month construction timeframe).

Assuming a state and local tax rate of 8%, spending on construction materials could be expected to generate approximately $2.3 million in sales taxes (although the sourcing of materials is unknown and some portion of sales tax benefits are expected to occur outside the State of South Carolina).

<table>
<thead>
<tr>
<th>Development Costs</th>
<th>2025</th>
<th>2026</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cumulative</td>
<td>Year 0</td>
<td>Year 1</td>
</tr>
<tr>
<td>Mixed-Use/Commercial Development</td>
<td>$33,876,380</td>
<td></td>
</tr>
<tr>
<td>CMCOG RITC (Public Use)</td>
<td></td>
<td>$14,700,000</td>
</tr>
</tbody>
</table>

2025
2026
Cumulative
Year 0
Year 1
Central Midlands Regional Intermodal Transportation Center Feasibility Study

<table>
<thead>
<tr>
<th>Description</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Construction Investment (Hard Costs) /1, 2, 3</td>
<td>$48,576,380</td>
<td>$36,432,285</td>
<td>$12,144,095</td>
</tr>
<tr>
<td>Construction Materials / 4</td>
<td>$29,145,828</td>
<td>$21,859,371</td>
<td>$7,286,457</td>
</tr>
<tr>
<td>Construction Wages /5</td>
<td>$19,430,552</td>
<td>$14,572,914</td>
<td>$4,857,638</td>
</tr>
<tr>
<td>Total Construction Wages</td>
<td>$19,430,552</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Divided by Median Annual Construction Wage /6</td>
<td>$38,950</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Person Years of Construction Employment =</td>
<td>499</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Divided by Construction Years /7</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Average Annual FTE Construction Jobs</td>
<td>249</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Taxes from Construction Materials Purchases /8</td>
<td>$2,331,666</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1/ Construction value based on private mixed-use construction (excluding parking costs) + public CMCOG RITC costs (including parking structure costs).
2/ Year 1 construction (as % of total development costs)
3/ Year 2 construction (% of total development costs)
4/ South Carolina State Occupational Employment and Wage Estimates (May 2016)
5/ Construction materials as % of hard construction costs = 60%
6/ Construction wages as % of hard construction costs = 40%
7/ Assumed construction timeframe subject to change.
8/ NY State & Local Sales Tax Rate (Richland County) 8.000%

Source: RS Means Construction Cost Estimators; US Department of Labor; Wendel; Willdan, 2017

Table 16: RITC Commercial & Public Use Development (One-Time Construction Benefits)

In terms of ongoing operations, it is expected that the residential and commercial uses could generate approximately $26,000 in annual real property tax revenues and approximately $259,000 in state and local retail sales tax revenues.

The following Table 17 and Table 18 provide the detailed assumptions and calculations supporting these order-of-magnitude findings regarding the CMCOG RITC Site’s potential fiscal benefits.
Estimated Annual Real Property Taxes

$26,071

1/ Based on construction cost value, subject to adjustment based on real property assessment.

Source: Richland County Assessor; Willdan, 2017

Table 17: CMCOG RITC Fiscal Benefits – Annual Ongoing Real Property Taxes (Stabilized Year)

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<tr>
<th>CMCOG RITC Retail Uses</th>
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Source: City of Columbia, SC; Willdan, 2017

Table 18: CMCOG RITC Fiscal Benefits – Annual Ongoing Sales Taxes (Stabilized Year)

In terms of job generation, it is not expected that the multifamily, office and retail operations would be expected to generate substantial employment. First, multifamily operations do not tend to generate substantial employment activity (approximately 6 to 10 full-time equivalent jobs per project, depending on project size and amenities).

Likewise, the retail operations could be expected to generate approximately 1 full-time employee for every 450 square feet of retail, or 16 FTEs. The average annual retail wage is $35,700, with the potential to generate approximately $571,200 in new local payroll from retail operations.

Finally, the office component includes approximately 20,100 square feet. Assuming an industry average of between 250 to 500 square feet per office worker, the office component could be expected to house between 40 to 80 full-time office workers (depending on the industry and office space strategy of individual tenants). Given relatively high office vacancy rates reported in the Columbia, SC regional market, the analysis does not presume that developing office space necessarily equates to creating new office employment (as new space could be occupied by existing office workers relocating from older/obsolete space).

For those reasons, an estimate of fiscal and economic benefits generated by office worker payroll is expected to be in the range of $4.5 million (60 FTEs and $75,000 in annual payroll) but is not recommended to be included in ongoing fiscal benefits until a new build-to-suit office tenant is secured for the project.

Conclusion
The proposed CMCOG RITC Site redevelopment strategy includes approximately 435,000 square feet of mixed-use development including office, a public transit center, 155 units of multifamily rental housing, 571 shared-use parking spaces, and a nominal amount of ancillary retail to serve as an amenity to the Transportation Center tenants and visitors (7,200 square feet).

Based on the market findings in this analysis, if the project were to meet the conditions of feasibility outlined in this study, the project could potentially attract a private sector developer to enter into a PPP (land sale or long-term ground lease) to construct and operate the residential, office, and retail components of the project while achieving a minimum threshold return on investment of 7.5%.

The one-time construction activity and ongoing operations are anticipated to generate fiscal and economic benefits in the form of jobs, payroll and taxes that could justify public funding in infrastructure and public realm improvement components of the project.

**CONCEPTUAL PLANS FOR THE CENTRAL MIDLANDS REGIONAL INTERMODAL TRANSPORTATION CENTER**

**Initial Master Plan Site Concepts**

After identifying the program and the locally preferred site, the design team began to perform test fits on the preferred site. This process consists of preparing diagrams that show how different facility configurations the support the desired program will fit on a chosen site. The initial focus of the test fits was to look at the relationship between the large number of bus bays, safe pedestrian circulation, and the potential for Transit Oriented Development on the site. The design team explored multiple bus bay configurations and associated street level circulation patterns. Efforts were made to prepare site plan options that included bus bays located off of the city streets. Under such options, sawtooth bus slips along with bus circulation occupy the site’s interior and strategic access points are provided to the street frontage. Considerable space was necessary to accommodate the preferred twenty (20) bus bays with adequate bus and pedestrian circulation space. Additionally, priority was placed on cultivating pedestrian and bike activity while creating a strong street presence, specifically along Laurel Street and Sumter Street. The design team recognized opportunities along Laurel Street to integrate with future development and opportunities along Sumter Street to incorporate a possible commercial component.

Using these criteria, four (4) test fit options were developed for discussion. Diagrams were created that showed bus movement simulation using Auto Turn software. All of the bus movements in all of the options were analyzed to ensure the development of a transit center proposal that works for COMET bus turning radii, verifying the necessary space to create a safe and functional transfer center. In keeping with providing two bus circulation access points, the options explored Blanding Street and Sumter Street as the primary bus entry-exit point. Below are the test fit options that were discussed.
Three bus entry-exit points for dual bus islands - two located are located along Blanding Street and one located along Sumter Street

Sawtooth bus bay configuration accommodating twenty (20) buses, preferred for bus operations flexibility

Expansive street presence along Sumter Street, providing strong commercial component opportunity

Drop-off area located to the north of the project near the Laurel Street, providing easy pedestrian access to bus platform

Two platforms separate transit riders and require transferring between platforms at safe pedestrian crossing points.
Two bus entry and exit points for the dual bus islands - both located along Blanding Street, with an additional one-way bus entry point located along Laurel Street.

- Sawtooth bus bay configuration accommodate eighteen (18) buses, preferred for bus operations flexibility

- Pedestrian activity majority isolated to the perimeter of the bus circulation area. Two platforms separate transit riders and require transferring between platforms at safe pedestrian crossing points.

- Drop-off area located to the east of the project along Sumter Street, providing easy pedestrian access to bus platform
Figure 17: Test Fit Site Option C

- Two bus entry-exit points - one located along Blanding Street and one located along Sumter Street
- Sawtooth bus bay configuration accommodating eleven (11) buses, preferred for bus operations flexibility
- Expansive street presence along Sumter Street, providing a strong commercial component opportunity
- Large, central platform for pedestrian activity in the bus circulation area. Pedestrians do not need to cross bus traffic in this configuration.
- Drop-off area located to the north of the project along Laurel Street, providing easy pedestrian access to bus platform
- Two standard bays for Greyhound or quick-charge operations are located separately from the main bus island allowing further flexibility.
Figure 18: Test Fit Site Option D

- One primary bus entry-exit point located along Sumter, with an additional bus entry point located along Sumter Street and a bus exit point located along Blanding Street.
- Sawtooth bus bay configuration accommodating fifteen (15) buses, preferred for bus operations flexibility.
- Large, central platform for pedestrian activity in the bus circulation area. Two bus islands require transferring between platforms at safe pedestrian crossing points.
- Drop-off area located to the north of the project along Laurel Street, providing easy pedestrian access to bus platform.

Following a review and evaluation of the four (4) master plan site options by the Steering Committee, Option D was identified as the preferred option. This option emphasizes the large, central platform – allowing for accessibility and transferability between buses for pedestrians. Furthermore, the consolidation of pedestrian activity allows limited instances of pedestrian-
bus crossings. Additionally, this option offers the opportunity to construct the bus bays in phases, beginning with the inner circle and expanding with additional bus bays as necessary. The primary bus entry-exit points located along Sumter Street provide an opportunity for the Transit Center to become a prominent, visible part of the project, while still maintaining consistent building frontage along Laurel Street.

**Three Dimensional Studies for the Preferred Site Plan**

Moving forward with Option D, the design team developed three conceptual design options for the buildings. Each option included a site plan and conceptual three-dimensional massing images. This approach provided the Steering Committee the ability to visualize the full growth possibilities through massing, and allowed the design team to further study the relationships between parts of the project.

![Option 1 Conceptual Plan](image)

Option 1 seeks to actively relate to the surrounding neighborhood by focusing on traditional architectural forms and details. The simple geometries maximize views throughout the site. Particularly, the anchoring corners maximize street frontage and establish a strong street presence. The Laurel Street façade invites pedestrians into the Transit Center through a covered courtyard. Additionally, the courtyard provides safe access to the bus platform, controlling pedestrian crossing points. In keeping with the surrounding neighborhood, the facades employ brick masonry with concrete accents. Window lintels, rectilinear shapes, and pronounced columns contribute to the traditional forms; while, angled roof slopes and varying roof heights introduce a slight, modern touch. Figure 19 shows a perspective of Option 1 looking at the corner of Sumter Street and Laurel Street.
Option 2 aims to capture the site’s inherit activity and movement through employing modern forms and architectural elements. The design utilizes strong angles and layered planes to form compelling spatial arrangements, to introduce natural light into the interior of the site, and to create opportunities for green spaces. A terraced bridge over the Sumter Street bus entry-exit point undulates, opening the facade, showcasing the bus activity beyond. Further, the Laurel Street façade rises, providing pedestrian access to the Transit Center. Figure 20 shows a perspective of Option 2 looking at the corner of Sumter Street and Laurel Street.
Option 3 utilizes multiple scales along with modern and historic architectural gestures to highlight the various programmatic spaces in the project. The design creates an open street level plan to introduce natural light into the interior of the site and to stimulate pedestrian activity from the street to move throughout the project. Additionally, the open street level plan allows views of the Transit Center and bus activity through the screen of the development along the street. The combination of traditional and modern elements remain sensitive to the established surroundings while motioning to the progressive culture of the city, a concept further conveyed through facades of brick masonry, metal panel, and wood accents. Figure 21 shows a perspective of Option 3 looking at the corner of Sumter Street and Laurel Street.

**Refinement of the Preferred Three Dimensional Conceptual Plan**

During a review and discussion of the three conceptual design options, the Steering Committee indicated a preference for Option 3. They preferred the approach of using traditional and modern elements to create an architectural expression of distinct programmatic spaces along with the convenient pedestrian access to the bus platforms along the Laurel Street façade.

However, a review of the three-dimensional studies by the City stimulated a re-evaluation of the test fit plan site option initially chosen, Option D. Particularly, the city wanted to re-evaluate the impact of the open street level and the bus entry-exit point located along Sumter Street. Concerns were raised for pedestrian/bike safety and potentially lost opportunities for street level development on the Sumter Street façade. Through further discussions, it was decided that bus activity should be less visible from the street and the addition of more commercial components should be explored. As a result of these discussions, the Steering Committee decided that street level development should be prioritized over maximizing the number of bus bays. The required number of bus bays was reduced from twenty (20) to fifteen (15). It was decided to generate final massing with a modified version of Site Option B.

Beginning with Master Plan Site Option B, the primary bus entry-exit point is located along Blanding Street, with an alternative exit located along Laurel Street. The eighteen (18) bus bays shown in Master Plan Option B is reduced to fifteen (15) to accommodate additional commercial space along Sumter Street. The reduction of bus bays allows for an increase in usable ground square footage for development along Sumter Street. The location of the Transit Center is along Sumter Street close to the corner of Laurel Street. The angled façades of the adjacent massing leads into the transit area. The massing of the proposed transit development allows for the incorporation of a four-story parking structure accessed from Laurel Street. The parking component is intended to complement the future City Hall development and further accommodate vehicle parking access. The pedestrian access to the bus platforms is along the Laurel Street and Sumter Street façades, as first shown in Master Plan Site Option D and as desired by the client.

The revised conceptual design distinguishes various programmatic spaces through definition of various masses while still offering a cohesive architectural gesture. The commercial component along Sumter Street conceals bus activity and activates the city’s pedestrian and...
bike activity. The additional commercial components include office, retail, and hospitality uses along Laurel Street and Sumter Street. A large residential component adds another layer of density over the parking garage.

The bus activity on Blanding Street reactivates the old greyhound station across the street. While, the alternative bus exit point located on Laurel Street acts as an architectural point of separation, creating two (2) three-story buildings of approximately 13,500 square feet/ floor and 6,600 square feet/ floor. The façade is imagined as a composition of brick, metal panel rain screen, wood, and glazing.

The Transit Center is a two-story structure with approximately 10,500 square feet/ floor and located on along of Sumter Street near the corner of Laurel Street. It bridges between the various programmatic spaces while providing a covered entry to the bus platform. The two-story mass is envisioned as a glazed exterior with a large, angled relief offering a modern element without compromising the integrity of the Sumter Street façade.

Garage parking, located above the bus bays, allows maximum circulation on the street level. Parking is anticipated to be used by the future City Hall development, nearby businesses, and surrounding commercial components. The mass accommodates three levels of parking, totaling approximately 242,000 square feet/ floor.

In response to the Steering Committee’s desire for a residential component, the revised conceptual design incorporates residential programmatic space above the parking levels. The residential component addresses the street with a lobby on the corner of Sumter Street and Blanding Street, and grows to address both street facades. The “U” shape design provides an opportunity for a private pool area or outdoor green space on the interior of the site, away from street activity. The associated residential massing steps back to provide relief to the façade and opportunities for terraces and green roofs. The mass totals five stories, approximately 155,400 square feet/ floor, and incorporates wood details into the exterior façade, in addition to masonry and metal panel. The final conceptual site plan is shown below in Figures 22 through 27.

Another important aspect of the design of the Transit Center will be wayfinding and signage for the facility. Information must be provided for pre-trip planning and on-route as well. This information will inform the traveler of the location, schedule and real-time status of the services, as well as an understanding of the amenities and services that are offered in each part of the intermodal center. Information for the user will be located at several locations and cover all modes. The design approach to signage and wayfinding will be two-fold: (1) Signs will be used to orient people only when absolutely necessary. Architecture, architectural symbols, streetscape, and clear unobstructed sightlines between destination points will be the backbone of a wayfinding system. (2) The wayfinding/signage system will be inclusive and should employ graphic symbols as well as lettering and directional arrows. In final design, historic sites and major regional destinations should be folded into the wayfinding/signage system along with the multiple transportation modes. Preliminary wayfinding and signage plans are shown in Figures 28 and 29.
Figure 22: Regional Transportation Center Conceptual Site Plan – Base Program
Figure 23: Regional Transportation Center Conceptual Site Plan with TOD – 1st Level
Figure 24: Regional Transportation Center Conceptual Site Plan with TOD – 2nd Level
Figure 25: Regional Transportation Center Conceptual Site Plan with TOD – 3rd Level Up
Figure 26: Regional Transportation Center Conceptual Plan with Full TOD Buildout
Figure 27: Regional Transportation Center Conceptual Plan with Full TOD Buildout
Figure 28: Regional Transportation Center Conceptual Plan Signage

DESIGN OPTION ONLY – NOT FINAL DESIGN
Figure 29: Regional Transportation Center Conceptual Plan Signage Detail
Conceptual Level Construction Cost Estimate for Transit Components Only

For use with DOT project programming, the Wendel Team prepared an order of magnitude cost estimate for the transit components only of the conceptual design. The estimate was prepared using real data including labor and material costs from the Central Midlands region to accurately reflect actual construction estimates. Because the design is at a very early stage, we include contingency costs on many components of the estimate and calculate an expected inflation factor. Including these estimating variables early in the costing cycle, provide more realistic requirement for funding accrual and avoid “Sticker Shock” when the project goes to construction.

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Table 19: Conceptual Level Construction Estimate for the Regional Transportation Center
The transit components included in the construction cost estimate encompass all site work, construction of bus bays and ingress/egress to the site, canopies over the bays and the Transit Center building. The estimate was based on a Transit Center occupying the site with only the facility, bus bays, ingress and egress as shown in the conceptual site plan (Figure 22). Canopies over the bus bays were included in the estimate since a transit only facility would not have a parking facility over the bus bay area. Not included in the estimate are the TOD portions shown in the conceptual plan as retail space, office space, residential space and the parking structure. Land acquisition cost are not included in the construction cost estimate.