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# Friendly Avenue Area Plan

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December 6, 2016



DRAFT



Planning Department  
City of Greensboro

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Tony Wilkins

### Planning

Sue Schwartz, FAICP  
Hanna Cockburn, AICP  
Russ Clegg, AICP  
Dana Clukey, AICP  
Hart Crane  
Jeff Sovich, AICP  
Von Patrick

### Parks and Recreation

Mike Simpson  
Cathy Kates  
Madeleine Carey

### Transportation

Chris Spencer, PE  
Tyler Meyer, AICP  
Craig McKinney  
Tram Truong, GISP  
Daniel Amstutz

### Water Resources

Virginia Spillman, PE  
Jeremy McCall, PE

### Public Safety

Brandon Inscore

### City Manager's Office

Jim Westmoreland, PE, City Manager  
David Parrish  
Chris Wilson  
Barbara Harris

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# Section 1: Introduction

## Executive Summary

In September 2015 City Council requested a plan for a section of the Friendly Avenue corridor from Elam Avenue to Holden Road. Designated as an Activity Center in *Connections 2025*, Greensboro's Comprehensive Plan, the Friendly Avenue Study Area has seen an increased rate of change and development since 2000, including major expansions of Friendly Shopping Center and Wesley Long Hospital. The purpose of the Plan is to identify and address concerns about the impacts of future growth on surrounding neighborhoods, help inform the public conversation about the area's future, and to see if existing City facilities are effectively serving the area. The shopping center is a major retail destination with a variety of unique stores not found elsewhere in Greensboro, and is one of several features in the study area that draws people from across the county.

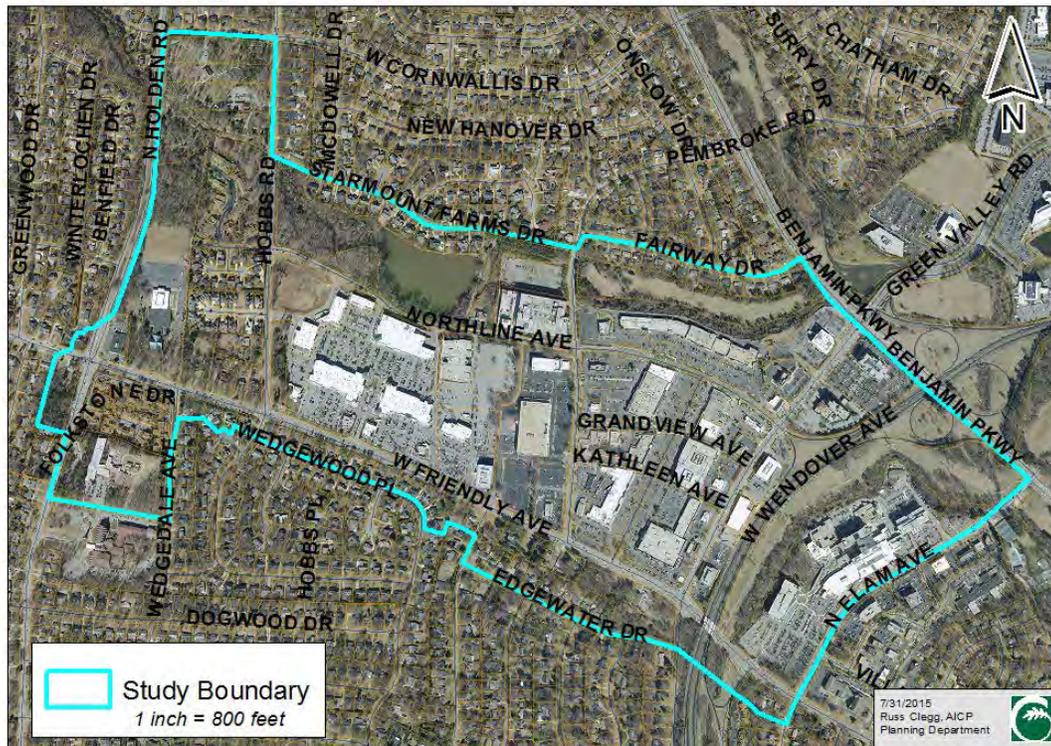
The recommendations in this plan are based on an extensive study of the existing conditions in the area, plans for future improvements by the City and property owners, and extensive input from adjacent neighborhood residents and business interests. Neighborhood input was collected at well attended public meetings and in online surveys with high response rates; here are some of the key findings of the report.

## Key Findings Summary

- **A regional draw.** The study area has assets that serve the entire city, including several regional parks and retail that draws customers from across the county. It is likely that the study area will continue to attract investment due to its demographics, the success of the current retail stores and the level of road access. The managers of current commercial property are not planning to expand their footprints, but it is possible that others may try to rezone property due to the economic opportunity.
- **Stable neighborhoods.** The neighborhoods around the study area are stable, and largely composed of detached, single-family houses. Survey responses gave high positive ratings to both the commercial areas and the stable neighborhoods, but also expressed concerns about residential properties changing to commercial uses and the effect this could have on neighborhood integrity. As one survey response stated, they do not want the "tentacles" of commercial development extending into their neighborhood. Since it is not possible to prevent a property owner from asking for a rezoning, the plan's recommendations provide structure for public discussion and review of new rezoning requests in addition to recommending that new development be focused into areas that are already commercially developed.
- **Excellent road access.** Several major roads serve the study area, giving much of the city quick access to shopping, services and parks. Some residents and business owners shared concerns about the capacity of area roads if the area continues to grow.

- **Bicycle and pedestrian demand.** Several bike and pedestrian trails are found on the periphery of the study area. The area sees high bus ridership, but pedestrian access throughout the study area is difficult due to the major roads around the center, some elements of the road design, and an inconsistent sidewalk network.

## Friendly Avenue Corridor Study Boundary



### At a Glance

- The study area covers 397 acres
- The shopping center contains over 1.35 million square feet of retail space
- There are 155 households in the study area with a population of 290
- The predominant land uses in the study include 116 acres of commercial property and 82 acres of parks and open space

## Vision Statement

A vision statement was created from responses to the initial online survey and meetings, then refined with comments from a second survey and public meeting. This vision helps focus plan implementation and will serve as a touchstone in cases where plan amendments are considered.

*The Friendly Avenue corridor is home to regional attractions that are also assets to the adjacent residential neighborhoods. Residents can easily drive, walk or bike to the parks, stores and churches in the area. The area features significant parks, open green space, a healthy tree canopy, and is surrounded by well-maintained neighborhoods. Local residents are engaged and informed about activities and future plans for the area and have an effective voice.*

## Recommendations Overview

The plan's recommendations provide strategies to build on the area's strengths and mitigate some of the areas of concern identified during the process.

- **Access**, a holistic look at transportation issues including strategic improvements to major roads, improving pedestrian and bike access, and protecting adjacent residential streets from high-speed cut-through traffic.
- **Land Uses**, with a focus on preserving neighborhood integrity and stability and encouraging denser development in land that is already commercial. As it is not possible to prohibit rezoning requests, the plan does include a more thorough process for rezoning proposals that are not consistent with the Generalized Future Land Use Map (GFLUM). This process, similar to those in other adopted small-area plans, reflects the high level of public input and study that was used to make the GFLUM recommendations.  
This area will continue to experience market pressure. The parts of the study area most likely to change do have a number of development constraints that could be overcome if the market demand becomes strong enough. The plan recommends further conversations with residents and other area stakeholders to determine what types of development may be acceptable at the southwest corner of Friendly Avenue and Holden Road and on the southern side of Friendly Avenue between Green Valley Road and Avondale Drive. This will occur no later than five years after plan adoption or sooner if market forces warrant.
- **Communication**, to ensure resident's continued ability to participate in public decisions and be informed about area events and land use changes. For the recommendations in the Access section, it will be important for area residents to initiate conversation with the Departments of Transportation, Parks and Recreation and Planning to study individual streets and intersections for possible improvements, and to pursue implementation of BiPed strategies.

## How to Use This Plan

The plan focuses on a section of Friendly Avenue between Elam Avenue and Holden Road in the context of adjacent neighborhoods. This plan is intended to guide decisions by City staff, the community, City Council and other decision-making bodies when allocating resources for transportation improvements, considering zoning cases, and other issues that affect quality of life and development in the area.

Many of the recommendations will require further study to be carried out; the adoption of this plan represents the City's intent to work on these issues as the plan is implemented. In addition to implementing the plan, the City will consider changes in land uses, the transportation network and other relevant facts in and near the study area as the plan is implemented. Since market forces will continue to exert development pressure on the area, the City will revisit the plan in no less than five years, in 2021, or sooner if market forces warrant.

## Rezoning

A future rezoning request that is not consistent with the plans adopted Generalized Future Land Use Map will be considered an amendment to this plan. The amendment process and the rezoning process are described below as well as on page 16 in the Land Use section of the recommendations.

## Amending the Plan

Amendments to this plan should not be made without consideration and feedback from the surrounding community. They should include an analysis of immediate needs, long-term effects, and implications the amendment may have on other parts of the plan.

The land use recommendations in this plan represent an amendment to the Generalized Future Land Use Map as found in the City Comprehensive Plan, *Connections 2025*. If a proposed rezoning is found to be inconsistent with these GFLUM designations, the following procedure will be followed to consider amending the plan. This process is similar to those found in other small-area and neighborhood plans adopted by City Council and is consistent with the process used to amend the GFLUM. It reflects the more detailed public input and study that established the future land use expectations in these areas.

- The City will advertise and conduct a public meeting in or near the study area in coordination with the applicant to review the proposed change with residents.
- The Planning Board must hold a public hearing and make a recommendation on the proposed plan amendment to City Council.
- After the Planning Board hearing, the Zoning Commission will hold a public hearing and make a recommendation to City Council on the proposed rezoning.
- City Council will hold a final public hearing and make the final decision on any plan amendment and associated rezoning.

## Summary of Existing Conditions

The first stage of this planning process was to thoroughly examine the area, including its history, demographics, city facilities, land uses and other pertinent features. More details are found in the Background section starting on page 21.

### *History*

- The study area was annexed into the City in the 1950s
- Over the past 20 years, the area experienced more intense development:
  - The O. Henry Hotel opened in 1998
  - The Regal Greensboro Grande Stadium 16 movie theater opened in 1999
  - Friendly Center expanded along Northline Avenue by 18,000 square feet in 2002
  - Wesley Long Hospital became part of the Cone Health System in 1997
  - In 2012, a 29,000 square foot emergency department was added
  - The Shops at Friendly Center opened in 2006 with a building footprint of 420,000 square feet in a 34 acre expansion

### *Demographics*

- There are few residences in the plan's study boundary. For demographic analysis data was used from an area that captures houses within a 5-minute drive of the intersection of Friendly Avenue and Pembroke Road.
- There is less diversity in the area used for demographic analysis than in the City of Greensboro as a whole
- The area used for demographic analysis has a higher percentage of advanced degrees, employment, and higher income than the City of Greensboro as a whole
- Retail in the study area attracts shoppers outside the five-minute drive time, particularly in clothing and food retail segments.

### *Environment*

- Much of the study area is heavily developed non-residential uses, with significant impervious surfaces.
- The surrounding neighborhoods are largely made up of low-density residential housing with a mature tree canopy
- The study area is surrounded by a variety of parks, some of which provide connectivity to a network of City-wide trails and greenways

### *Land Use*

- Broadly, current land uses are in line with current zoning designations and with the Generalized Future Land Use Map
- The study area is built out, with few vacant lots
- Though primarily commercial, the study area contains a significant variety of institutional uses
- The shopping center, hospital, parks and churches serve the local community but are also destinations for the region
- Demographics and transportation assets suggest that the area could draw additional development, but there are no strong indications of particular locations likely to be redeveloped

### *Transportation*

- Pedestrian access in the shopping center has improved, but is not consistent
- Plans are underway to improve several key intersections
- The area has the potential to be a hub in the Greenway network

### *Public Safety*

- The predominant types of crime in the study area are in keeping with the largely commercial land uses
- Compared to Greensboro as a whole for the time period studied:
  - Overall, the study area has a low crime rate
  - The study area accounts for about 1% of all reported crime in the City

## Public Input

The Planning Department opened an on-line survey to collect public comments for the Friendly Avenue Corridor Study on November 18<sup>th</sup>, 2015. The survey was distributed by mail, email and neighborhood listservs. A total of 324 responses were received. Questions included

- Where residents lived in relation to the corridor,
- What are the corridor's assets, threats and opportunities,
- The importance of pedestrian connections,
- Specific concerns about growth,
- Area activities that would be of interest to residents.

After reviewing the responses, staff identified general categories of responses which were used to create the recommendations. The aggregated results from the online survey and the first meeting are included at the end of this report; here are the key findings from the survey.

## Key Findings

- More than half of the respondents live inside or near the corridor and/or live within one mile of the study area (55.6% and 69.6%)
- The Shopping Center was identified as the greatest asset within the corridor (50.5%) while traffic is viewed as the greatest threat (43.9%)
- The biggest concerns were increased traffic (52.1%) along with the encroachment of commercial development into residential areas (21.5%)
- Traffic congestion (51.8%) and commercial development (41.9%) were seen as the two most important issues facing Friendly Avenue over the next five years
- Transportation improvement options are seen as the greatest opportunity for the corridor (39.2%)
- The vast majority of respondents indicated they would take advantage of improvements that make it easier to walk or bike to the commercial area (76.1%)
- Music Events (19.9%) and Park Activities (19.2%) were identified as appealing future activities

A public drop-in meeting was held on February 23<sup>rd</sup> at First Lutheran Church near the corner of Holden Road and Friendly Avenue. Attendees had the opportunity to make comments on the same questions as above, review information in the Existing Conditions Report; make suggestions and comments about transportation issues on a map, and talk with City staff about any concerns. Meeting comments were consistent with survey responses.

A draft set of recommendations was posted online and distributed to the public for comment from early August through the first week of September. A second public meeting was held on August 18<sup>th</sup> for the purpose of reviewing the recommendations. Public comments were used to refine the suggested recommendations.

## Section 2: Recommendations

The recommendations in this plan are based on the public input received in meetings and in online surveys, the study of conditions in the area, and existing City plans for roads, sidewalks and trails. The recommendations cover three broad areas: access, land uses and communication.

### Recommendations: Access

**Goal:** Maintain a safe and efficient road network with safe access for pedestrians and cyclists while protecting adjacent neighborhoods from excess non-local through traffic.

#### *Addresses Identified Concerns*

- Lack of ability to safely walk or bike to or in the commercial area
- Increasing traffic congestion on main roads
- Spillover traffic onto residential streets

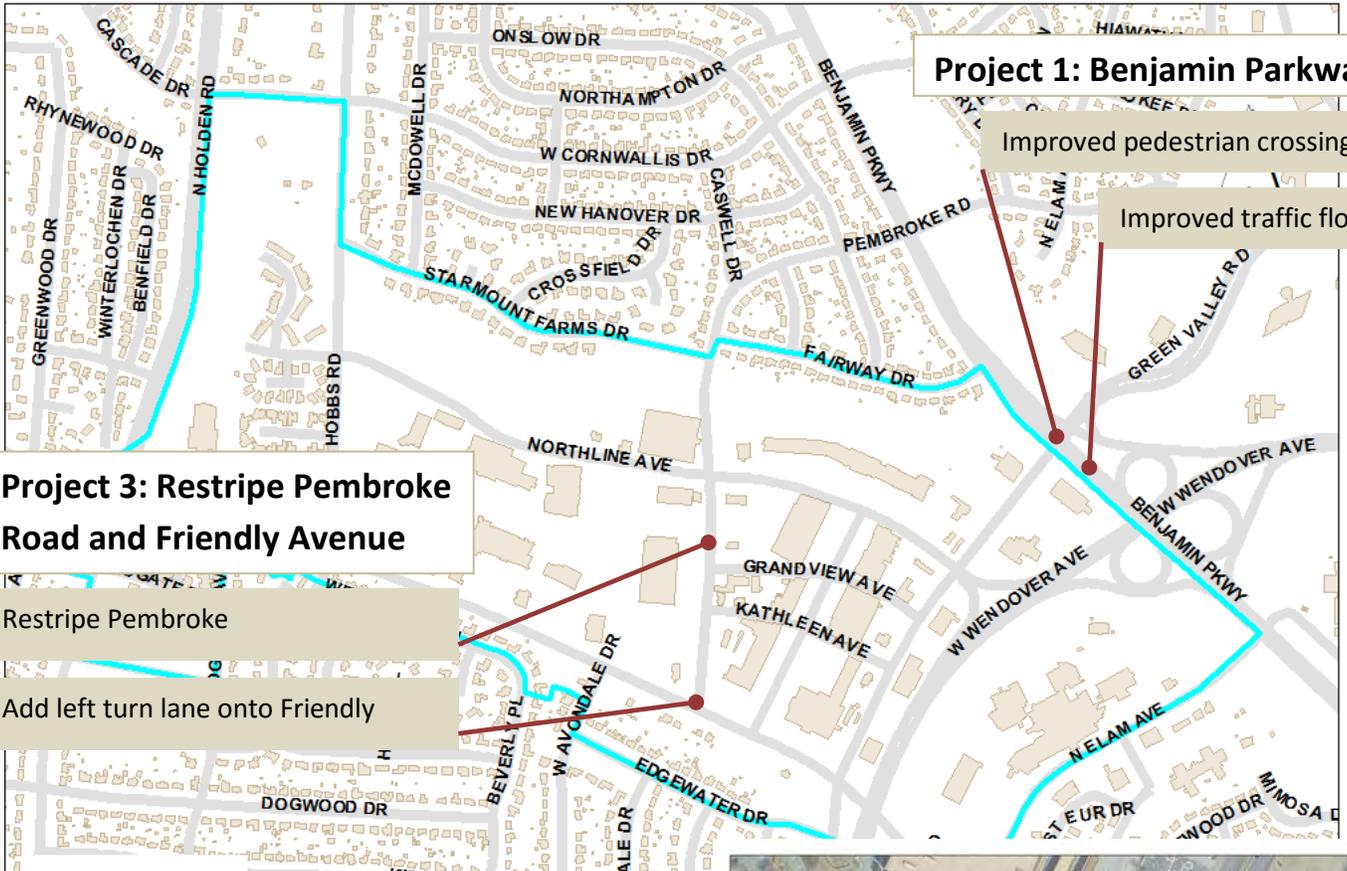
#### *Analysis*

Part of the economic success of the study area is due to relatively easy access afforded by several major roads including Friendly Avenue, Wendover Avenue, Benjamin Parkway and Holden Road. The 10-minute drive time from the center of the study area covers almost the entire city. The study area is also served by several trails and greenways that have regional connections, including the A&Y Greenway. The potential exists for the study area to provide improve connections between these trails. Residents also expressed strong support for providing better pedestrian and bicycle access to the commercial areas.

#### *Recommendations: Capacity of major roads*

Continue the pursuit of three projects to maintain safe and efficient traffic flow and remove barriers to cyclists and pedestrians at key intersections:

- Improvements to turn lanes at Pembroke Road and Friendly Avenue (October 2016);
- Friendly Avenue from Lindell Road to just past Green Valley Road (Funding schedule will be released in the fall of 2016);
- Benjamin Parkway from the bridge over Wendover Avenue to Holden Road(Construction start in 2022).



**Project 1: Benjamin Parkway**

- Improved pedestrian crossings
- Improved traffic flow

**Project 3: Restripe Pembroke Road and Friendly Avenue**

- Restripe Pembroke
- Add left turn lane onto Friendly

**Project 2: Lindell Road and Friendly Avenue**

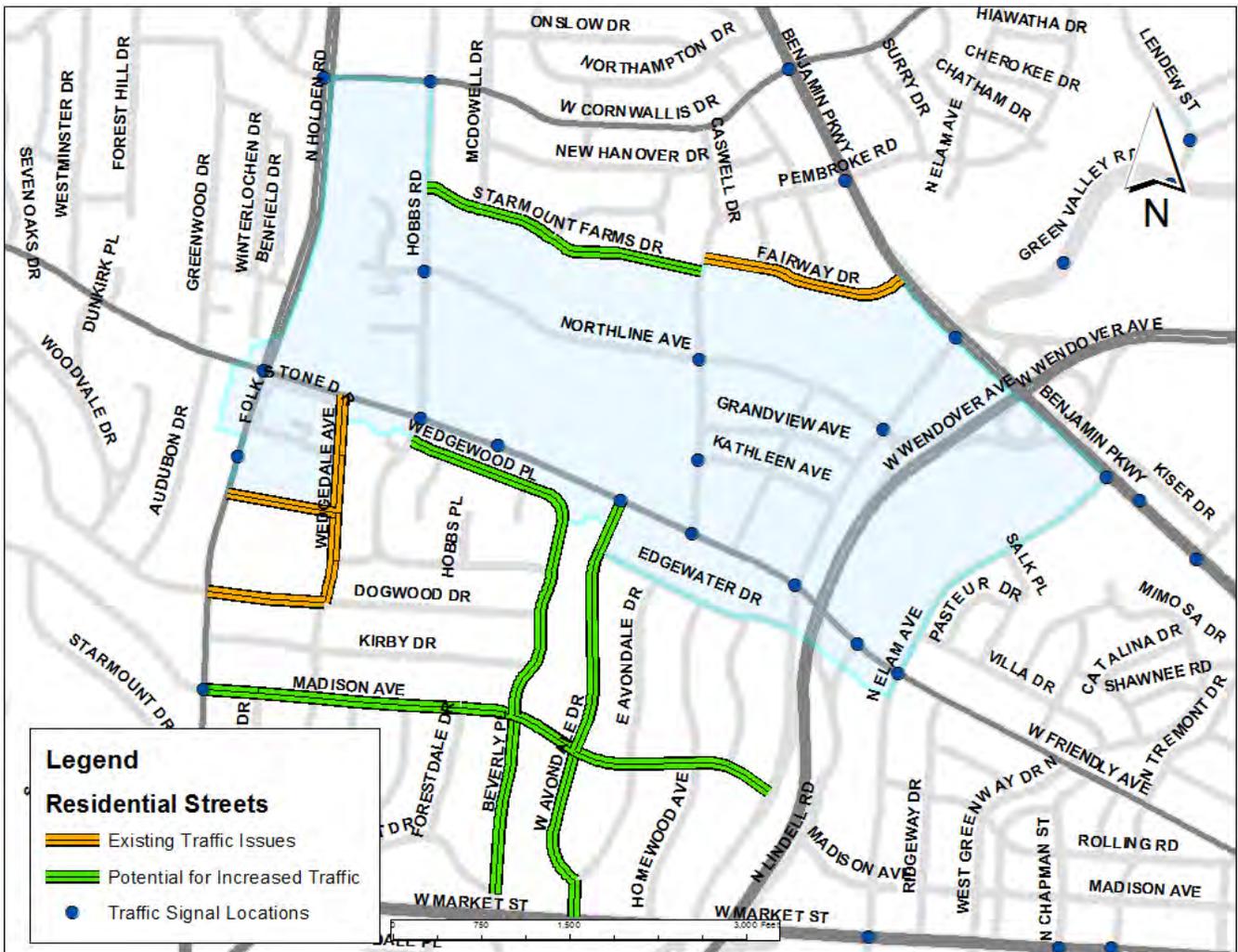
- Safety improvements at main entrance
- Removal of slip lanes for better bike and pedestrian access
- Improvements to Lindell intersection
- Longer left turn lane



**Recommendations: Residential Streets and Through Traffic**

The Department of Transportation will work with interested residents to manage traffic in their neighborhood to prevent negative impacts from non-local through traffic on residential streets such as speeding or excessive numbers of cars. In some instances, it may be feasible to introduce medians or other means of discouraging non-local cut through traffic. Analysis of individual streets was not in the scope of this planning process, but residents can follow up with GDOT to address specific concerns.

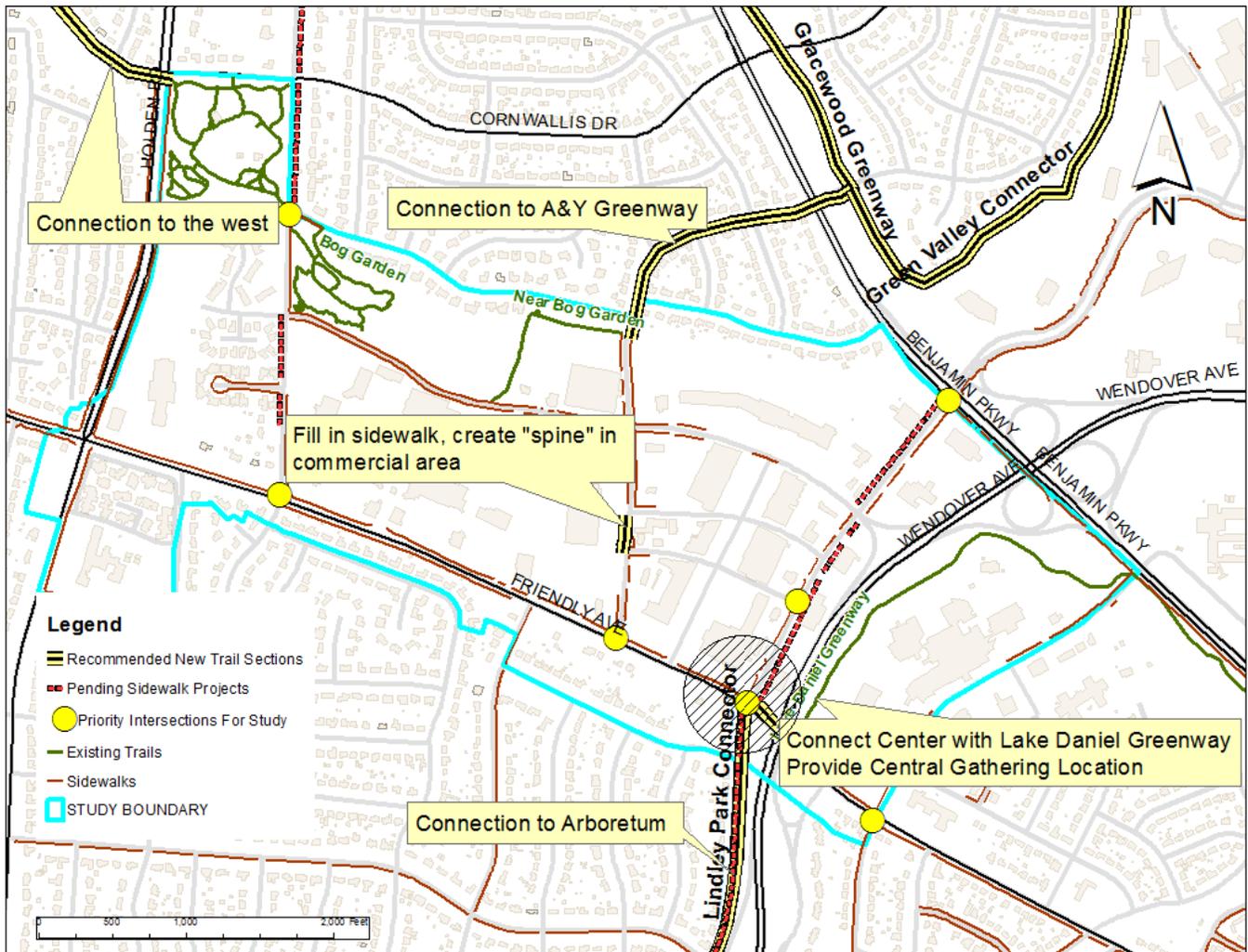
Except for roads in the commercial properties, the streets in and around the study area are public streets and are open for all to use. However, to avoid traffic lights and to avoid heavier traffic, some drivers may use local streets primarily designed to carry local traffic instead of thoroughfares. This can result in higher traffic speeds and heavier volumes than the streets were intended to handle, resulting in negative impacts for neighborhoods. Residents on Fairway Drive, Wedgedale Avenue, parts of Dogwood Drive and Christ Church Road report significant non-local traffic. Other streets may be vulnerable to increased traffic due to their location and connectivity as traffic volume increases in the area. It is important to consider that the streets function as one system; changes to one location may cause more traffic in other locations.



**Recommendations: Walking and Cycling**

These recommendations come from the 2015 Bicycle, Pedestrian, and Greenway Master Plan (BiPed) Update adopted in 2015. Implementation will depend on funding availability and ongoing conversations between neighborhoods and the City.

- Enhance pedestrian crossings at intersections identified as most problematic
- Connect the adjacent pieces of the regional trail system through the study area and to the commercial center
- Establish a central gathering space or hub for greenway users with items such as maps, fountains, or a bike vending machine
- Work with the Greensboro Transit Authority to ensure that bus stops are located at the most efficient locations and determine if more sheltered stops are needed
- Intersection studies can be conducted over the next 1 to 3 years; improvements to trails will be studied as part of the long-term implementation of the BiPed plan.



## Recommendations: Land Use

**Goal:** Maintain the integrity of adjacent neighborhoods as the corridor continues to evolve.

### *Addresses Identified Concerns*

- Impact of more intense commercial development on the quality of residential and commercial areas
- Possible expansion of commercial and multi-family developments into current residential neighborhoods

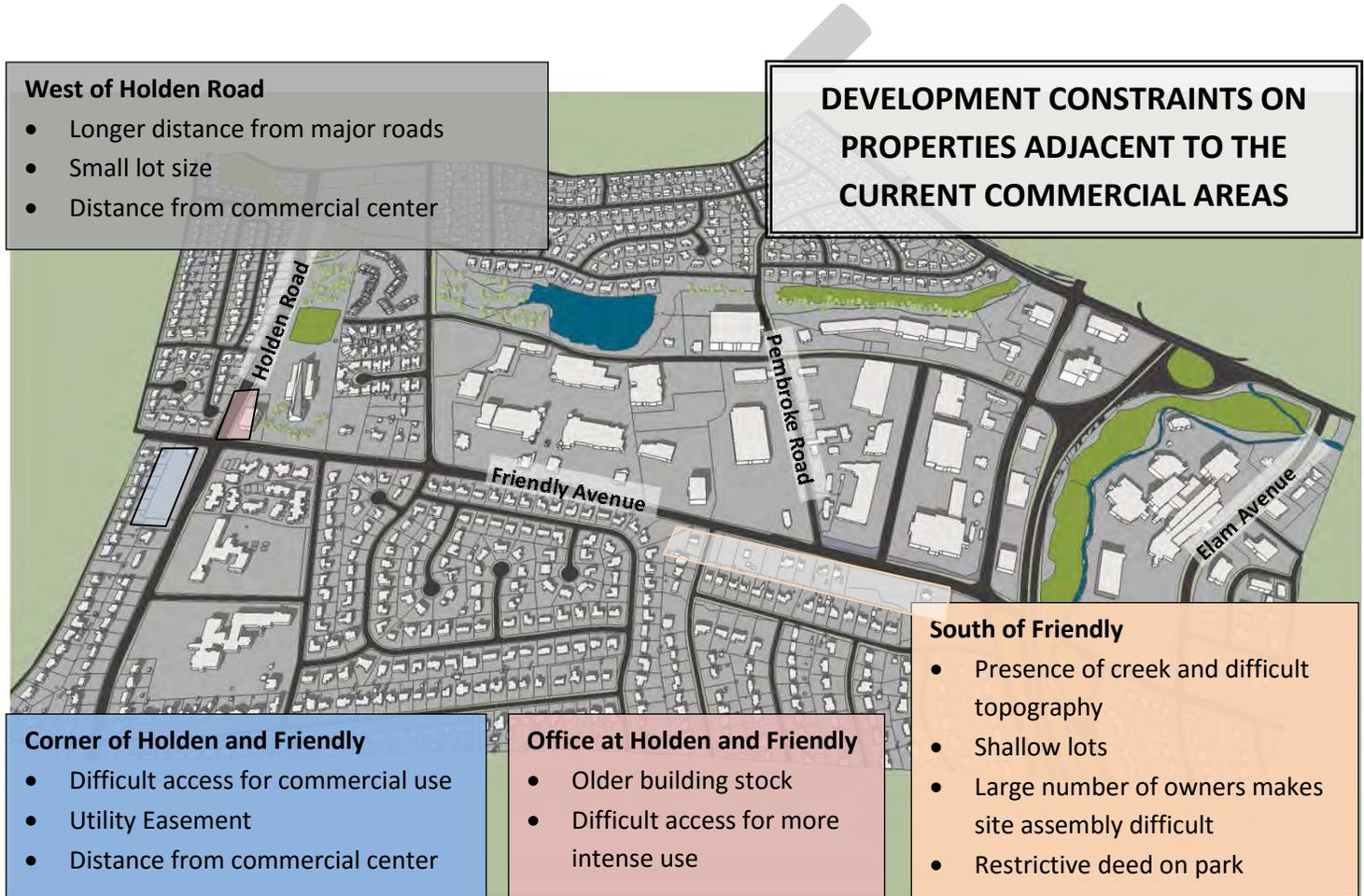
### *Analysis*

Public comments consistently expressed concerns about the possibility of residential property being rezoned for commercial development and the impact this may have on neighborhood integrity and quality of life. There were fewer concerns expressed about new development within the current footprint of commercial development, though there are concerns about managing potential impacts such as increased traffic.

Several factors were considered when developing the plan's final recommendations.

1. Current zoning and existing and planned land uses are consistent in the area. This means that any major change in land use will require rezoning. The Generalized Future Land Use Map (GFLUM), part of the *Connections 2025* policy document that helps guide rezoning decisions, is generally consistent with current zoning, with the exception of minor changes recommended on page 17.
2. Several areas are of particular concern to residents due to the potential to change from their current use and past requests for rezoning. In conversation, developers expressed that these sites have development constraints that will make them more difficult and expensive to develop, when compared to sites in other locations.
  - Parcels south of Friendly Avenue between Green Valley Road and Avondale Drive
    - The presence of a creek and severe topography
    - Lots are too shallow for a large investment
    - The large number of owners make site assembly difficult
    - A deed restricts the use of the parcel at Friendly Avenue and Green Valley Road to open space
  - The southwest corner of Holden Road and Friendly Avenue
    - Due to the volume of traffic and the configuration of the intersection, it would be difficult to create a point of access for a high traffic commercial use.
    - There is a utility easement on the southern portion of the property.
    - The site is farther from the nexus of roads and commercial property that drives development pressure in the area.
    - The site is farther from the nexus of roads and commercial property that drives development pressure in the area.
  - The northeast corner of Holden Road and Friendly Avenue
    - Already in use as an office

- The building is older and it may be more economically feasible to redevelop with a new building
  - Property on Friendly Avenue west of Holden Road
    - This area is farther removed from major road access and the retail center
    - Multiple residential lots and owners would make site assembly difficult and expensive
- 3. Owners of the areas now under commercial development are not currently interested in expanding their footprint, though they may add to or change the mix of uses.



*Considerations of Development Pressure*

The study area is economically successful and surrounded by major roads that give it excellent access from across Greensboro and the region. These factors indicate that the area is likely to see continued interest from retailers and development pressure. The plan’s recommendations try to reconcile the growth pressure in the area with the long-term stability of adjacent neighborhoods.

### *Recommendations*

- Focus new development and a greater mix of uses onto land already commercially developed including increasing density and possible vertical development.
- Design new development to match and not disrupt the surrounding community.
- Conduct workshops within the community to better inform future conversations about rezoning following plan adoption. Workshops should focus on possible uses and design elements for parcels along Friendly Avenue between Green Valley Road and East Avondale Drive, with the results added to this plan as an appendix.

Specific recommendation for amendments to the Generalized Future Land Use Map (GFLUM) and the rezoning process for requests that are not consistent with the GFLUM can be found in the next sections of the plan.

### *The Generalized Future Land Use Map*

**What it is:** Part of Greensboro's Comprehensive Plan and a policy guide for decision-makers when considering changes to zoning and other land-use issues

**What it does:** Show the general types of development that the community has said is appropriate

**What it does not do:** Regulate the use of land

When originally adopted, the boundaries between GFLUM designations did not follow parcel lines or roads, as they broadly depicted development patterns across the entire City. The more detailed study in this plan results in GFLUM designations that do follow established boundaries and align with current zoning. Because of the study and public input used in making these changes, rezoning requests that are not consistent with the GFLUM receive a higher level of review and public input as outlined in the zoning recommendations.

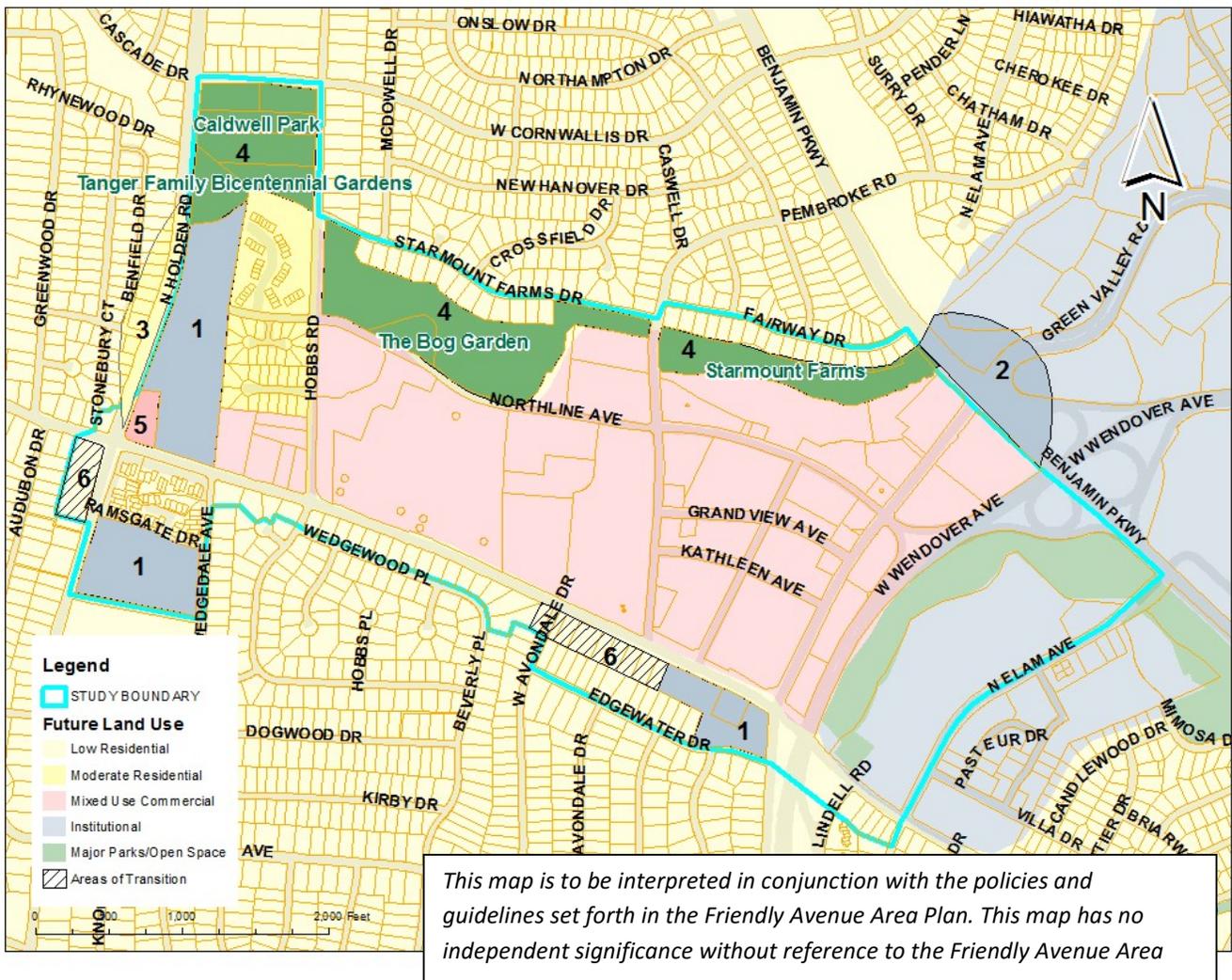


**Recommendation**

Amend the Generalized Future Land Use Map to more accurately reflect stable land uses. Changes include:

1. Designating First Lutheran Church, Sternberger Elementary and the Junior League offices as Institutional
2. Adjusting the boundary of Mixed Use Commercial to the western side of Benjamin Parkway by extending the existing Institutional designation
3. Changing the Moderate Residential on the west side of Holden Road to Low Residential
4. Designate existing parks as Major Parks/Open Space
5. Designating the existing office building at the corner of Holden Road and Friendly Avenue as Mixed Use Commercial, which is compatible with office, small multi-family residential and commercial
6. These are areas of transition that are likely to see development pressure though site constraints will impact development. Refer to recommendations on page 13 and 14 for further details.

**Proposed Future Land Use Map Amendments**



*This map is to be interpreted in conjunction with the policies and guidelines set forth in the Friendly Avenue Area Plan. This map has no independent significance without reference to the Friendly Avenue Area*



## Recommendations: Communication

**Goal:** Be deliberate in communication efforts to make sure that residents continue to have a voice in City processes and are aware of activities and changes.

### *Addresses Identified Concerns*

- Residents' ability to take part in decisions effecting development
- Improving communication on issues in the commercial area

### *Analysis*

The high level of public engagement in recent rezoning public hearings and in this planning process are evidence that the neighborhoods adjacent to the Friendly Avenue study area are well organized and have a good communication network. However, it was also clear from comments that there could be better understanding of the rezoning process and that residents want to maintain good lines of communication on events happening in the area. Currently, media such as Nextdoor and SurveyMonkey are useful for tools for engagement and participation, but this will change over time as technology changes. It will take a conscious effort to maintain good communication channels. Some survey respondents wrote that increased awareness of events in the study area would help build stronger community connections.

### *Recommendations*

Keep an open line of communication between the City and neighborhoods adjacent to the corridor.

- The City will maintain a list of active neighborhoods, neighborhood leadership, and stay current with the technology being used to communicate.
- Residents should continue to keep an active communication network that includes area institutions.
- The City will continue to engage with residents in close coordination with the Departments of Transportation, Planning and Parks and Recreation to pursue plan elements including intersection and trail improvements.

## Planning Process

### *Creation of Existing Conditions Report*

In the fall of 2015 Planning Department staff conducted an extensive study of the area and compiled the Existing Conditions Report.

### *Initial Survey and Meeting*

The City posted an online survey in November of 2015, which garnered over 330 responses. This input and the information in the Existing Conditions Report were used to design the first public meeting, held on February 23<sup>rd</sup> at First Lutheran Church on the corner of Friendly Avenue and Holden Road. Over 70 people attended the meeting. The survey was left open until April. A summary of the survey responses and comments from this meeting are listed in the back of this plan. Responses from the survey are available at [www.greensboro-nc.gov/friendlyave](http://www.greensboro-nc.gov/friendlyave).

### *Plan Recommendations*

City staff distilled survey and meeting responses and used them to craft a set of recommendations. These recommendations were vetted in another online survey in the summer of 2016, and reviewed in a second public meeting on August 18<sup>th</sup>. Although the Friendly Shopping Center was not a focus of the plan's recommendations, Planning Department staff conducted a door to door survey of businesses in the summer of 2016. These responses were largely consistent with those of the broader public. Responses from the survey are available at [www.greensboro-nc.gov/friendlyave](http://www.greensboro-nc.gov/friendlyave).

### *Final Draft*

The recommendations were edited to reflect public input, and a final draft of the plan released to the public with an online survey in October of 2016. The survey received 28 responses. City staff also spent the day at Caribou Coffee in the shopping center to offer the public the chance to have "Coffee With a Planner" and provide feedback on the Plan; six people took dropped in to review the plan.

### *Planning Board Public Hearing*

On October 19<sup>th</sup> the Planning Board held a public hearing at which two people spoke in support of adopting the plan. A letter from Brad Rogers, manager of the Friendly Shopping Center, was read into the record thanking the City for working with the community during this process. Comments from speakers included the following:

- The plan would be a tool to guide development decisions and infrastructure investments.
- Facilities for cyclists and pedestrians need to be improved and bus shelters added to reflect the high volume of bus ridership in the area.
- The process for amending the plan in the case of rezoning requests that were not consistent with the plan's recommendations is not clear and should not be longer than the current process.

- The GFLUM categories on property on Friendly Avenue between Green Valley Road and Pembroke Road should be revisited

The Planning Board asked questions and had comments about several aspects of the Plan

- Whether the existing parking in the Shopping Center is sufficient for future growth, and how the plans emphasis on making it easier to access without a car would help in this regard.
- A review of the process used to determine the GFLUM recommendations.
- A review of the process for rezoning requests which are inconsistent with the plan.
- The Plan's recommendations to address concerns about commercial encroachment into residential areas.
- Details we may know now about improvements to Friendly Avenue, which are still being developed.

The Planning Board voted unanimously in support of a motion recommending that City Council adopt the plan. The Plan was edited to clarify the recommendations, and the final draft plan was forwarded for City Council consideration at the December 6, 2016 meeting.

# Section 3: Existing Conditions

## Area History

Historically, Friendly Avenue connected downtown Greensboro with the Town of Guilford College. The land between the two towns began to attract large-scale development interest in the decades of the 1900s. These development plans focused primarily on residential development with amenities including lakes, golf courses and extensive parks.

Small sections to the east of the study area were annexed in the 1920s, 1930s and 1950s. Friendly Shopping Center opened in 1957 as a commercial center serving residential areas recently built to the west. Greensboro annexed the shopping center and the Town of Hamilton Lakes in 1957 under an agreement that limited rezoning in the former town until 2007. Construction of Wendover Avenue as a multilane thoroughfare increased access to the center in the 1960s. By 1964, plans were in place to extend Wendover Avenue to West Market Street from Burlington Road in the east.

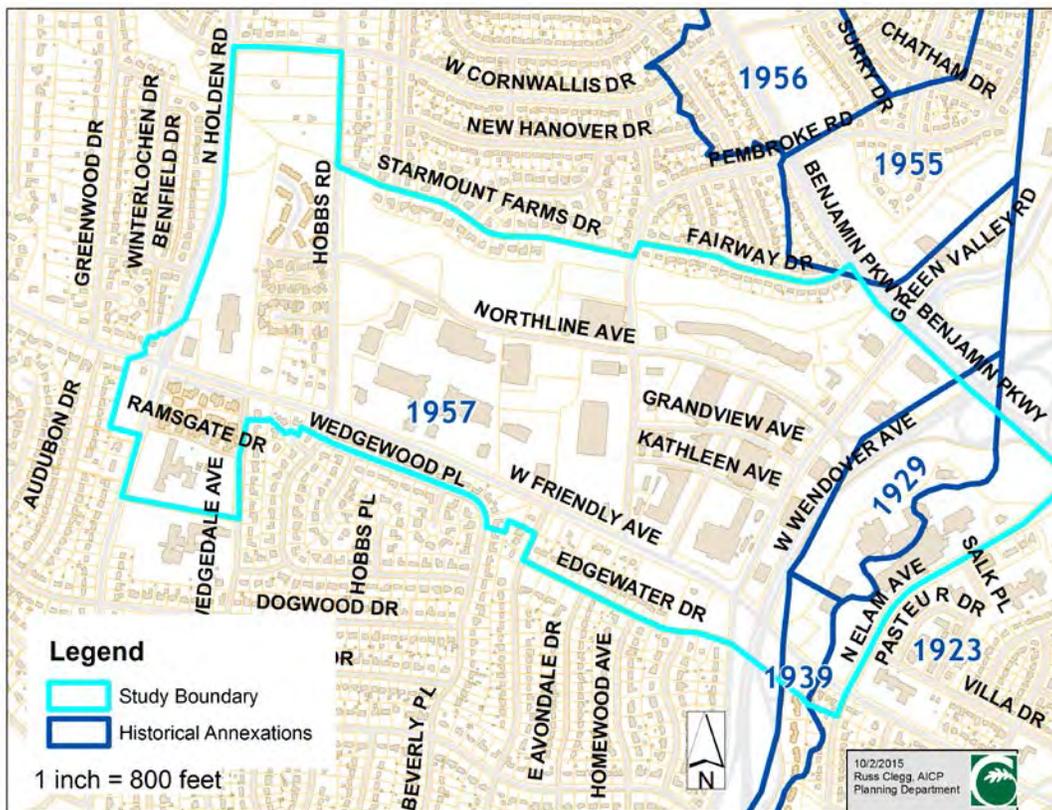


Figure 1: Annexation History

The area grew slowly over through the mid 1900’s with a mixture of residential, institutional and commercial uses. Sternberger School was built in 1949. Wesley Long Hospital opened on Elam Road in

1961. First Lutheran Church was completed in 1969. The neighboring office building at the corner of Holden Road and Friendly Avenue opened in 1979. Most of the nearby neighborhoods date to the 1950s and 1960s, though remain a few significantly older houses in the area.

Burlington Industries moved its headquarters to Friendly Avenue in 1969. During the 1990's the company endured significant financial losses and employee layoffs before filing for bankruptcy in 2001. With only 500 employees remaining, the company moved out of its headquarters building on Friendly Avenue in October 2004. The building was demolished on May 23<sup>rd</sup> 2005.

The commercial center expanded significantly in 2006 with the opening of the Shops at Friendly on property that had housed the Burlington Industries corporate offices, which almost doubled the footprint of the retail area. Wesley Long Hospital has also undergone extensive expansion within the last two decades.

### *Key Findings*

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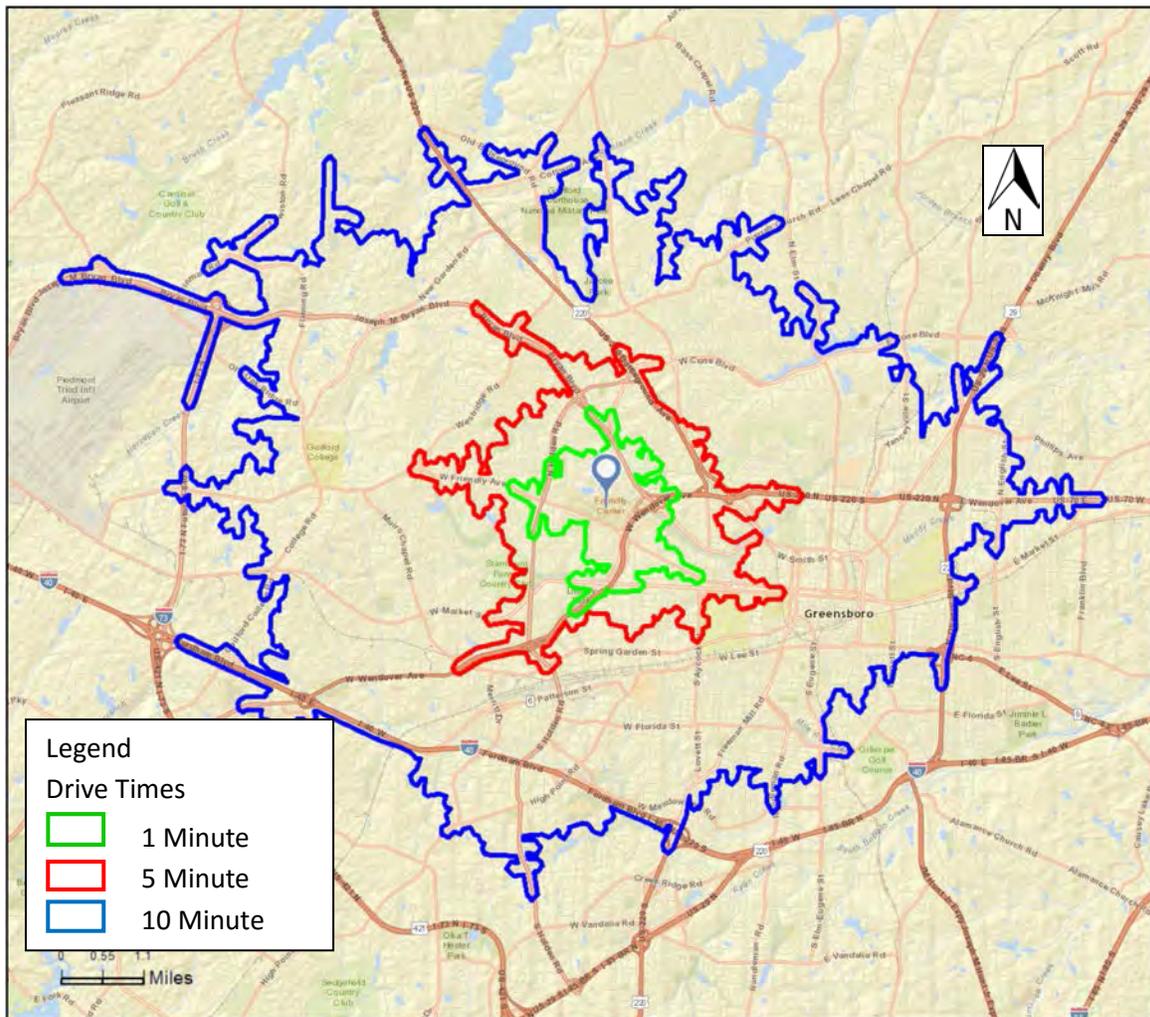
- The study area was annexed into the City in the 1950s
- Over the past 20 years, the area has experienced more intense development
  - The O. Henry Hotel opened in 1998
  - The Regal Greensboro Grande Stadium 16 movie theater opened in 1999
  - An expansion along Northline Avenue of over 18,000 square feet in 2002
  - Wesley Long Hospital became part of the Cone Health System in 1997. In 2012, a 29,000 square foot emergency department was added
  - The opening of The Shops at Friendly Center in 2006 with a building footprint of over 420,000 square feet in a 34 acre expansion



Figure 2: Original Friendly Center

## Demographics

Since the study area contains few residences, a larger area was selected to gain an accurate picture of the demographics that influence this portion of Friendly Avenue. This “area of influence” is based on an estimate of the number of households that can drive to the center within 5 minutes, which is a common geography used for market analysis. A 10-minute range was considered, but due to the central nature of the study area the 10-minute drive time covers almost the entire City. The area of influence was estimated with ESRI software Community Analyst using the intersection of West Friendly Avenue and West Avondale Drive. The ESRI service uses US Census Bureau data.



**Figure 3: Drive Times**  
 1, 5, and 10-minute drive times from Friendly Avenue and West Avondale Drive  
 Community Analyst from the Environmental Systems Research Institute (Esri)

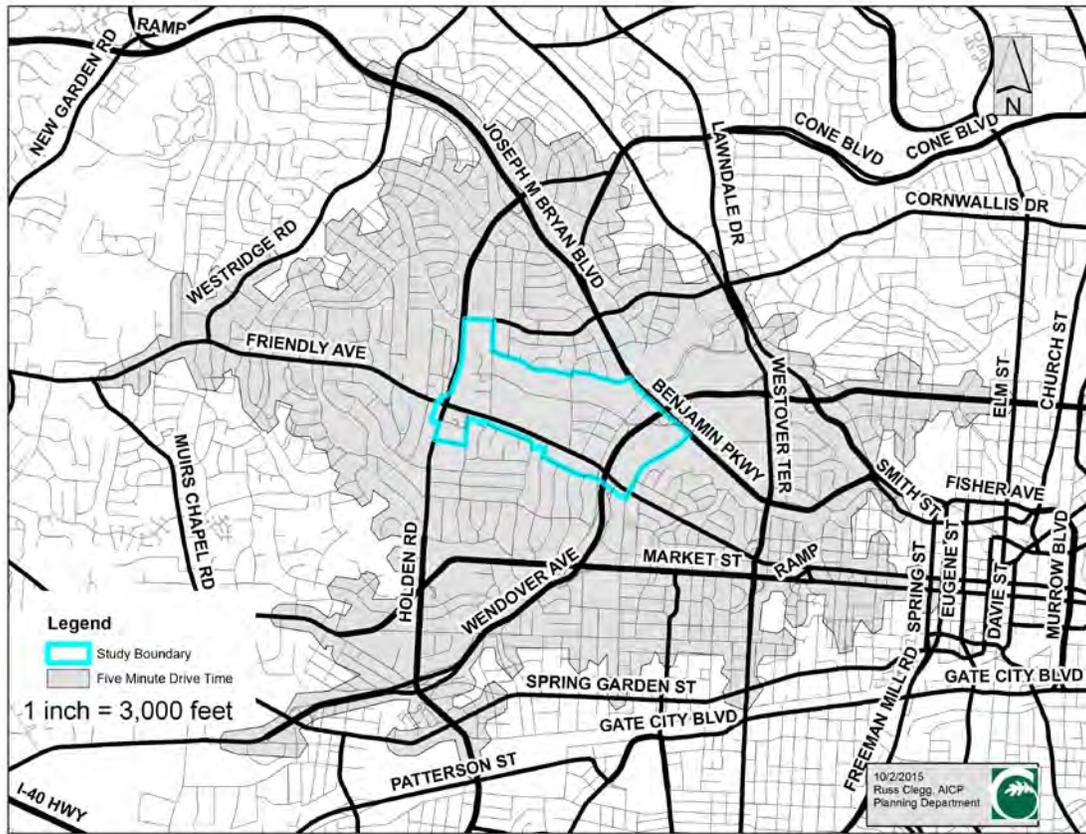


Figure 4: Five-Minute Drive Time Detail



The following tables compare the demographics of the area of influence surrounding the Friendly Avenue study area with the City of Greensboro as a whole. The population of the area analyzed accounts for 7.4% of the City’s population and 7.9% of its households.

Compared with the City as a whole, household size in the area of influence is slightly smaller and there are fewer renter occupied and vacant housing units. Median household income and per capita income are higher, along with median age.

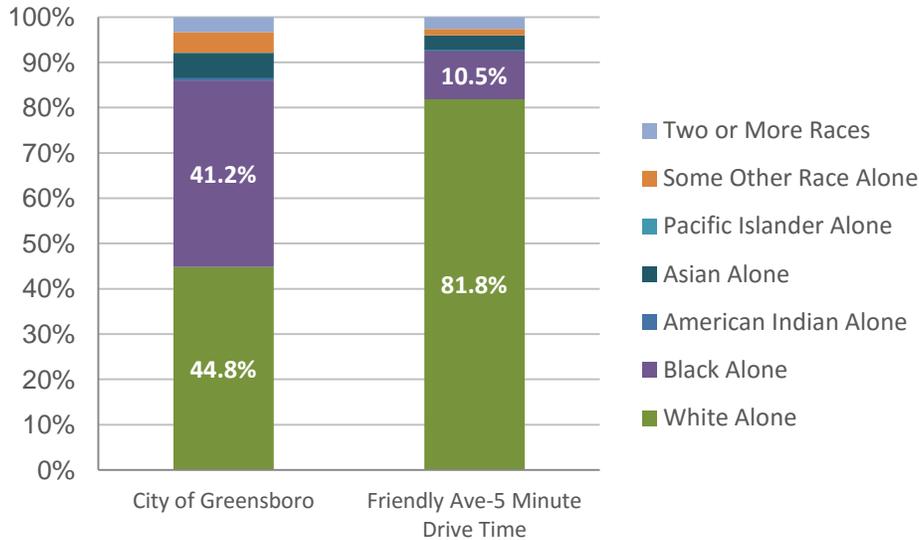
**Table 1: Housing and Income**

	City of Greensboro	Friendly Ave-5 Minute Drive Time	Difference	Percentage of total represented by study area
Population	278,584	20,660		7.4%
Households	115,734	9,087		7.9%
Average Household Size	2.31	2.08	-0.23	
Housing Units	129,427	9,965		7.7%
Owner Occupied	44.7%	57.9%	13.2%	
Renter Occupied	44.8%	33.3%	-11.5%	
Vacant	10.6%	8.8%	-1.8%	
Median Household Income	\$41,414	\$53,625	\$12,211	
Per Capita Income	\$26,515	\$38,057	\$11,542	
Median Age	34.6	39.0	4.40	

The comparison of race and ethnic percentages from the two areas are quite different. The City of Greensboro’s population is majority minority, meaning that there are a higher percentage of non-white residents than there are of white residents. The area of influence is less diverse, with 82% of residents being white.

**Table 2: Ethnicity**

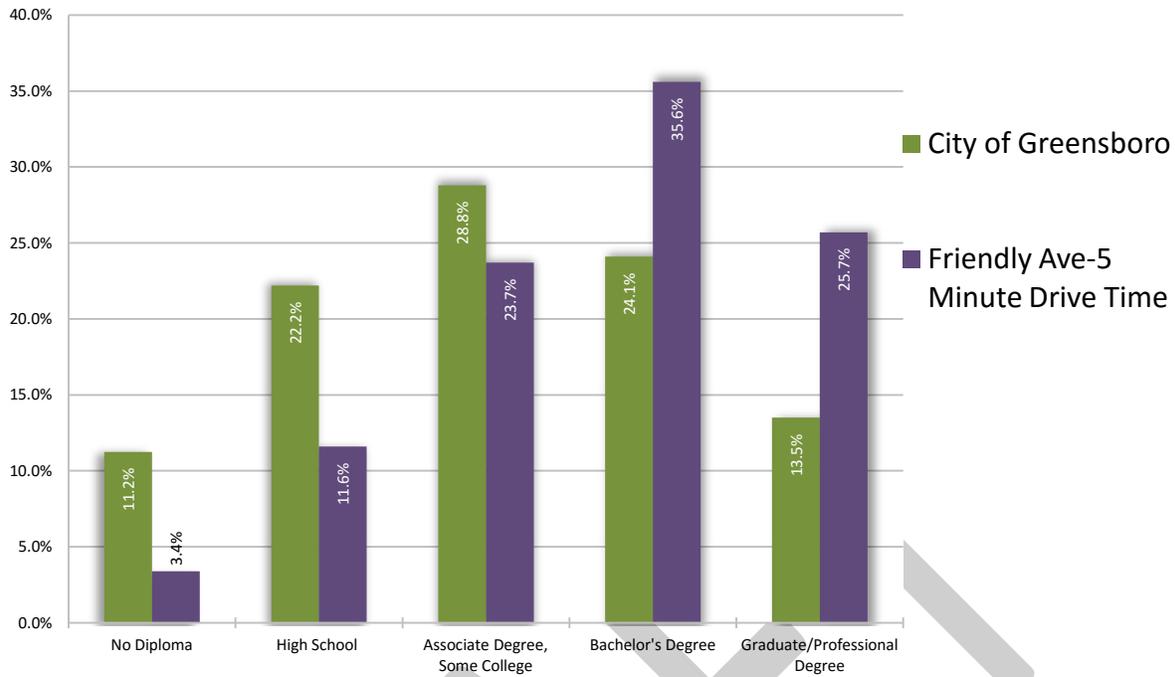
	City of Greensboro	Friendly Ave-5 Minute Drive Time	Percentage Points Difference
Population by Race/Ethnicity			
White Alone	44.8%	81.8%	37.0%
Black Alone	41.2%	10.5%	-30.7%
American Indian Alone	0.5%	0.3%	-0.2%
Asian Alone	5.5%	3.3%	-2.2%
Pacific Islander Alone	0.1%	0.0%	-0.1%
Some Other Race Alone	4.6%	1.4%	-3.2%
Two or More Races	3.3%	2.6%	-0.7%
Hispanic Origin	9.2%	4.0%	-5.2%



Within the area of influence, there are significantly more residents with four year or professional degrees when compared to the City as a whole. There are also more employed residents, and more residents working in White Collar industry occupations.

**Table 3: Education and Employment**

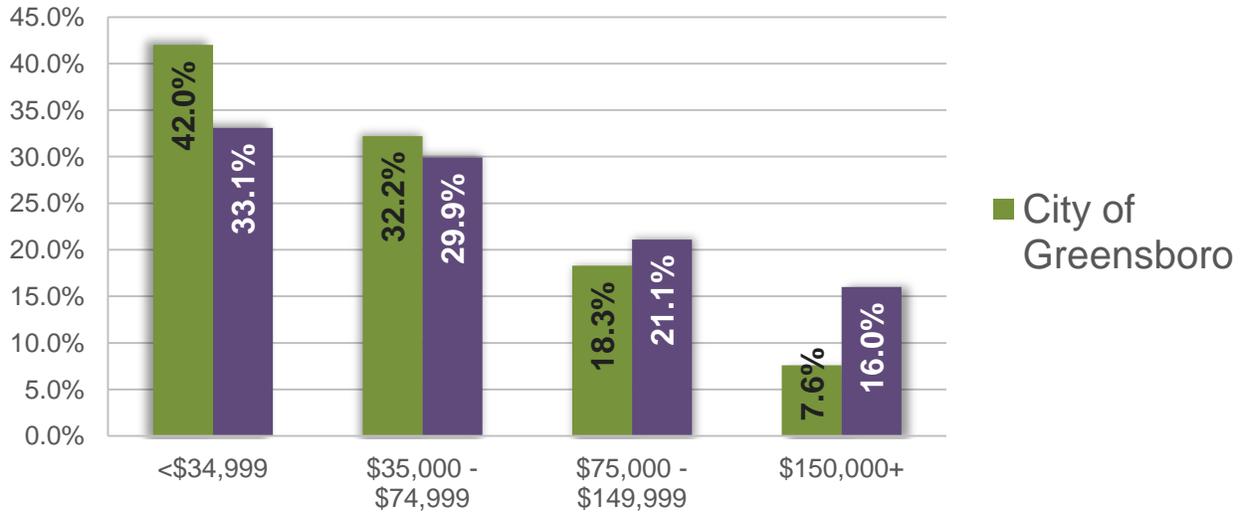
	City of Greensboro	Friendly Ave-5 Minute Drive Time	Difference
<b>Population 25+ by Educational Attainment</b>			
Less than 9th Grade	4.1%	1.2%	-2.9%
9th - 12th Grade, No Diploma	7.1%	2.2%	-4.9%
High School Graduate	19.3%	10.5%	-8.8%
GED/Alternative Credential	2.9%	1.1%	-1.8%
Some College, No Degree	22.3%	18.9%	-3.4%
Associate Degree	6.5%	4.8%	-1.7%
Bachelor's Degree	24.1%	35.6%	11.5%
Graduate/Professional Degree	13.5%	25.7%	12.2%
<b>Civilian Population 16+ in Labor Force</b>			
Employed	94.4%	95.9%	1.5%
Unemployed	5.6%	4.1%	-1.5%
<b>Employed Population 16+ by Occupation</b>			
Total	129,966	10,252	
White Collar	62.5%	72.8%	10.3%
Blue Collar	18.8%	10.1%	-8.7%
Services	18.8%	17.1%	-1.7%



Average household income is higher in the area of influence compared to the City of Greensboro as a whole, with a higher representation of higher income households in the top three tiers measured in this analysis.

**Table 4: Income**

	City of Greensboro	Friendly Ave-5 Minute Drive Time	Difference
Household Income	115,733	9,087	
<\$34,999	42.0%	33.1%	-8.9%
\$35,000 - \$74,999	32.2%	29.9%	-2.3%
\$75,000 - \$149,999	18.3%	21.1%	2.8%
\$150,000+	7.6%	16.0%	8.4%
Average Household Income	\$63,009	\$85,741	



## Environment

The study area is generally comprised of developed commercial areas with few remaining natural features and a variety of parks where there is little impervious surface. Generally, the surrounding area is composed of low density residential development.

### Natural Environment

The non-commercial parts of the study area have a gently rolling topography and a large tree canopy. Large portions of the property occupied by Sternberger Elementary School and the church at 3600 West Friendly Avenue are significantly wooded, as are the public parks.

The northern portion of the study area contains more open and wooded space, including the Bog Garden which contains a lake in a natural setting. A creek runs along the northern boundary of the study area with a limited flood zone; the area is not prone to flooding.



Figure 5: Flood Plains

## Built Environment

The study area is predominately commercial and institutional in nature. The largest single entity is Friendly Shopping Center, built in the form of an outdoor mall or lifestyle center. The original design was oriented to car parking and circulation, but the center has enhanced pedestrian connectivity as it has expanded and remodeled. Stormwater from most of the center is piped into a creek on the northern side of the property, though areas closer to Friendly Avenue and the southern portion of Green Valley Road the topography shifts the water flow to the south.

Single-family residential is the predominate use along the southern side of Friendly Avenue and along Hobbs Road. The average lot size is just over .40 of an acre. The age of housing stock varies. Those along the southern edge of the study area were built in the 1960s and 1980s, though a few date back to the 1920s. Most of the houses on the northern edge along Starmount Farms Drive were built in the late 1980s and 1990s. Houses in the vicinity of Hobbs Road on the western edge of the study area were built in the 1970s and 1980s with the exception of Hobbs Landing, which dates to the early 2000s. Houses along Friendly Avenue west of the shopping center were built in the 1930s and 1940s.

Neighborhood scale institutional uses make up the rest of the built environment in the study area, including churches and a public school. The exception is Wesley Long Hospital which has expanded into a major medical center over the past two decades.

## Parks and Green Space

There are several large parks within the study area. To the north, this includes the Bog Garden, the Tanger Family Bicentennial Garden and the David Caldwell Historical Center. Each of these parks has



Figure 6: Parks

unique features that set it apart and make them special-event destinations. The neighborhoods around the study area have neighborhood parks.

**The Tanger Family Bicentennial Gardens** is intensively landscaped with a variety of gardens. Planning for this park was lead by Greensboro Beautiful in 1976 as part of the Bicentennial celebration, in what at the time was 7.5 acres of City-owned flood plain along a creek. Greensboro Beautiful created expansion plans for the park in 1995, which were completed in 1999. The park was named after the Tanger family in 2006 due to their commitment to long-term support of the park.

**The David and Rachel Caldwell Historical Center** focuses on the Revolutionary War era and archeological finds from the property. The Center was dedicated in 2007; planning began after a bequest was made to Greensboro Beautiful in 2000. The park is on the site of the Log College founded by David Caldwell in 1767.

**The Bog Garden** features a lake and a wooded area with trails; a man-made, re-circulating 150 foot stream with waterfalls was added in 2005. The park was developed along with the Starmount Farms subdivision beginning in 1985; at that time that lake was heavily silted. Blanche Benjamin, the owner at the time, rebuilt the dam and cleared the lake back to its original depth before deeding the property over to the City.

**Lake Daniel Park** follows South Buffalo Creek which is one of many parks built along stream beds. This linear park is largely open space, with trails and connectivity to other parks with trails.

**Blanche Sternberger Benjamin Park** at the intersection of Friendly Avenue with Green Valley Road is owned by the Friends of Greensboro Parks and Recreation Foundation. The area surrounds a historic house that was donated and restored for use by The Junior League of Greensboro.

### *Key Findings*

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- Much of the study area is heavily developed commercial space, covered in impervious surface
- The surrounding neighborhoods are largely made up of low-density residential housing with a mature tree canopy
- The study area is surrounded by a variety of parks, some of which add connectivity to other trails and greenways



## Land Use

### Existing Land Use

The study area is dominated by Friendly Shopping Center, but includes a variety of residential areas, institutional uses and park space. Specific acreages per use are:

Land Use	Acres	Percent
Commercial	116.2	29.3%
Park / Open Space	82.2	20.7%
Institutional	48.0	12.1%
Detached Single Family	45.4	11.4%
Office	30.7	7.7%
Multi-Family	17.1	4.3%
Public Roadways	57.6	14.5%
<b>TOTAL</b>	<b>397.2</b>	

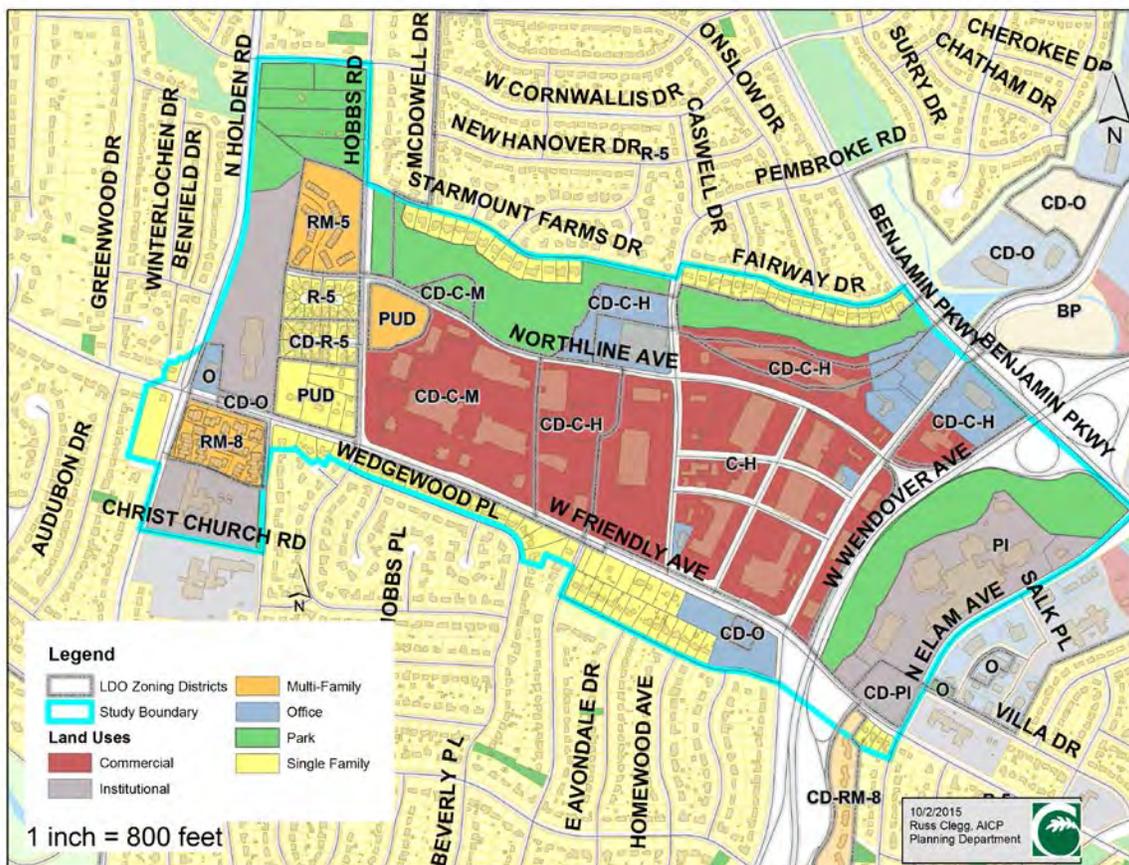


Figure 7: Current Land Use

Commercial and office uses are predominant within the study boundary. Other uses located on the periphery of the study area include:

- Multi-family developments to the west of the study area, and one planned to be integrated into the Shops at Friendly;
- Significant parks to the north and east of the study area, which connect to other parks and trail networks;
- Single-family residential uses on the periphery of the study area, part of a larger network of neighborhoods of predominantly detached, single-family housing;
- Institutional uses including Wesley Long Hospital, Sternberger Elementary School, and places of religious assembly.

Other significant nearby land uses include:

- To the northeast the contiguous campuses of Grimsley High School, Kiser Middle School, and Brooks Elementary School with a combined enrollment of 3,017 students.
- Green Valley Office Park to the north, a major employment center.
- Multiple medical offices across Elam Avenue from Wesley Long Hospital.

The balance of the surrounding area is comprised primarily of detached, single-family neighborhoods developed in the typical pattern of post-war suburban development:

- Concentrated land uses separated from each other, with commercial and office uses concentrated in shopping centers, strip malls and small office parks.
- A transportation network starting with cul-de-sacs and small neighborhood streets, leading to roads with increasingly heavy traffic.
- A network of neighborhood parks, generally located along small creeks.



## Zoning

Zoning districts establish the legal framework that guides development and redevelopment within the City. Commercial zoning covers over 40% of the study area, consistent with the predominant land use. Generally the current zoning is consistent with current land uses, though there are a wider variety of uses allowed in the existing zoning code than are currently constructed. Single-family residential is the predominant zoning beyond the study boundary.

Code	Zone Name	Acres	Percent
C-H	Commercial High	123.9	31.2%
R-3	Residential Single-Family 3	87.5	22.0%
PI	Public and Institutional	61.3	15.4%
R-5	Residential Single-Family 5	42.4	10.7%
C-M	Commercial Medium	38.1	9.6%
O	Office	16.2	4.1%
PUD	Planned Unit Development	10.7	2.7%
RM-5	Residential Multi-Family 5	9.1	2.3%
RM-8	Residential Multi-Family 8	8.0	2.0%
	<b>TOTAL</b>	<b>397.2</b>	

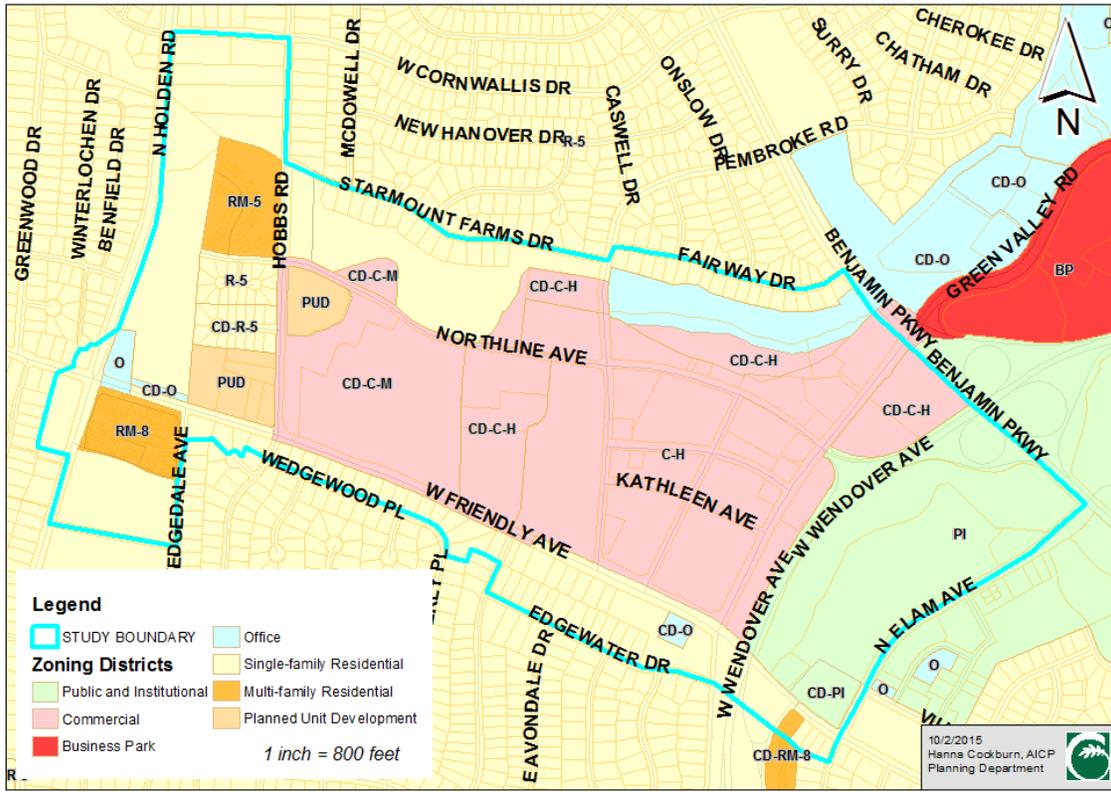


Figure 8: Zoning

### Connections 2025 Comprehensive Plan

Greensboro’s comprehensive plan, *Connections 2025*, provides general guidance for changes in land use based on policy statements and the Generalized Future Land Use Map (GFLUM). The current future land use designations for the study area generally align with the current uses. In early 2015, the GFLUM designation of property in the north west corner of Hobbs Road and Friendly Avenue was changed from Low Residential (3 to 5 dwelling units per acre) and Moderate Residential (5 to 12 dwelling units per acre) to Mixed Use Commercial in conjunction with a rezoning request for the site.

Future Land Use Category	Acres	Percent
Mixed Use Commercial	189.1	47.6%
Low Residential (3-5 du/ac)	116.2	29.3%
Moderate Residential (5-12 du/ac)	37.1	9.3%
Institutional	36.0	9.1%
Major Parks / Open Space	18.8	4.7%
<b>TOTAL</b>	<b>397.2</b>	

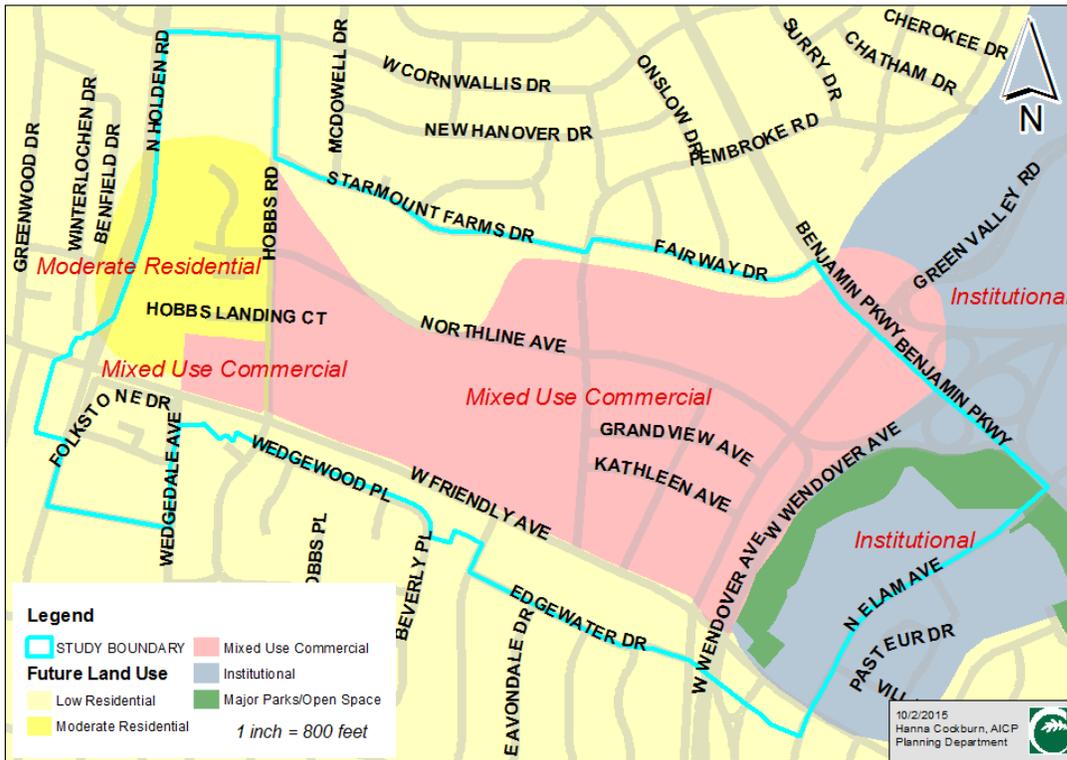


Figure 9: Generalized Future Land Use Map

The study area includes a designated Activity Center centered on the Friendly Shopping Center. Activity Centers are defined in the comprehensive plan as:

*“...existing or anticipated future concentrations of uses that function as destinations or hubs of activity for the surrounding area. Typically located in areas of mixed use shown on the Generalized Future Land Use Map, such centers are intended to included features such as a mix of higher intensity uses (housing, retail, office, etc.), compact development patterns, and pedestrian and transit linkages.”*

These areas were designated in the plan with a half-mile radius around a central spot, with the intention to be more clearly defined through future studies, such as this planning process.

### Areas of Potential Change

The core of the study area is intensely developed with commercial uses, in which office and potentially residential uses can also fit. The areas around this core are generally residential, and were developed in

a style that makes it difficult to blend new commercial uses into the current residential fabric. To understand the best way to incorporate new development into the area it is important to determine if there are areas more likely to change use in the near term.

One indicator of potential change is a difference between the zoning and future land use designations in place and the existing use, meaning that the use could change without a rezoning or comprehensive plan amendment. Within the study boundary, land uses generally match the allowed zoning.

In the past 10 years, there have been 3 rezoning requests approved in the study area.

**3101 West Friendly Avenue at the corner of Green Valley Road.** Rezoned from RS-12, a Residential Single Family category, to Conditional Medium Density Office in 2007. The change was requested to allow the Junior League of Greensboro to convert a historic house on the site for office use.

**The corner of Hobbs Road and Northline Road.** The 4.02 acre multi-family portion of the Shops at Friendly was rezoned in 2012 to increase the allowed number of residential units from 100 to 200.

**The corner of Hobbs Road and Friendly Avenue.** 6.4 acres were rezoned in 2015, from R-3, a low density residential category to a commercial Planned Unit Development.

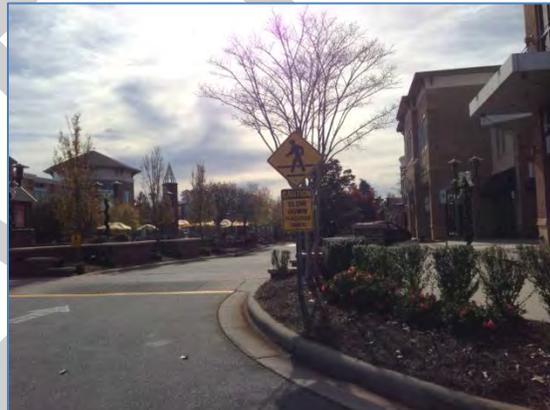
Another indicator that a property has potential to change in use is when land value is higher than the value of the buildings on the land. In the study area there were no groupings of parcels where this difference indicated a greater likelihood of change.

Given the location, traffic volumes in the study area, and the regional draw of existing development, development pressures are expected to continue within the study area, particularly at the fringes.

### *Key Findings*

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- Broadly, current land uses are in line with current zoning designations and with the Generalized Future Land Use Map.
- The study area is built out, with few vacant lots.
- Though primarily commercial, the study area contains a significant variety of institutional uses.
- The shopping center, hospital, parks and churches serve the local community but are also destinations for a much larger area.
- Though the demographics and good transportation access suggest that the area could draw additional development, there are no strong indications of a particular area more liable to be redeveloped.



## Transportation

Friendly Avenue is one of Greensboro’s major east/west connectors; in front of the Friendly Center, Friendly Avenue carries over 25,000 cars a day. The Center is located near several major thoroughfares - roads designed for the fast, efficient movement of high traffic volumes through the city. Shown on the map below, these include Wendover Avenue to the east, Benjamin Parkway/Bryan Boulevard to the north, and Holden Road to the west. Collectively, these roads carry more than 75,000 vehicles per day and provide easy access to the study area for most Greensboro residents.

The Greensboro Transit Authority (GTA) provides daily service to the study area along three regular routes and a HEAT Route. The study area is served by bus routes 26, 27, 7 and 72. Route 72 is a Higher Education Area Transit (HEAT) route, providing connections for students at UNCG, NC A&T, Elon Law School, and Bennett College. Daily transit ridership in the corridor is high, with particularly high counts at stops serving Friendly Center and Wesley Long Hospital.

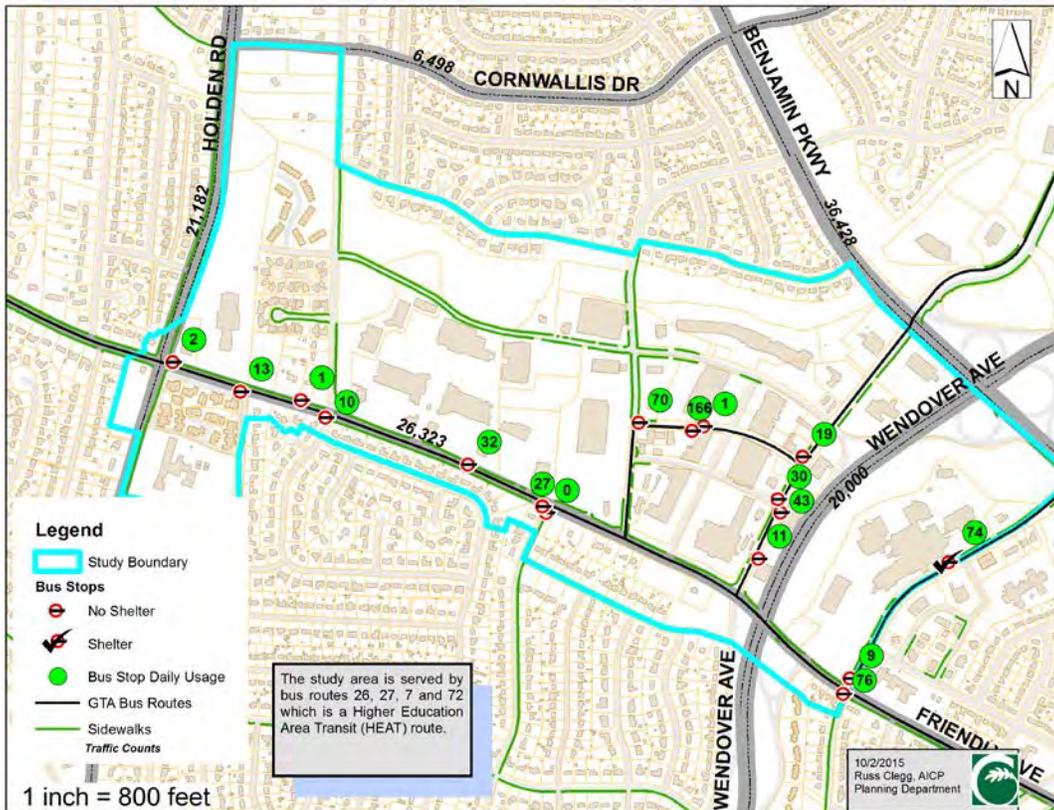


Figure 10: Major Transportation Elements

The quality of pedestrian accommodation is mixed across the study area. Friendly Center has made improvements to its internal sidewalk network, but sidewalks are limited on the periphery and there is a general lack of sidewalks in surrounding neighborhoods. Non-motorized access to the Green Valley office park north of the study area is limited.



Greensboro Department of Transportation plans are in the early stages of development for pedestrian focused roadway improvements within the study area. If funding is secured, these improvements could be completed in the next 5 to 10 years.

- **Friendly Avenue, between Lindell Street and Friendly Center main entrance.** Changes being considered include a median and right-in/right-out access at the main entrance to Friendly Center to improve safety. Improvements to the intersections of Green Valley Road and Lindell Street are proposed to improve pedestrian safety and traffic flow.
- **Benjamin Parkway, between Wendover Avenue and Holden Road.** Plans include pedestrian facilities to improve access to Green Valley office park and the intersections of Pembroke Road and Cornwallis Drive. This project also includes water and sewer upgrades.

### *Key Findings*

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- Transit ridership in the study area is high on both GTA and HEAT routes.
- Pedestrian access in the center has improved, but is not consistent throughout the study area.
- Plans are underway to improve several key intersections.
- The area has the potential to be a hub in the Greenway network with improvements identified in the BiPed Plan.



## Public Safety

Crime rates in the study area are relatively low and reflect the predominant land uses. Between October 2011 and September 2015, shoplifting was the most prevalent crime, accounting for 611 of the 857 reported Part One offenses. Larceny, embezzlement, and fraud also make up a significant percentage.

In comparison with the average for the previous 3 years, crime for the most recent time period has increased slightly. The table for Part Two Offenses only includes crimes that have averaged more than 5 occurrences per year.

**Table 5: Part 1 Criminal Offences**

	Oct 2011 - Sept 2012	Oct 2012 - Sept 2013	Oct 2013 - Sept 2014	3 Year Average	Oct 2014 - Sept 2015
<b>Part 1 Total</b>	<b>259</b>	<b>201</b>	<b>173</b>	<b>211</b>	<b>224</b>
SHOPLIFTING	183	131	131	148.33	166
LARCENY	55	53	35	47.67	43
ROBBERY	6	5	2	4.33	5
AGGRAVATED ASSAULT	3	7	0	3.33	4
CAR THEFT	3	1	2	2.00	4
BURGLARY - FORCED ENTRY	6	2	2	3.33	2
POCKET PICKING	3	1	1	1.67	0
RAPE	0	1	0	.33	0

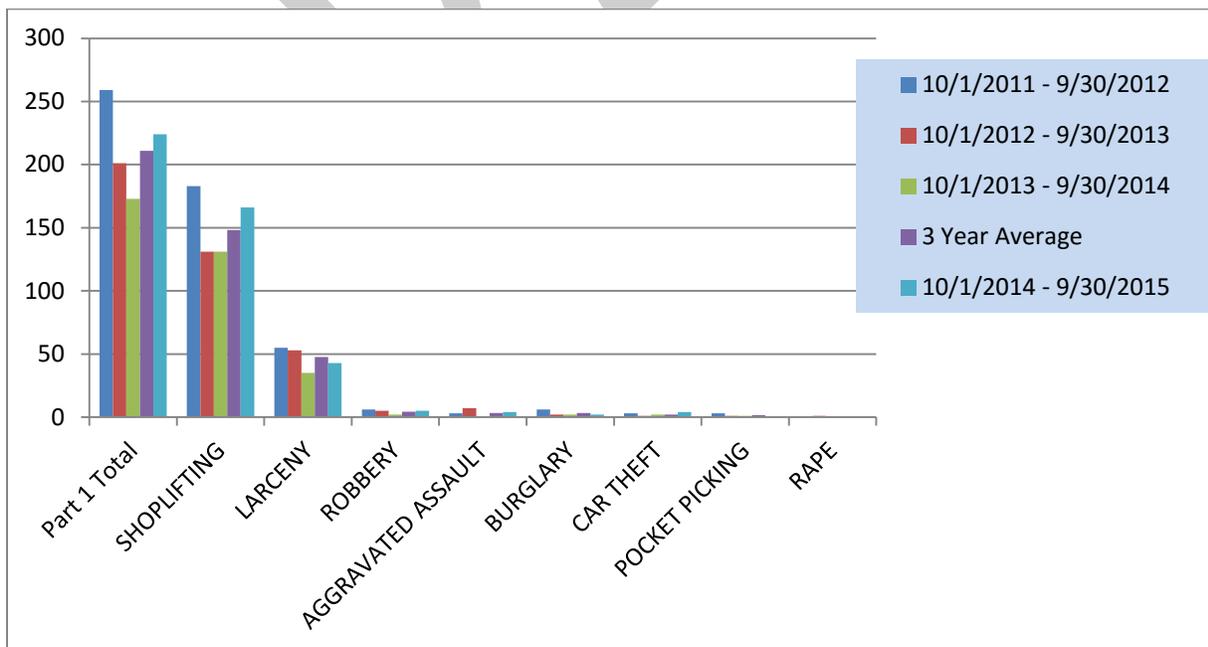
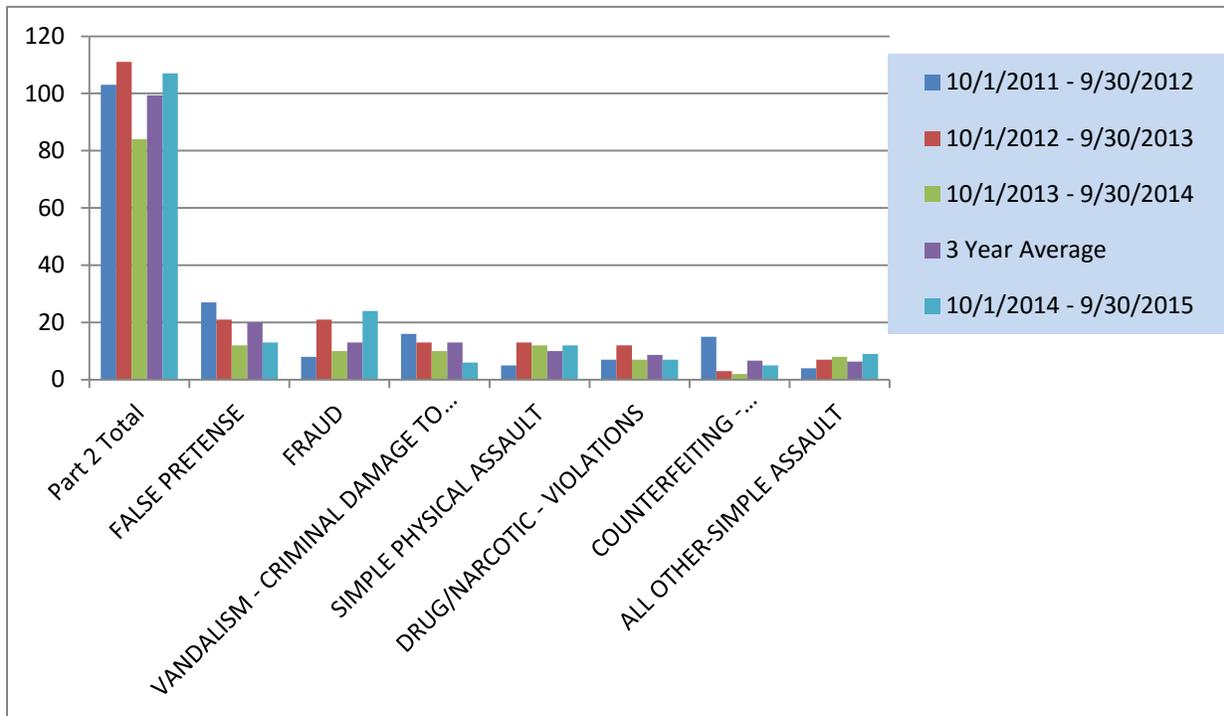


Table 6: Part 2 Criminal Offences

	Oct 2011 - Sept 2012	Oct 2012 - Sept 2013	Oct 2013 - Sept 2014	3 Year Average	Oct 2014 - Sept 2015
<b>Part 2 Total</b>	<b>103</b>	<b>111</b>	<b>84</b>	<b>99.33</b>	<b>107</b>
OBTAINING MONEY/PROPERTY BY FALSE PRETENSE	27	21	12	<b>20.00</b>	13
FRAUD	8	21	10	<b>13.00</b>	24
VANDALISM	16	13	10	<b>13.00</b>	6
SIMPLE PHYSICAL ASSAULT	5	13	12	<b>10.00</b>	12
DRUG/NARCOTIC VIOLATIONS	7	12	7	<b>8.67</b>	7
COUNTERFEITING	15	3	2	<b>6.67</b>	5
ALL OTHER-SIMPLE ASSAULT	4	7	8	<b>6.33</b>	9



### Key Findings

- The predominant types of crime in the study area are in keeping with the largely commercial land uses.
- It is difficult to find a small area in Greensboro similar enough to Friendly Center to use as a comparison, but compared to Greensboro as a whole for the time period studied:
  - the study area accounts for about 1% of all reported crime in the City:
  - as a percentage of the total number of crimes in each area, a few types of crime occurred more frequently in the study area than the City as a whole, though in all cases the number of crimes was lower in the study area.

Types of Crime as a Percentage of the Total		
	Study Area	Greensboro
Shoplifting	71%	22%
Assault	19%	13%
Forgery	3%	1%
Counterfeiting	6%	1%
Obtaining Property through False Pretense	18%	2%
Fraud	16%	5%
Embezzlement	6%	1%
Child Neglect, Offence Against Family	3%	2%
Trespassing	2%	1%

DRAFT

## Market Analysis

Market data was gathered for the area of influence consisting of the five-minute drive time to the center of the study area. Community Analyst estimates the demand for retail products and compares this with reported sales in the same area. This provides an estimate of retail sales to area residents that are “leaking” or taking place outside of the area, and of sales that are being made to consumers driving in from outside the area of influence, which are defined as “surplus” sales.

For general retail sales, both the City and the sample area have a surplus of retail options, meaning that shoppers are traveling in from other areas to buy merchandise. Data about specific industry groups shows that the sample area is lacking in retailers specializing in Auto Parts, Accessories and Tire Stores, Building/Lawn and Garden Supply Stores, and Non-store Retailers.

The full Retail Market Place Profile is on the next page.

### *Key Findings*

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- There is less ethnic diversity in the area of influence than in the City of Greensboro as a whole.
- The area of influence has a higher percentage of advanced degrees, employment and higher income than the City of Greensboro as a whole.
- Retail in the study area attracts shoppers outside the five minute drive time, particularly in clothing and food industries.



## Retail MarketPlace Profile

Friendly Corridor - 5 Minute Drive Times  
 W Friendly Ave & W Avondale Dr, Greensboro, North Carolin...  
 Drive Time: 5 minute radius

Prepared by Esri  
 Latitude: 36.08451  
 Longitude: -79.83915

### Summary Demographics

2015 Population	20,660
2015 Households	9,087
2015 Median Disposable Income	\$41,989
2015 Per Capita Income	\$38,057

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$301,666,677	\$513,320,467	-\$211,653,790	-26.0	322
Total Retail Trade	44-45	\$268,580,701	\$436,184,715	-\$167,604,014	-23.8	257
Total Food & Drink	722	\$33,085,975	\$77,135,752	-\$44,049,777	-40.0	65

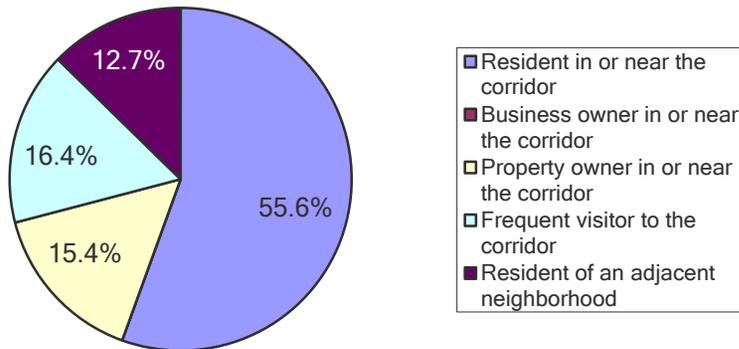
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$56,036,067	\$105,577,474	-\$49,541,407	-30.7	10
Automobile Dealers	4411	\$48,247,995	\$104,483,638	-\$56,235,643	-36.8	7
Other Motor Vehicle Dealers	4412	\$3,298,499	\$447,466	\$2,851,033	76.1	2
Auto Parts, Accessories & Tire Stores	4413	\$4,489,574	\$646,370	\$3,843,204	74.8	1
Furniture & Home Furnishings Stores	442	\$6,669,615	\$19,924,341	-\$13,254,726	-49.8	25
Furniture Stores	4421	\$3,656,716	\$3,277,490	\$379,226	5.5	9
Home Furnishings Stores	4422	\$3,012,899	\$16,646,850	-\$13,633,951	-69.3	15
Electronics & Appliance Stores	443	\$7,705,761	\$47,709,083	-\$40,003,322	-72.2	12
Bldg Materials, Garden Equip. & Supply Stores	444	\$10,514,838	\$3,174,099	\$7,340,739	53.6	12
Bldg Material & Supplies Dealers	4441	\$9,103,250	\$3,174,099	\$5,929,151	48.3	12
Lawn & Garden Equip & Supply Stores	4442	\$1,411,588	\$0	\$1,411,588	100.0	0
Food & Beverage Stores	445	\$40,766,003	\$43,789,160	-\$3,023,157	-3.6	25
Grocery Stores	4451	\$38,406,124	\$39,849,723	-\$1,443,599	-1.8	16
Specialty Food Stores	4452	\$713,737	\$1,434,793	-\$721,056	-33.6	7
Beer, Wine & Liquor Stores	4453	\$1,646,143	\$2,504,645	-\$858,502	-20.7	3
Health & Personal Care Stores	446,4461	\$22,372,365	\$38,325,804	-\$15,953,439	-26.3	25
Gasoline Stations	447,4471	\$27,996,857	\$28,963,950	-\$967,093	-1.7	6
Clothing & Clothing Accessories Stores	448	\$17,793,952	\$78,876,021	-\$61,082,069	-63.2	65
Clothing Stores	4481	\$12,638,774	\$61,833,094	-\$49,194,320	-66.1	49
Shoe Stores	4482	\$2,416,886	\$10,014,030	-\$7,597,144	-61.1	8
Jewelry, Luggage & Leather Goods Stores	4483	\$2,738,292	\$7,028,896	-\$4,290,604	-43.9	8
Sporting Goods, Hobby, Book & Music Stores	451	\$6,205,867	\$15,013,241	-\$8,807,374	-41.5	26
Sporting Goods/Hobby/Musical Instr Stores	4511	\$4,509,883	\$10,108,927	-\$5,599,044	-38.3	20
Book, Periodical & Music Stores	4512	\$1,695,983	\$4,904,314	-\$3,208,331	-48.6	6
General Merchandise Stores	452	\$50,846,912	\$42,712,805	\$8,134,107	8.7	2
Department Stores Excluding Leased Depts.	4521	\$17,394,072	\$7,309,290	\$10,084,782	40.8	1
Other General Merchandise Stores	4529	\$33,452,840	\$35,403,515	-\$1,950,675	-2.8	1
Miscellaneous Store Retailers	453	\$6,762,941	\$10,442,030	-\$3,679,089	-21.4	45
Florists	4531	\$279,831	\$787,948	-\$508,117	-47.6	4
Office Supplies, Stationery & Gift Stores	4532	\$1,963,031	\$596,596	\$1,366,435	53.4	6
Used Merchandise Stores	4533	\$912,067	\$1,960,969	-\$1,048,902	-36.5	7
Other Miscellaneous Store Retailers	4539	\$3,608,012	\$7,096,518	-\$3,488,506	-32.6	28
Nonstore Retailers	454	\$14,909,524	\$1,676,708	\$13,232,816	79.8	5
Electronic Shopping & Mail-Order Houses	4541	\$11,521,387	\$0	\$11,521,387	100.0	0
Vending Machine Operators	4542	\$631,835	\$133,622	\$498,213	65.1	1
Direct Selling Establishments	4543	\$2,756,301	\$1,543,086	\$1,213,215	28.2	4
Food Services & Drinking Places	722	\$33,085,975	\$77,135,752	-\$44,049,777	-40.0	65
Full-Service Restaurants	7221	\$12,151,262	\$38,137,976	-\$25,986,714	-51.7	24
Limited-Service Eating Places	7222	\$17,448,229	\$31,870,462	-\$14,422,233	-29.2	27
Special Food Services	7223	\$730,792	\$3,965,137	-\$3,234,345	-68.9	2
Drinking Places - Alcoholic Beverages	7224	\$2,755,693	\$3,162,176	-\$406,483	-6.9	12

### First Online Survey Results

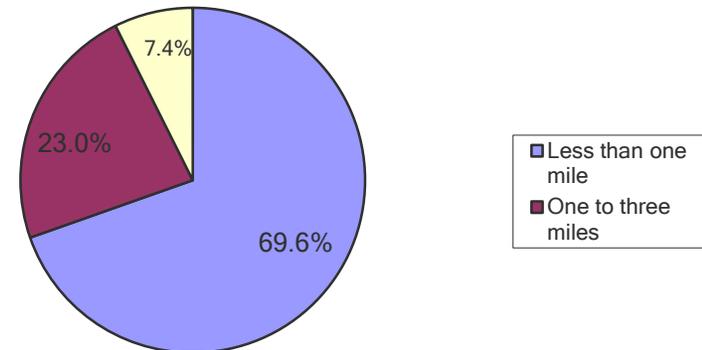
Question 1: I am a...Responses	Response Percent	Response Count
Resident in or near the corridor	55.6%	180
Business owner in or near the corridor	0.0%	0
Property owner in or near the corridor	15.4%	50
Frequent visitor to the corridor	16.4%	53
Resident of an adjacent neighborhood	12.7%	41
Other (please specify)		12
<i>answered question</i>		<b>324</b>

Question 2: Approximately how far do you live from the study area?... Responses	Response Percent	Response Count
Less than one mile	69.6%	227
One to three miles	23.0%	75
three to five miles	7.4%	24
<i>answered question</i>		<b>326</b>

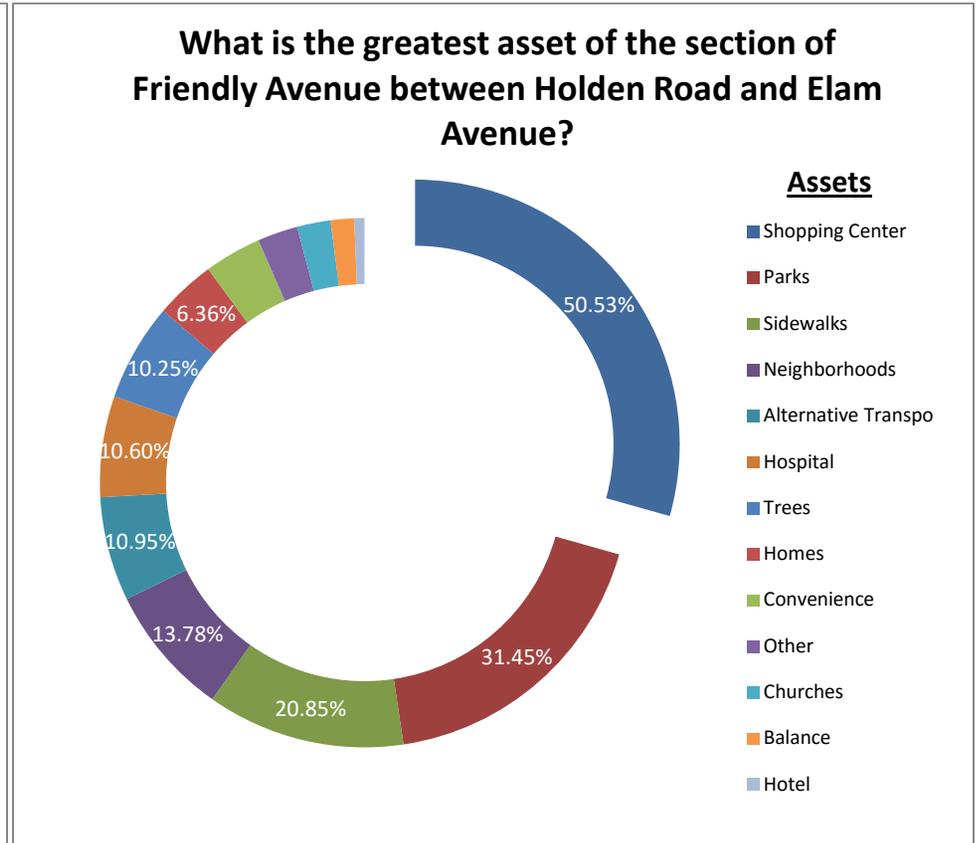
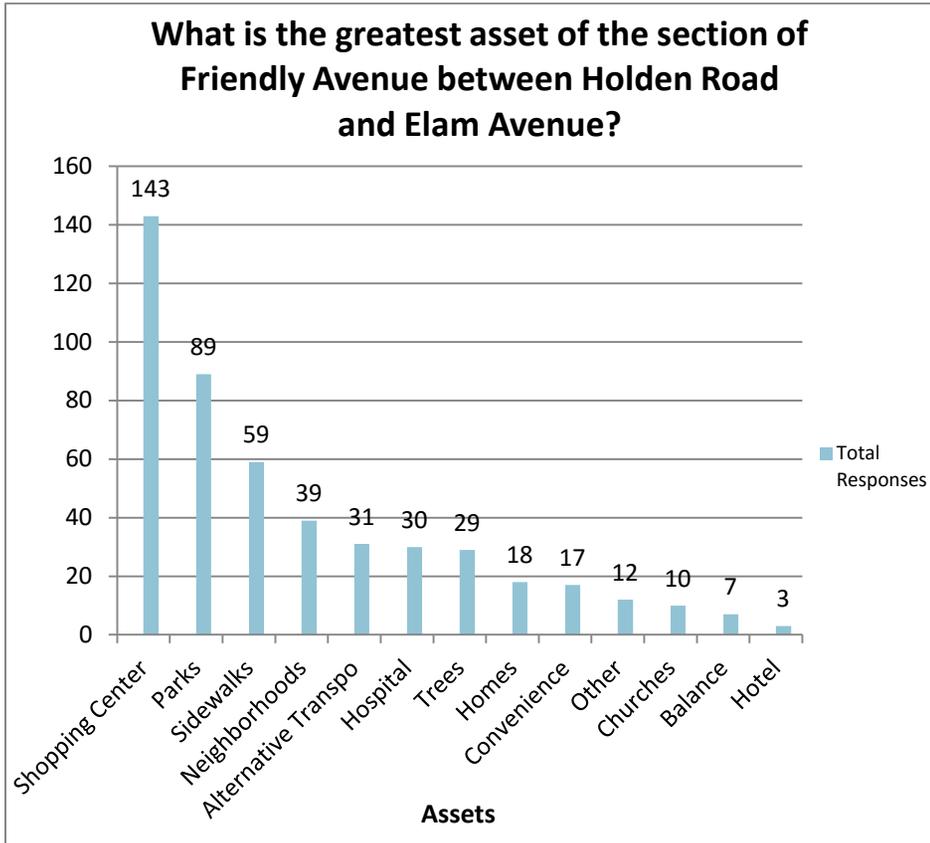
Question 1: I am a...



Question 2:  
Approximately how far do you live from the study area?



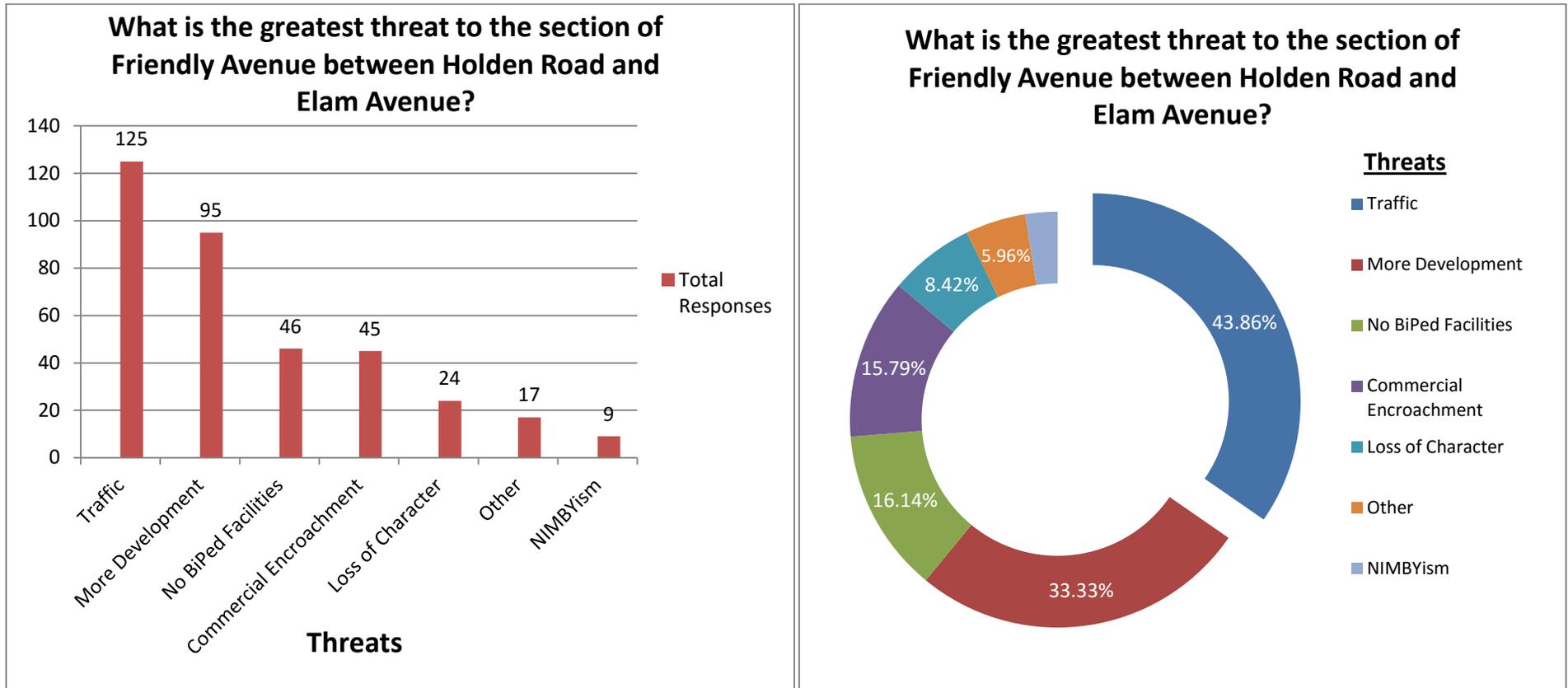
Question 3: What is the greatest asset of the section of Friendly Avenue between Holden Road and Elam Avenue?  
 (Total # of Responses = 283)



What we heard...

- “The bike paths that are nearby--the natural areas across from friendly next to JLG house--the nearby parks--the trees everywhere--and obviously the shops!”
- “I believe the shopping center, the bike trail with its safe green space, and the tree canopies are the area’s largest assets. And I’m assuming no one is planning to remove or do away with the hospital, obviously.”
- “A hospital, shopping area with a variety of stores and places to eat, and access to major roads. It’s contained pretty well at the moment.”

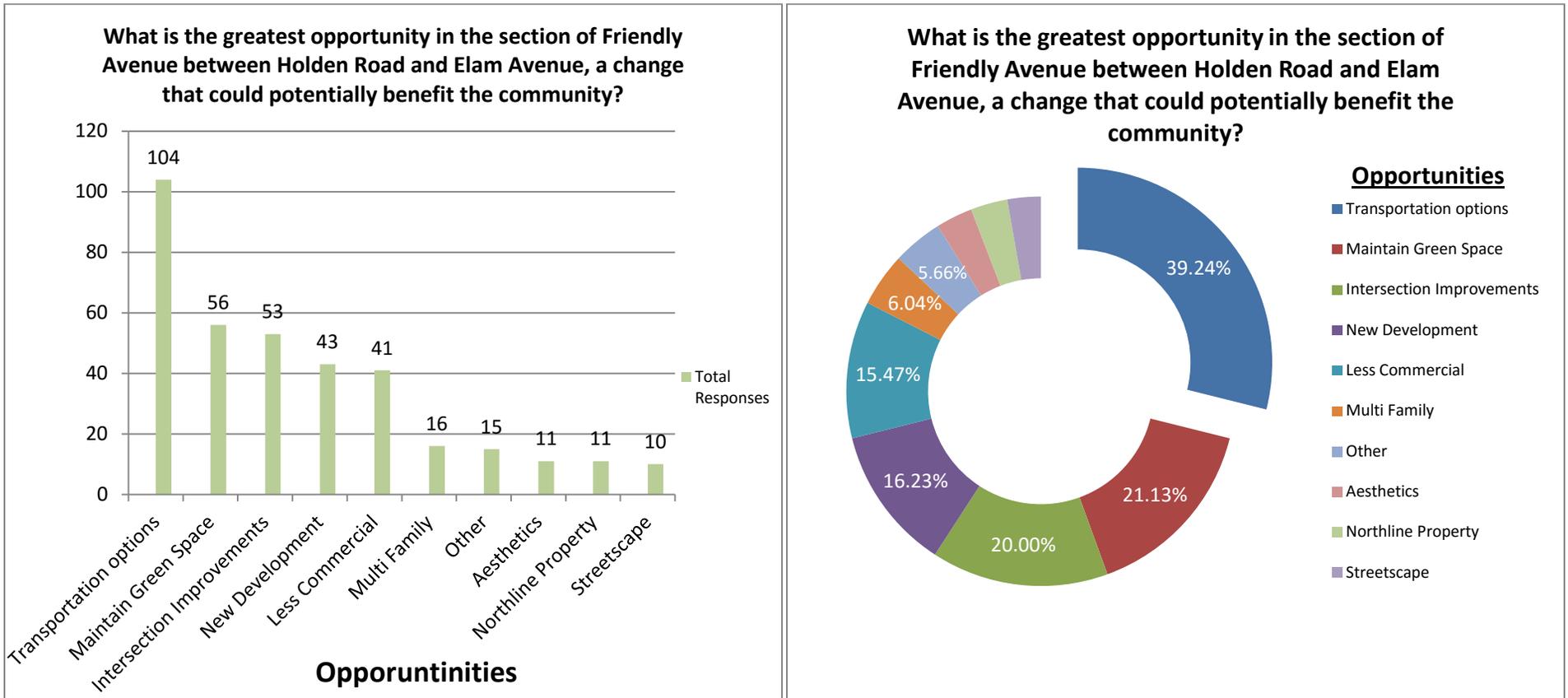
Question 4: What is the greatest threat to the section of Friendly Avenue between Holden Road and Elam Avenue? (n=285)



What we heard...

- “With additional retail development, I am concerned about heavier traffic which can make it more dangerous for pedestrians and drivers. I am worried that walkability will be threatened and that noise and pollution will negatively impact the area.”
- “The intersection of Friendly/Green Valley is very dangerous. Too much traffic (we don't want it to be another West Wendover area) is the greatest threat.”
- “Too many Big businesses! There's so many already, we don't need any more. No more clothing stores, no more restaurants, no more!”

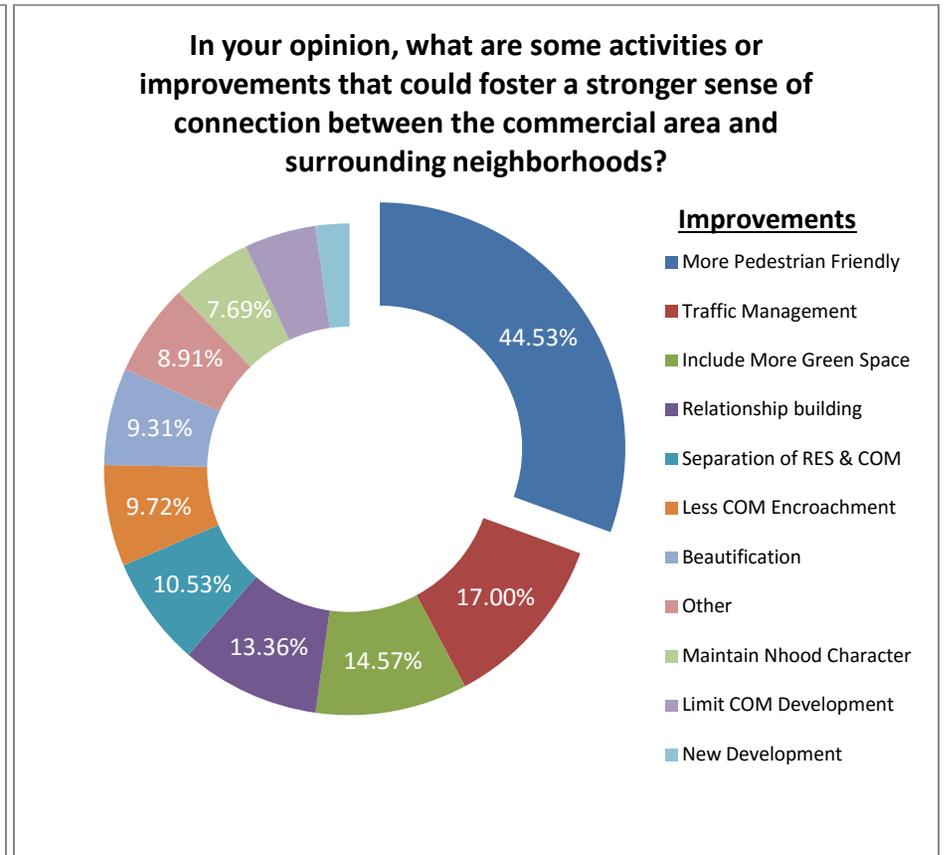
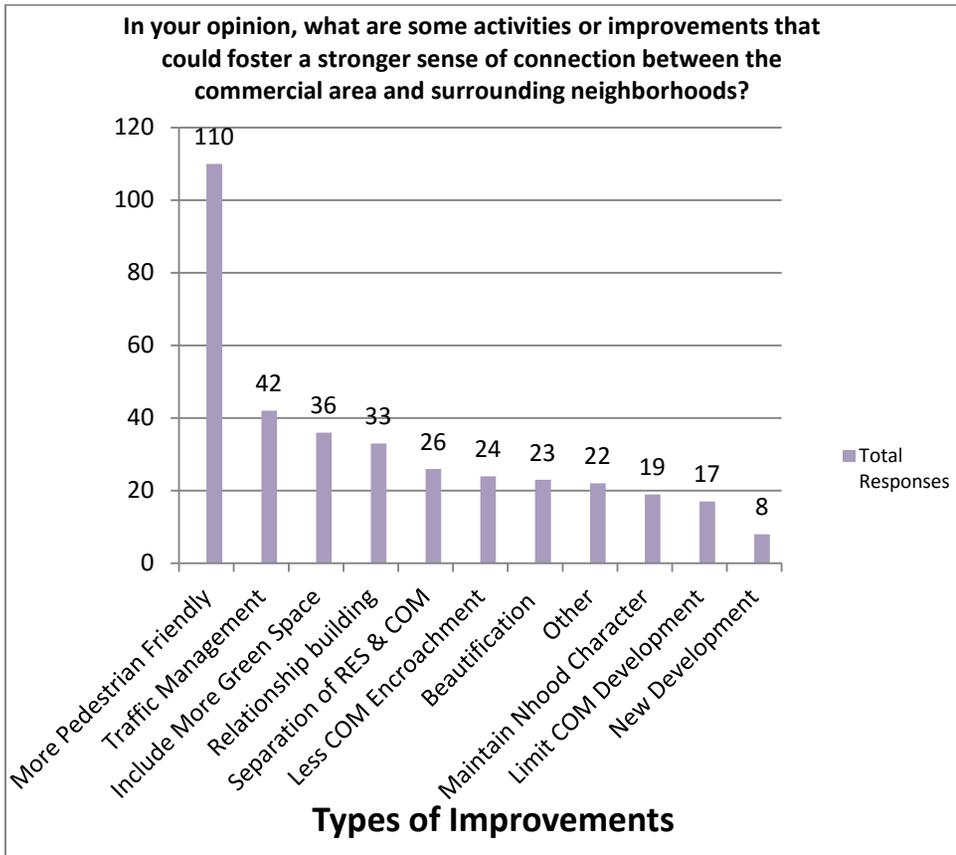
Question 5: What is the greatest opportunity in the section of Friendly Avenue between Holden Road and Elam Avenue, a change that could potentially benefit the community? (n=265)



What we heard...

- “The greatest opportunity for improvement would be sidewalks and bike paths and increased pedestrian access within and around the section.”
- “Green spaces are pivotal to a peaceful city, especially in areas of over-commercialization.”
- “Traffic light engineering to improve the traffic flows and reduce air pollution, especially the sequencing of lights in off hours.”

Question 6: In your opinion, what are some activities or improvements that could foster a stronger sense of connection between the commercial area and surrounding neighborhoods? (n=247)



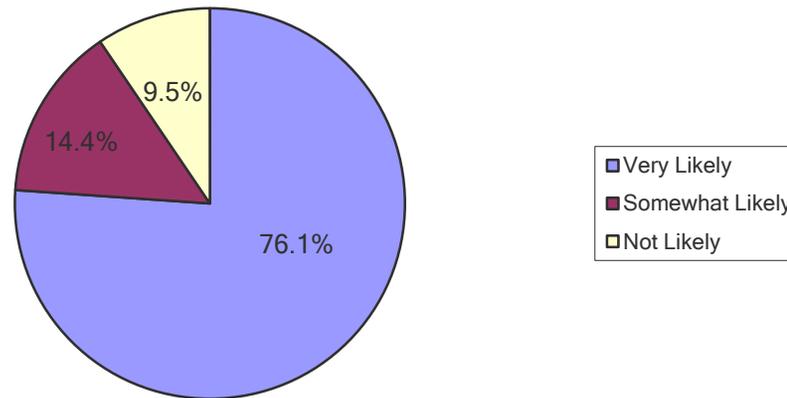
What we heard...

- “Special open houses with deals at the various stores and restaurants... Also, participation by local merchants in neighborhood activities such as National Night Out”
- “Better ability for families that live in the surrounding neighborhoods (especially those across large streets) to walk/bike to activities in Friendly Center or at the city parks.”
- “Pedestrian and bike ways, better defined more aesthetically (green!) pleasing transitions between commercial and residential.”

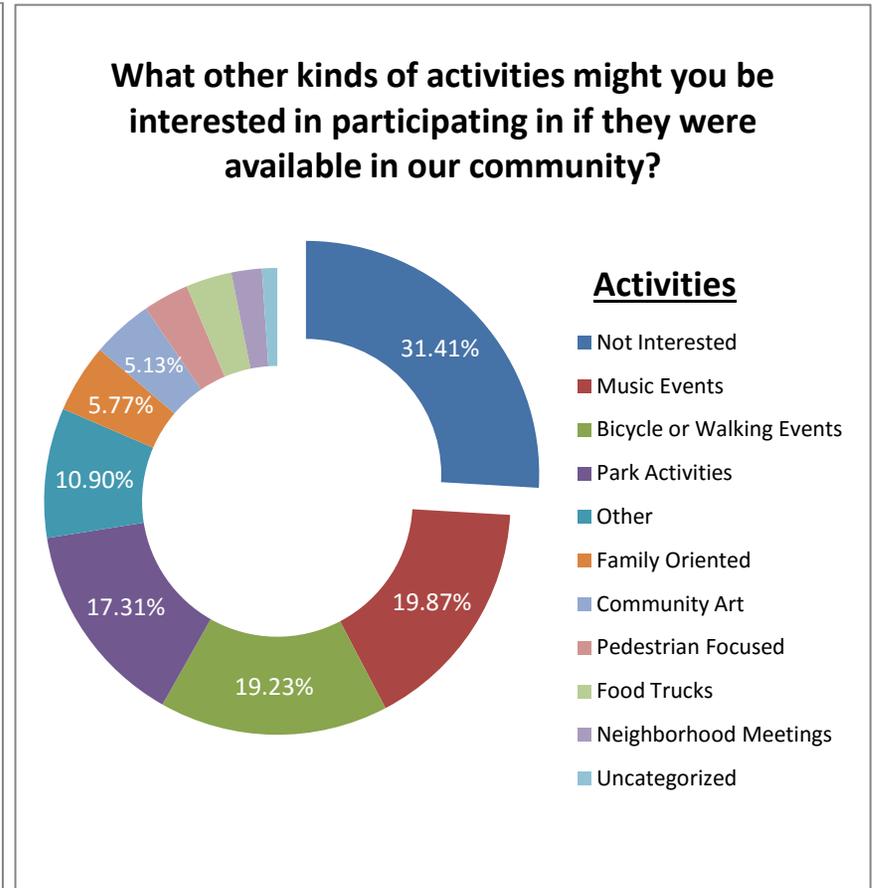
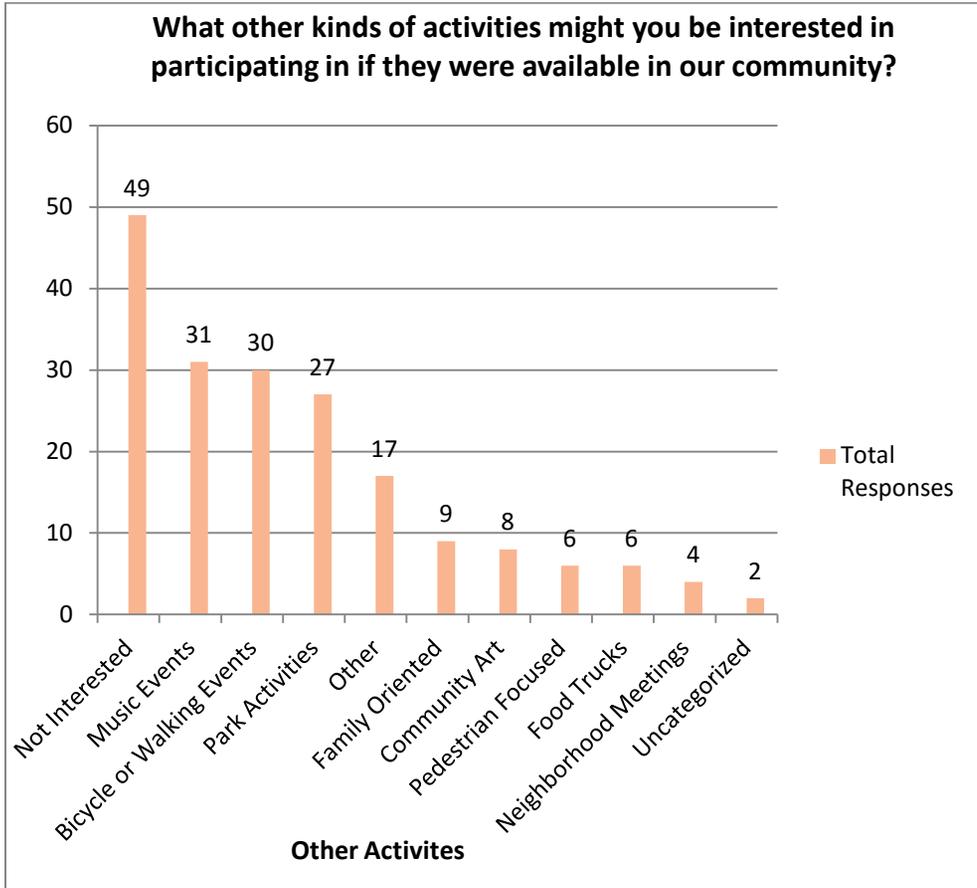
Question 7: How likely would you be to take advantage of improvements that would make it easier to walk or bike to the Friendly Center?

How likely would you be to take advantage of improvements that would make it easier to walk or bike to the Friendly Center?		
Answer Options	Response Percent	Response Count
Very Likely	76.1%	217
Somewhat Likely	14.4%	41
Not Likely	9.5%	27
	<i>answered question</i>	285
	<i>skipped question</i>	43

How likely would you be to take advantage of improvements that would make it easier to walk or bike to the Friendly Center?



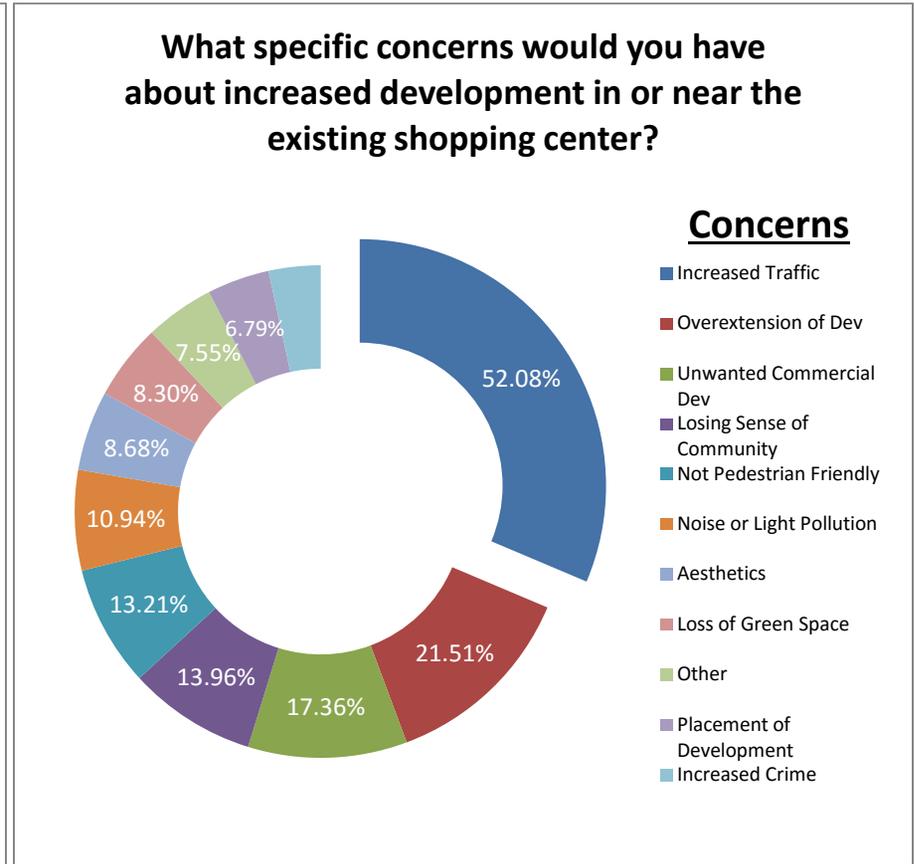
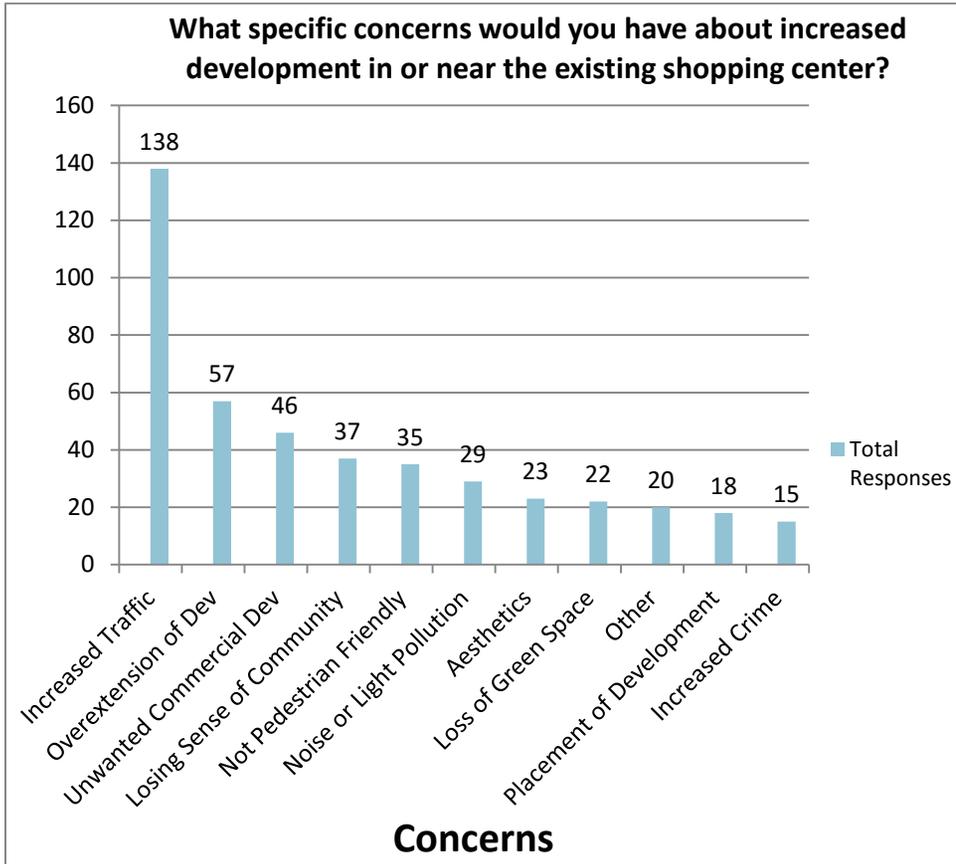
Question 8: What other kinds of activities might you be interested in participating in if they were available in our community? (n=156)



What we heard...

- “We already have it all”
- “ Food truck or music social gatherings”
- “We come to the Spring Arts fair, the summer solstice event, and others...walking there. Not sure what else, but we would come to park music, street shows, etc.”

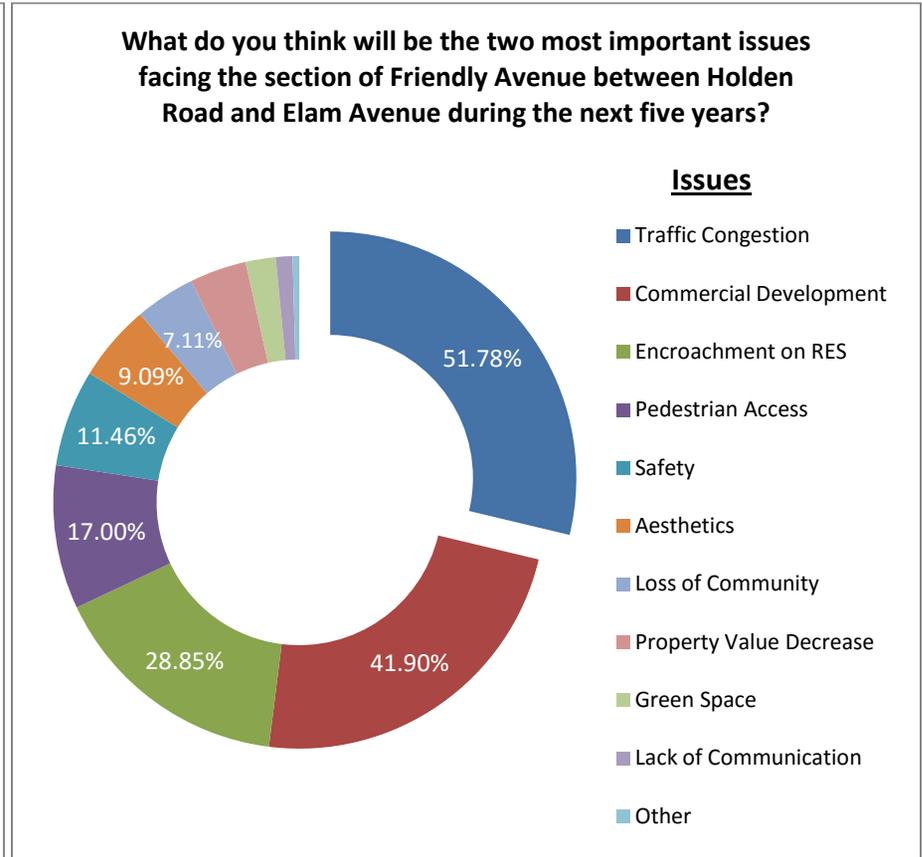
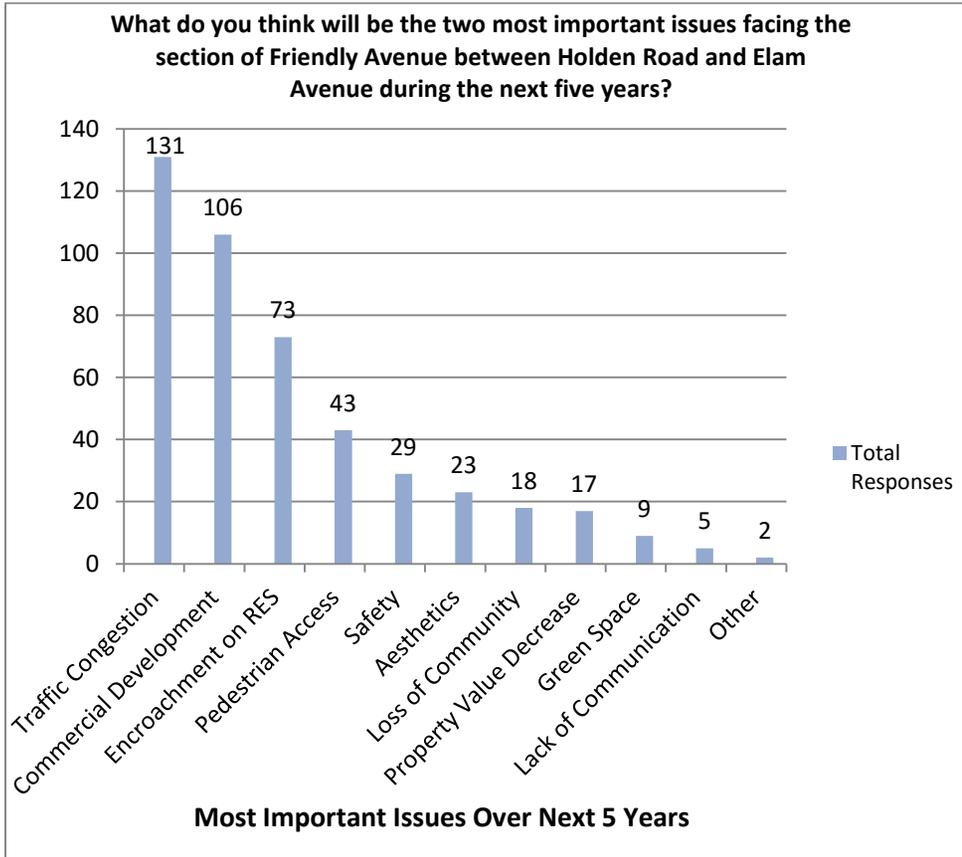
Question 9: What specific concerns would you have about increased development in or near the existing shopping center? (n=265)



What we heard...

- “More traffic. I live on Hobbs Rd between New Garden Road and Friendly Center. There is already a lot of traffic between the 2 shopping areas without increasing development.”
- “Encroachment of commercial development on residential areas.”
- “Choosing undesirable retailers and too many retailers. No Kmart or WalMart presence! Lack of parking”

*Question 10: What do you think will be the two most important issues facing the section of Friendly Avenue between Holden Road and Elam Avenue during the next five years?*



What we heard...

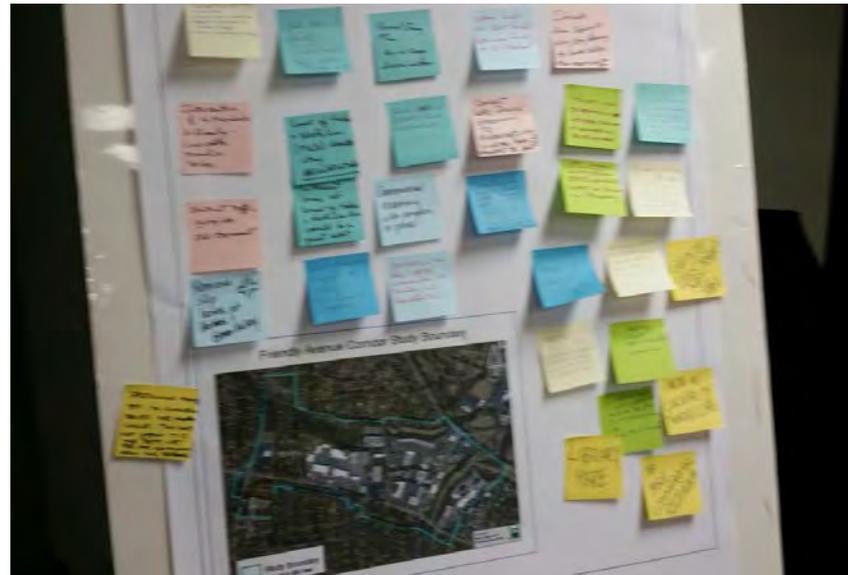
- “(1) Whether or not to allow further commercial development, (2) Protecting nearby neighborhoods from increased traffic and congestion.”
- “(1) Enforcement of current zoning to prevent retail sprawl, (2) Not allowing homeowners to let their properties deteriorate as an excuse for selling to shopping center developers.”
- “(1)Increased traffic, (2) Pressure for more commercial development on both sides of Friendly.”
-

## Comments from First Public Meeting, February 2016

Two public meetings were held at First Lutheran Church on Friendly Avenue. Both meetings were drop-in style in order to answer questions, get feedback and facilitate conversation between attendees with City staff and each other.

The first meeting was held on February 23, 2016. Over 60 people attended the meeting, which occurred during the period in which the first survey was open. Attendees reviewed information from the Existing Conditions Report and were asked to comment on what they saw as the corridor's assets, threats to the corridor, and opportunities for improving the corridor. Comments from the meeting were generally consistent with those found in the online survey and are contained on the following pages.

The second meeting took place on August 18, and was followed by a second online survey. The focus of this meeting was to review the recommendations of the plan. Comments and suggestions have been incorporated into the plan where possible.



<u>Question</u>	<u>Responses</u>
<p><i>What is the greatest asset to the study area? An asset is anything that adds value to the community, for instance parks, sidewalks or a prominent business.</i></p>	Residential calmness & areas not cornered is greatest asset
	Friendly shopping center
	Lake Daniel Greenway Connection
	Community & life style within the city limits our home!!
	First Lutheran Church
	Greenways developed. Residential areas towards Lindley Park area
	Bog & Bicentennial Garden
	Convenience to everything
	Mixed use, full service
	Friendly shops & Friendly shopping center -- Bicentennial park and Bog Park
	<u>Balance!</u> Shopping, residential, schools, churches, hospitals, banks. Avoid more shopping
	First Lutheran Church
	Sidewalks
	Bog Garden
	Existing residential areas
	Parks nearby
	Tree canopy
	Past office convenient to large # of people
	<u>Stable neighborhoods</u> & Friendly Center, Bog and Bicentennial Gardens
	Low traffic thru the Friendly Corridor, even at Christmas time.
	Friendly Center in general
	High end residences within walking distance
	Make Friendly center build more connected Ped-paths that do not just end or are not connected
	Parks, gardens and neighborhoods. But we need better connections
	The two parks are a great asset to the area!! Need sidewalks on both sides of Hobbs from Friendly Ave to the Parks.
	Neighborhood Cohesion. Old Starmount
	Parks are great but sidewalks to Friendly are needed
	Schools, parks & churches + HOME!

Question	Responses
<p>What is the greatest opportunity in the study area that could potentially benefit the community? An example might be improvements to a particular intersection. What are the most important issues facing the area in the next 5 years?</p>	<p>Rezoning from residential to commercial raises the property value. This does not mean it is the "best use". For the community only the developer</p> <p>W. Friendly sidewalks + islands in 2006 positive. Enforce ordinance in nearby stable neighborhoods - no institutional parking lots</p> <p>We would love to see a bike path connecting the existing bike path by Wesley Long to the bike path across Battleground Ave. We would love to see better (more commuter paths) sidewalks in Friendly Center</p> <p>Holden needs to remain the western boundary of commercial development. Negative impact from commercial development west of Holden on Friendly.</p> <p>Intersection of w. Avondale + Friendly - cross walks, tunnel or bridge obstruct traffic going into old Starmount</p> <p>Corner of Hobbs + Northline (PUD) should stay RESIDENTIAL. Retirement home at corner of Hobbs &amp; Northline Ave would be a great asset</p> <p>Build the proposed Elam Bike/Ped connector</p> <p>Build a lot more commercial stuff so Friendly is as attractive as High Point Road</p> <p>YMCA AT CORNER OF NORTHLINE</p> <p>NO MORE COMMERCIAL REZONING</p> <p>LIBRARY HERE</p> <p>No more commercial rezoning</p> <p>No more commercial development west of Hobbs!</p> <p>Making all uses accessible to all (transit, mixed use, etc.)</p> <p>Sidewalk from Fairway Dr. along Benj. Parkway to Green Valley. Allow access to Lake Daniel Park</p> <p>Decent, accurate traffic studies</p> <p>We live in a house in Starmount but would consider moving to a high rise (luxury with amenities including pool) if someone built and sold/rented 3 BR units</p> <p>Dedicated lanes of Holden Rd @ Friendly Ave for left then + right</p> <p>Connect Lake Daniel Greenway to Arboretum - Lindley Park, Market St., Ballpark</p> <p>Commercial rezoning with no plan in place</p>

<b><u>Questions</u></b>	<b><u>Responses</u></b>
<i>What other kinds of activities might you be interested in participating in if they were available in our community? During this planning process, are there other activities that we should conduct such as neighborhood walks to identify specific issues?</i>	Be content that our parks remain untouched -- that traffic is controlled and speeds enforced
	Pedestrian & bicycle safety improvements. Library. Parks/Green space
	Network of connecting bike trails and parks and completion of greenway
	More parks and a library
	Enforce the land development ordinance & maintain the residential thoroughfare of Friendly Ave.
	Add amenities to make bicycling safer
	Library. YMCA. Bike trail connector rest of green water downtown
	Take a walk from Lindley Park to Bog Garden. Note lack of sidewalks
	Parks need benches accessible to sidewalk & crosswalk -- no benches near side walk in bog garden
	If retail shops close, try to replace with a recreation center

<b>Question</b>	<b>Responses</b>
<p><i>What is the greatest opportunity in the study area that could potentially benefit the community? An example might be improvements to a particular intersection. What are the most important issues facing the area in the next 5 years?</i></p>	<p>Listen to homeowners (masses) to stop rezoning - Plan only benefitted 6 homeowners</p> <p>Protected turn stop light @ intersection of Friendly &amp; W. Avondale Dr.</p> <p>Sidewalks both sides of Hobbs. Multifamily ok for Friendly Ave from Avondale to Green Valley. Multi family corner of Friendly + Elam</p> <p>Completion of the multi family residential construction at the corner of Hobbs Rd. and Northline.</p> <p>Completion of the bike path (need bike trails not roadway set aside lane) through out the study area and connected to network of bike path</p>
	<p>Plan for traffic of Hobbs &amp; Friendly Ave</p>
	<p>Keeping residential property that already exists - not creating more traffic</p>
	<p>CREATE LESS TRAFFIC <u>NOT</u> MORE</p>
	<p>Better crosswalks, a branch of the Greensboro Public Library, a YMCA in Friendly Center</p>
	<p>No rezoning for commercial interests</p>
	<p>Hobbs Rd needs sidewalks on both sides, a bike lane. Intersection of Northline needs to accommodate 18 wheeler trucks. More Pedestrian Friendly</p>
	<p>Remove slip lanes at Hobbs &amp; Green Valley</p>
	<p>Study area is <u>already</u> over retailed. Traffic problems not bike friendly</p>
	<p>Current zoning plan. No rezoning desired in area</p>
	<p>Speed bumps on W. Avondale between Friendly &amp; W. Market</p>

<u>Question</u>	<u>Responses</u>
<p><i>What is the greatest threat to the study area? What specific concerns do you have about increased development in or near the existing shopping center? Are there activities or improvements that could foster a stronger sense of connection between the commercial area and surrounding neighborhoods?</i></p>	<p>No left turn out of Hobbs/Friendly Proposal. Shopping center towards Friendly Center already happened to leave from Church Drive. Too close to intersection of Hobbs light. Traffic backs up from Holden light to Hobbs light</p> <p>Keep Holden Rd as the demarcation line of no more commercial west! Period.</p> <p>More accessible features specifically @ parks &amp; friendly center. Handicap spaces most convenient spot; not furthest away; curb cuts needed</p> <p>Too much commercial development. What is to stop the church from selling their property to developers? Parks, stores, restaurants, etc need to be accessible to disabled</p>
	<p>Do <u>not</u> overbuild or over plan. Empty buildings are detrimental to area (ex. New garden area). Development must be aesthetically pleasing, both the structures as well as parking and grounds.</p>
	<p>Greatest threat is a complicit city council, zoning board and planning department to commercial developers</p>
	<p>Very important to stick to plan for multi-family residences. Avoid rezoning to commercial (Hobbs/Northline Rd)</p>
	<p>No more commercial development outside the mall</p>
	<p>Developers should reveal the site plan for Hobbs &amp; Friendly. Starmount will be sacrificed for more development</p>
	<p>People who do not listen to the residents of this area</p>
	<p>No more commercial development! Especially no commercial across from Harpers &amp; Belk. No commercial east of Wendover or west of Holden</p>
	<p>City is trying to ruin residential character of Friendly Ave corridor*!.</p>
	<p>Retail encroachment. An expanding shopping center which is not needed.</p>
	<p>More traffic, more commercial development which encroaches on residential areas. These are also concerns</p>

<u>Question</u>	<u>Responses</u>
<p><i>What is the greatest threat to the study area? What specific concerns do you have about increased development in or near the existing shopping center? Are there activities or improvements that could foster a stronger sense of connection between the commercial area and surrounding neighborhoods?</i></p>	<p>Turning into Battleground traffic congestion. Loss of neighborhoods integrity.                      Better foot traffic                      Destroying vegetation                      Over-development                      Do not change Holden corner (doc prop.) to business V. Kerr                      Enforce LDO ordinances to preserve stable neighborhoods                      NO MORE REZONING IN THIS AREA!</p>
	<p>Make all ped crossings change light w/the traffic lights. It gives information to non-peds about time to change in light and you don't have to wit through a cycle waiting for green</p>
	<p>We do not want stores that would change the atmosphere (pawn shops, liquor stores, discount stores)</p>
	<p>Friendly Ave is next Daytona 500</p>
	<p>Property west of Holden Rd should stay residential!</p>
	<p>Make pedestrians and mass transit a priority</p>
	<p>Good idea of using the corner of Hobbs-Northline as a retirement home or something similar</p>
	<p>No commercial development across from BB&amp;T, Whole Foods, Harpers, Belk</p>
	<p>More commercial development in the already approved (corner of Hobbs/Friendly)</p>
	<p>Bus stops with benches &amp; shelters</p>
	<p>Too much commercial use property. Out of balance with residential areas</p>
	<p>Excess traffic from outside the area</p>
	<p>Will brick wall continue from Wesleyto Hobbs?</p>
	<p>Rezoning away part of Hobbs Rd will make Hobbs a huge cut thru to New Garden</p>
	<p>Traffic directly coming from shopping onto w/Avondale &amp; old Starmount</p>
	<p>Ruining Residential character of Friendly Ave (soon to look like Battleground rd.)</p>
	<p>Retail encroachment to the south of Friendly in old Starmount</p>
	<p>Threat is from commercial rezoning -- too late on Hobbs</p>
	<p>No more commercial development. Please keep green space</p>

Thoroughfares	Street Functions Well	Street is Problematic	Comments
Greenwood Dr.	0	0	More transit needed downtown No shelters @ some bus stops; elderly population that take bus
Friendly Ave.	2	2	<ul style="list-style-type: none"> <li>• Bus stops on S side of Friendly (hard to cross)</li> <li>• Lack of pedestrian protection on sidewalk</li> <li>• Do not widen Friendly Ave. There is no enforcement of speeds on Friendly Ave.</li> <li>• Traffic is a nightmare now. PLEASE DO NOT WIDEN FRIENDLY. SPEED IS BAD.</li> <li>• Take Friendly down to one lane each with a bike lane</li> <li>• Left - turn phase WB Friendly</li> <li>• Create new intersection into Friendly Shopping Center and have delivery trucks enter through here, or Pembroke. Not residential</li> </ul>
Holden Rd.	0	0	<ul style="list-style-type: none"> <li>• There is no enforcement of speeds on Holden Rd.</li> <li>• Sidewalks are rumored on N. Holden. This would increase walkability?</li> </ul>
Bryan Blvd.	0	0	There is no enforcement of speeds on Bryan Blvd.
N. Elam Ave.	0	0	Elam Bike/Ped connector (proposed) (green dots)
Hobbs Rd.	0	0	<ul style="list-style-type: none"> <li>• Sidewalk connection on Hobbs b/w Friendly &amp; Northline</li> <li>• Why not use Hobbs to enter development</li> <li>• Restripe Hobbs Rd. for left turn into Hobbs Landing</li> <li>• The proposed change to the right lane will back up traffic on Hobbs Rd.</li> </ul>
Pembroke Rd.	0	1	<ul style="list-style-type: none"> <li>• Create new intersection into Friendly Shopping Center and have delivery trucks enter through Pembroke</li> <li>• Speed limit</li> <li>• Someone is going to have an accident in this P.O. parking lot. Very difficult to pull out on Pembroke Rd.</li> </ul>
Avondale Ave.	0	0	Get rid of all the speedy right turns
Northline Ave.	0	1	Why not make Friendly Centre use a parking garage instead? You'd free up a lot of parking lots

Thoroughfares	Street Functions Well	Street is Problematic	Comments
Green Valley Rd.	4	0	<ul style="list-style-type: none"> <li>• Need crosswalk from shopping center to Sun Trust Bank. Dangerous to cross Green Valley Rd. on foot.</li> <li>• Crossing Green Valley Rd. to the new Belk crossing is very dangerous. Possible underground walkway</li> <li>• More sidewalks to improve walkability, more connected bike trails</li> </ul>
Friendly Center Rd.	0	0	No commercial development across from Whole Foods + Friendly Center
N. Elam Bike Trail Connector	17	0	
Trail east of W. Wendover	0	2	

Hobbs Rd. Intersections	Good Intersection	Problem Intersection	Comments
Hobbs Rd. & Friendly Ave.	1	7	<ul style="list-style-type: none"> <li>• Due to increased traffic from Hobbs/Friendly now shopping center will be a pedestrian hazard</li> <li>• If the site is developed w/o a turnlane from Friendly, it will slow up traffic. I can't see a turn lane right after a junction (Friendly-Hobbs)</li> <li>• When corner of Hobbs and Friendly is developed we will need a light on Friendly between Hobbs + Holden. Like the light into the shops on Friendly. Do not use Hobbs Rd. for entry + exit</li> <li>• Crosswalk light is too fast</li> <li>• Left turn difficulty from W. Friendly to Hobbs</li> <li>• Turn lane at Hobbs and Friendly.</li> <li>• No bike lanes</li> <li>• Change turn lanes from Hobbs onto Friendly NOW</li> </ul>
Hobbs Rd. & Bog Garden	0	0	Will need to remove on-street parking on Hobbs Rd. at the park (bog garden)
Hobbs Rd. & Holden Ave.	0	0	When corner of Hobbs and Friendly is developed we will need a light on Friendly between Hobbs + Holden
Hobbs Rd. & Starmount Farms	1	3	<ul style="list-style-type: none"> <li>• People do not stop at flashing light at Hobbs and Starmount Farms</li> <li>• People press the flashing to cross, but cars don't always stop</li> </ul>
Hobbs Rd. & Northline Ave.	0	2	<ul style="list-style-type: none"> <li>• Sidewalks at PUD area</li> <li>• Intersection improvements needed, particularly large trucks (delivery)</li> </ul>
Hobbs Rd. & Wedgedale Ave.	0	0	Traffic <u>will</u> cut through Hobbs & Wedgedale to access main streets

Friendly Ave. Intersections	Good Intersection	Problem Intersection	Comments
Friendly Ave. & Avondale Rd.	1	1	Avondale & Friendly Ave pedestrian safety turning from cars
Friendly Ave. & Friendly Center Rd.	0	1	
Friendly Ave. & N. Elam Ave.	2	3	Right turn from Friendly onto Elam (going east on Friendly). Very tight turn.
Friendly Ave. & Green Valley Dr.	0	1	<ul style="list-style-type: none"> <li>• Lower Speed from Holden to Green Valley on Friendly - Too much traffic worse than downtown where it's 20 MPH</li> <li>• Cannot access the Greenway from the street</li> </ul>
Friendly Ave. & Pembroke Rd.	0	2	
Friendly Ave. & Wedgedale Ave.	0	0	With new development at corner need third lane for right turn onto Friendly.
Friendly Ave. & N. Holden Rd.	0	3	Lower Speed from Holden to Green Valley on Friendly - Too much traffic worse than downtown where it's 20 MPH
Friendly Ave. & N. Lindell Rd.	1	1	Intersection needs to be re-worked. Too tight for turning.
Friendly Center Rd. & Old Starmount	0	0	Too much traffic into Old Starmount from Friendly Center

<b>Pembroke Rd. Intersections</b>	<b>Good Intersection</b>	<b>Problem Intersection</b>	<b>Comments</b>
Pembroke Rd. & N. Elam Ave.	0	0	Protected bike lane on both sides of Benjamin, Elam to Pembroke
Pembroke Rd. & Grandview Ave.	0	0	Post office crowded - no room for post office parking - cheesecake factory parking too?
Pembroke Rd. & Bog Garden	0	0	Parking @ Bog Garden extends to Pembroke -- No enforcement of "no parking here to corner" sign
Pembroke Rd. & Starmount Farm	0	1	
Pembroke Rd. & Northline Ave.	0	2	
Pembroke Rd. & Kathleen Ave.	0	1	

<b>Miscellaneous Intersections</b>	<b>Good Intersection</b>	<b>Problem Intersection</b>	<b>Comments</b>
Green Valley Rd. & Benjamin Pkwy	0	1	
Green Valley Rd. & Grandview Ave.	0	1	
N. Elam Ave. and Benjamin Pkwy.	1	0	I have to dismount my bike and then pull around child chariot to push the cross button and cross here. Button is in wrong spot.
Ramsgate Dr. & N. Holden Rd.	0	1	