



Ft. Sam Houston Area Regional Center Planning Team

Meeting #4

Housing and Economic Development

Thursday, September 22, 2022

Zoom

3:00 – 5:00 PM



Cambridge Systematics, Inc.

Bowtie

Economic & Planning Systems, Inc.

Auxiliary Marketing Services

Mosaic Planning and Development Services

Worldwide Languages

Able City

WSP

Ft. Sam Houston Area Project Team

- **City of San Antonio, Planning Department**

- Channary Gould, Project Manager
- David Powell, Project Manager

- **MIG**

- Krystin Ramirez, Project Manager
- Jonathan Tarr, Housing Subject Matter Expert

- **Economic & Planning Systems (EPS)**

- Matt Prosser, Executive Vice President



Timeline of Meetings

PT Meeting 1 (Apr. 26, 2022)

Orientation; Sub-Area Plan Overview; SWOT; Vision and Goals

Community Meeting 1 (June 16, 2022)

PT Meeting 2 (Jul. 21, 2022)

Confirm Vision & Goals; Land Utilization Analysis; Focus Area ID

PT Meeting 3 (Aug. 18, 2022)

Land Use (Housing & Economic Development Lens) (1 of 2)

PT Meeting 4 (TODAY!)

Housing & Economic Development (Based on Land Use) (1 of 2)

Community Meeting 2 (November 10, 2022)

PT Meeting 5 (Dec. 15, 2022)

Land Use (2 of 2), Housing and Economic Development (2 of 2)

PT Meeting 6 (Feb. 9, 2023)

Mobility (1 of 2)

PT Meeting 7 (Mar. 9, 2023)

Mobility, Focus Areas, Amenities & Public Space (1 of 2)

Digital Design Workshop (TBD – Week of April 13, 2023)

Community Meeting 3 (TBD - Week of May 18, 2023)

PT Meeting 8 (Jun. 22, 2023)

Review DDW; N’hood Profiles & Priorities; Amenities & Public Space (2 of 2)

PT Meeting 9 (Jul. 27, 2023)

Review of Maps; Plan Framework (1 of 2)

PT Meeting 10 (Aug. 24, 2023)

Plan Framework (2 of 2), Implementation Review

Community Meeting 4 (TBD - Week of Dec. 14, 2023)

PT Meeting 11 (Jan. 18, 2024)

Public Draft Review & Final Revisions, Process Feedback

Meeting Objectives

- Review Vision & Goals
- SARA Presentation
- Review Future Land Use Feedback
- Discuss Housing & Jobs Opportunities and Challenges
- Housing & Jobs Growth Allocation Activity
 - With projected population growth in the Regional Center...
 - How will we guide the addition of housing?
 - How will we guide the addition of job centers?

SA



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Vision & Goals

Draft Vision

The Fort Sam Houston Area Regional Center is a high-quality place to live, work, learn, ~~train,~~ and play with safe and distinct neighborhoods connected to, and are well integrated with the military base, AT&T Center, and vibrant employment areas. This mosaic of San Antonio's past, present and future is woven together with a robust trail and greenway system providing local and regional transportation and recreation opportunities; and a well-connected network of shaded roadways and streets that are well-maintained; and walkable, bikeable and transit-friendly mixed-use districts that serve local residents during non-event times and visitors during events.

Draft Goals

- Promote quality development that is compatible with existing neighborhoods and includes additional housing options for military and non-military families and households.
- Improve existing connections and create new connections and crossings that are truly multimodal, aesthetically pleasing and provide stormwater benefits.
- Provide more greenways, trails and recreational amenities throughout the Regional Center and connecting to nearby areas.
- Strategically locate additional medium and higher density mixed use development to create districts that double as locally serving hubs of small business and visitor entertainment destinations.
- Facilitate overall development patterns that include local employment and entertainment opportunities.
- Improve comfort, safety and aesthetics throughout the Regional Center with trees, other urban greening, and integration of sustainable infrastructure.

The logo for 'SA TOMORROW' features the letters 'SA' in a bold, white, sans-serif font on the left. To its right is a circular icon with a white border, containing a stylized orange and white graphic of a city skyline with a tower and a circular arrow. To the right of the icon, the word 'TOMORROW' is written in a large, bold, white, sans-serif font. The background is split: the left side is orange with a faint city skyline, and the right side is dark grey with a large, faint circular arrow graphic.

SA TOMORROW

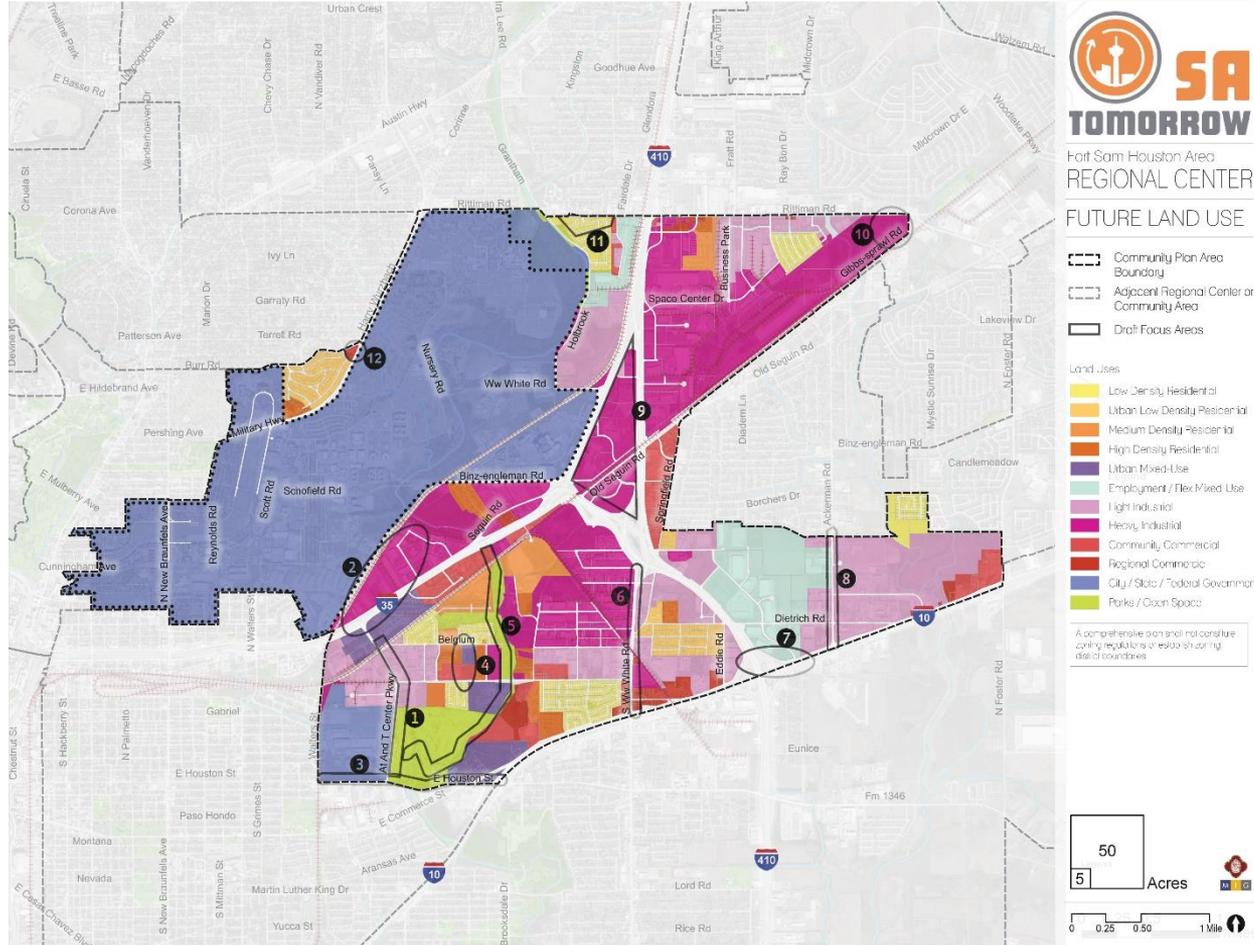
Guest Presentation:
San Antonio River Authority (SARA)
Karen Bishop

SA TOMORROW

Draft Future Land Use Plan

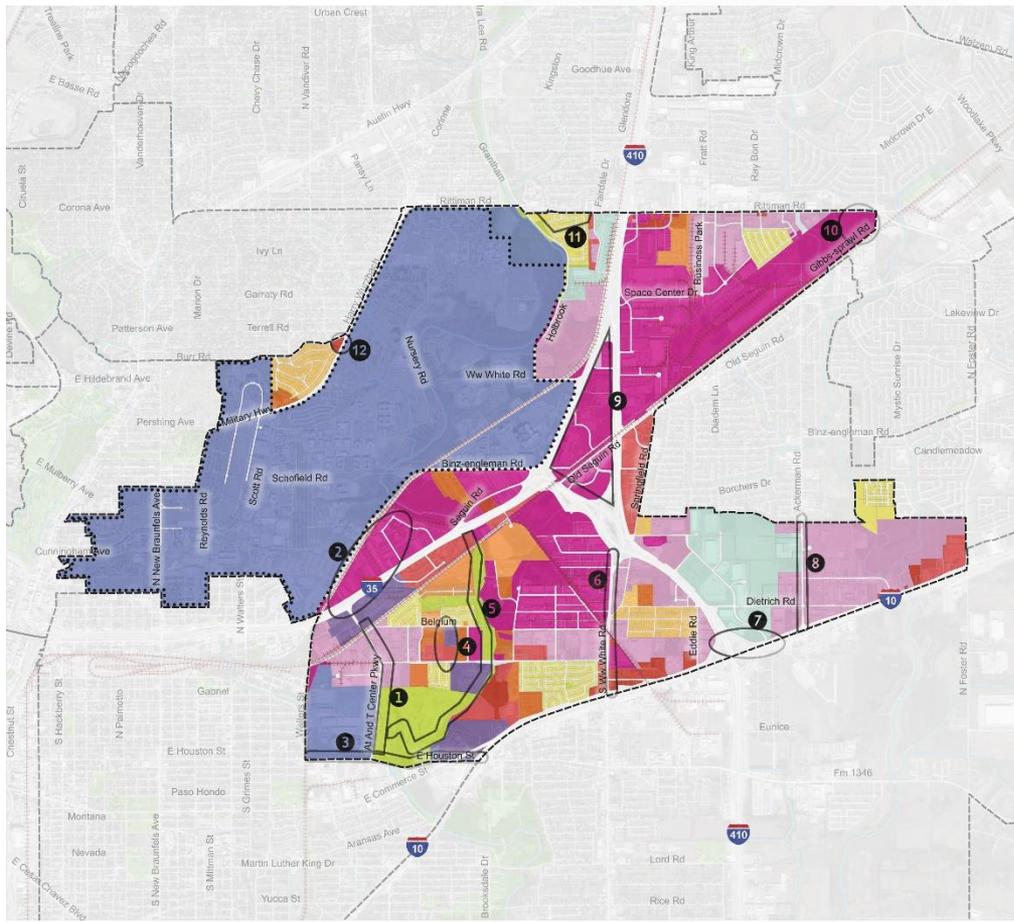


Draft Future Land Use Map for the Ft. Sam Houston Area Regional Center



Priority Future Land Uses Identified for the Ft. Sam Houston Area Regional Center

- RESIDENTIAL ESTATE
- LOW DENSITY RESIDENTIAL
- URBAN LOW DENSITY RESIDENTIAL
- MEDIUM DENSITY RESIDENTIAL
- HIGH DENSITY RESIDENTIAL
- NEIGHBORHOOD MIXED-USE
- URBAN MIXED-USE
- REGIONAL MIXED-USE
- EMPLOYMENT FLEX MIXED-USE
- BUSINESS INNOVATION MIXED-USE
- NEIGHBORHOOD COMMERCIAL
- COMMUNITY COMMERCIAL
- REGIONAL COMMERCIAL
- LIGHT INDUSTRIAL
- HEAVY INDUSTRIAL
- CITY/STATE/FEDERAL GOVERNMENT
- PARKS AND OPEN SPACE
- AGRICULTURAL



SA TOMORROW
Fort Sam Houston Area REGIONAL CENTER
FUTURE LAND USE

- Community Plan Area Boundary
- Adjacent Regional Center or Community Area
- Draft Focus Areas

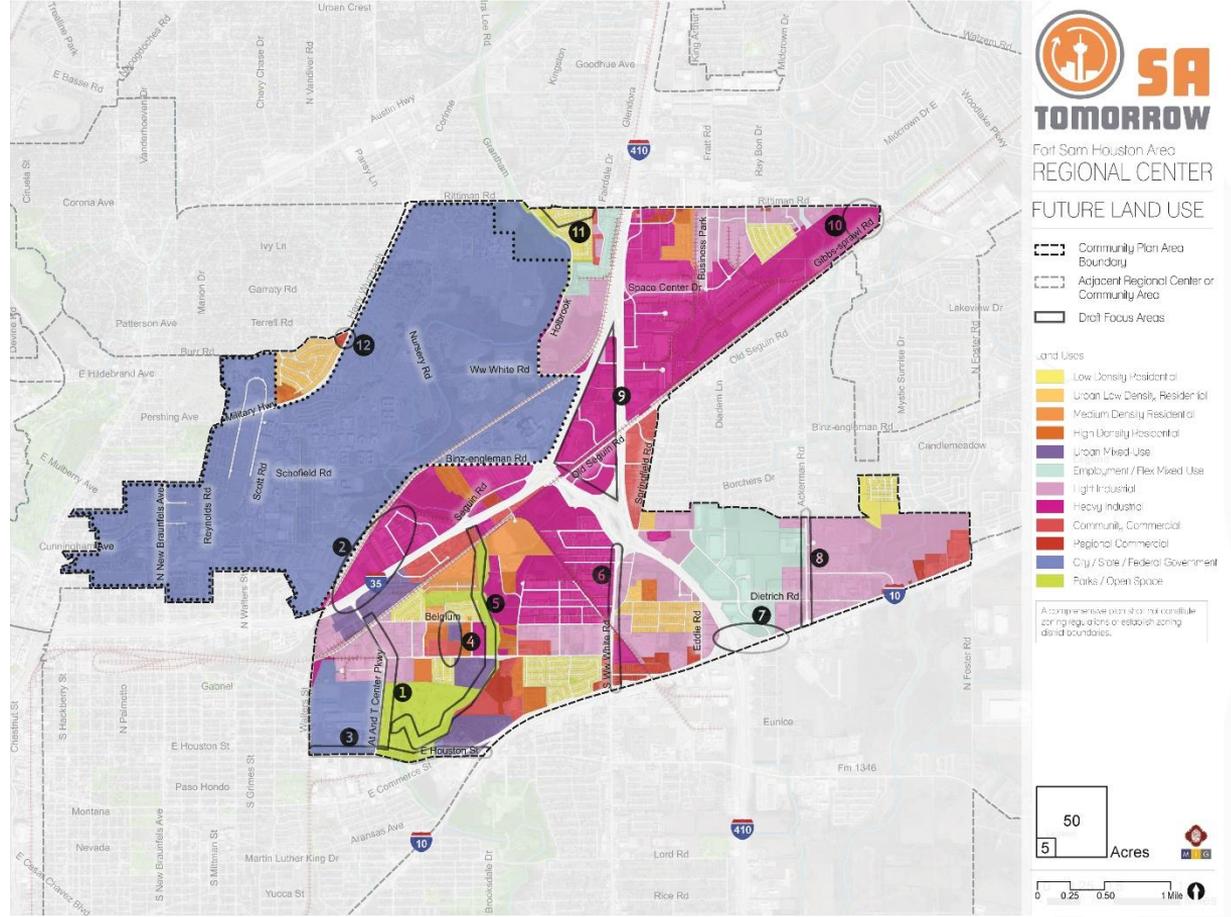
- Land Uses
- Low Density Residential
 - Urban Low Density Residential
 - Medium Density Residential
 - High Density Residential
 - Urban Mixed Use
 - Employment / Flex Mixed Use
 - Light Industrial
 - Heavy Industrial
 - Community Commercial
 - Regional Commercial
 - City / State / Federal Government
 - Parks / Open Space

A comprehensive proposal that considers zoning regulations or establish zoning district boundaries.

50 Acres

Future Land Uses Not Appropriate for the Ft. Sam Houston Area Regional Center

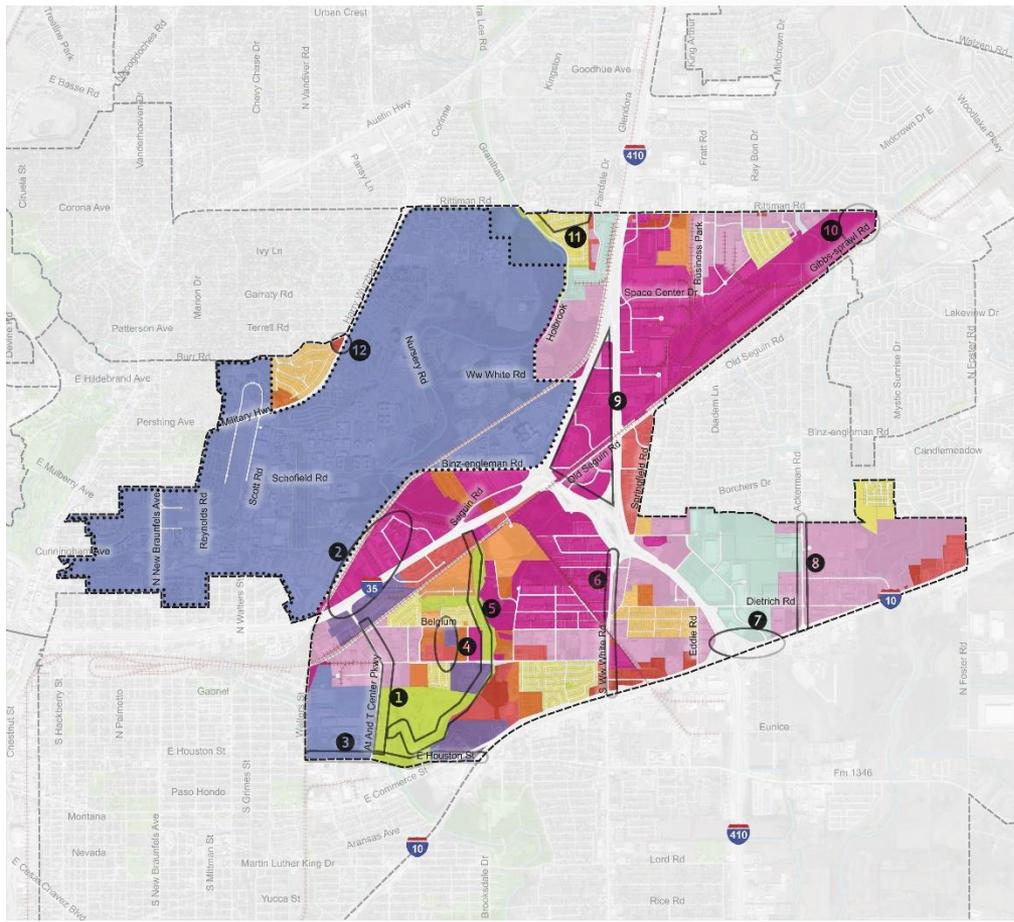
- RESIDENTIAL ESTATE** (Yellow arrow, circled in blue dashed line)
- LOW DENSITY RESIDENTIAL** (Yellow arrow)
- URBAN LOW DENSITY RESIDENTIAL** (Orange arrow)
- MEDIUM DENSITY RESIDENTIAL** (Orange arrow)
- HIGH DENSITY RESIDENTIAL** (Orange arrow)
- NEIGHBORHOOD MIXED-USE** (Purple arrow)
- URBAN MIXED-USE** (Purple arrow)
- REGIONAL MIXED-USE** (Purple arrow)
- EMPLOYMENT FLEX MIXED-USE** (Light green arrow)
- BUSINESS INNOVATION MIXED-USE** (Dark blue arrow)
- NEIGHBORHOOD COMMERCIAL** (Pink arrow)
- COMMUNITY COMMERCIAL** (Red arrow)
- REGIONAL COMMERCIAL** (Red arrow)
- LIGHT INDUSTRIAL** (Purple arrow)
- HEAVY INDUSTRIAL** (Magenta arrow)
- CITY/STATE/FEDERAL GOVERNMENT** (Blue arrow)
- PARKS AND OPEN SPACE** (Light green arrow)
- AGRICULTURAL** (Green arrow, circled in blue dashed line)



Land Uses We Do Not Need More of in the Ft. Sam Houston Area Regional Center

- RESIDENTIAL ESTATE
- LOW DENSITY RESIDENTIAL
- URBAN LOW DENSITY RESIDENTIAL
- MEDIUM DENSITY RESIDENTIAL
- HIGH DENSITY RESIDENTIAL
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Fort Sam Houston Area
REGIONAL CENTER
FUTURE LAND USE

- Community Plan Area Boundary
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A comprehensive proposal that considers zoning regulations or establish zoning district boundaries.

50 Acres

SA



TOMORROW

Planning Team Land Use Activity



Land Use Activity

SA TOMORROW
Fort Sam Houston Area Regional Center

Land Use and Focus Areas Activity

At this time, this activity is only available for Planning Team member participation. The activity is intended to continue our conversation from Planning Team Meeting #3 and allow Planning Team members to take a more in depth look and provide input on future land use designations within Focus Area boundaries.

The Fort Sam Houston activity center includes the Fort Sam Houston military base and also large parts of the City's older industrial lands along I-35. Fort Sam Houston is a designated Historic Landmark and one of the Army's oldest installations. Fort Sam is also home to the Brooks Army Medical Center, which is also the only US Department of Defense Level I Trauma Center in US. The activity center is home to over 62,000 jobs, of which 40,000 are military jobs.

VISION:
The Fort Sam Houston Area Regional Center is a high-quality place to live, work, learn, train, and play with safe and distinct neighborhoods connected to, and are well integrated with the military base, AT&T Center, and vibrant employment areas. This mosaic of San Antonio's past, present and future is woven together with a robust trail and greenway system providing local and regional transportation and recreation opportunities; and a well-connected network of shaded roadways and streets that are well-maintained; and walkable, bikeable and transit-friendly mixed-use districts that serve local residents during non-event times and visitors during events.

GOALS:

- Promote quality development that is compatible with existing neighborhoods and includes additional housing options for military and non-military families and households.

Navigation: >

Land Use Activity

SA Tomorrow Land Use Categories

Before you dive into providing Future Land Use recommendations, let's revisit the land use categories. Feel free to come back and reference this page any time during the activity.

Note that the information you enter on the following pages will not be erased if you come back to visit this page.



High Density Residential
Medium Density Residential
Urban Low Density Residential
Low Density Residential
Residential Estate

LAND USE CATEGORIES

RESIDENTIAL



- Includes houses and apartments and everything in between
- Different categories are used to describe the density of dwelling units
- Where people live

[CLICK HERE FOR RESIDENTIAL LAND USE CATEGORIES](#)



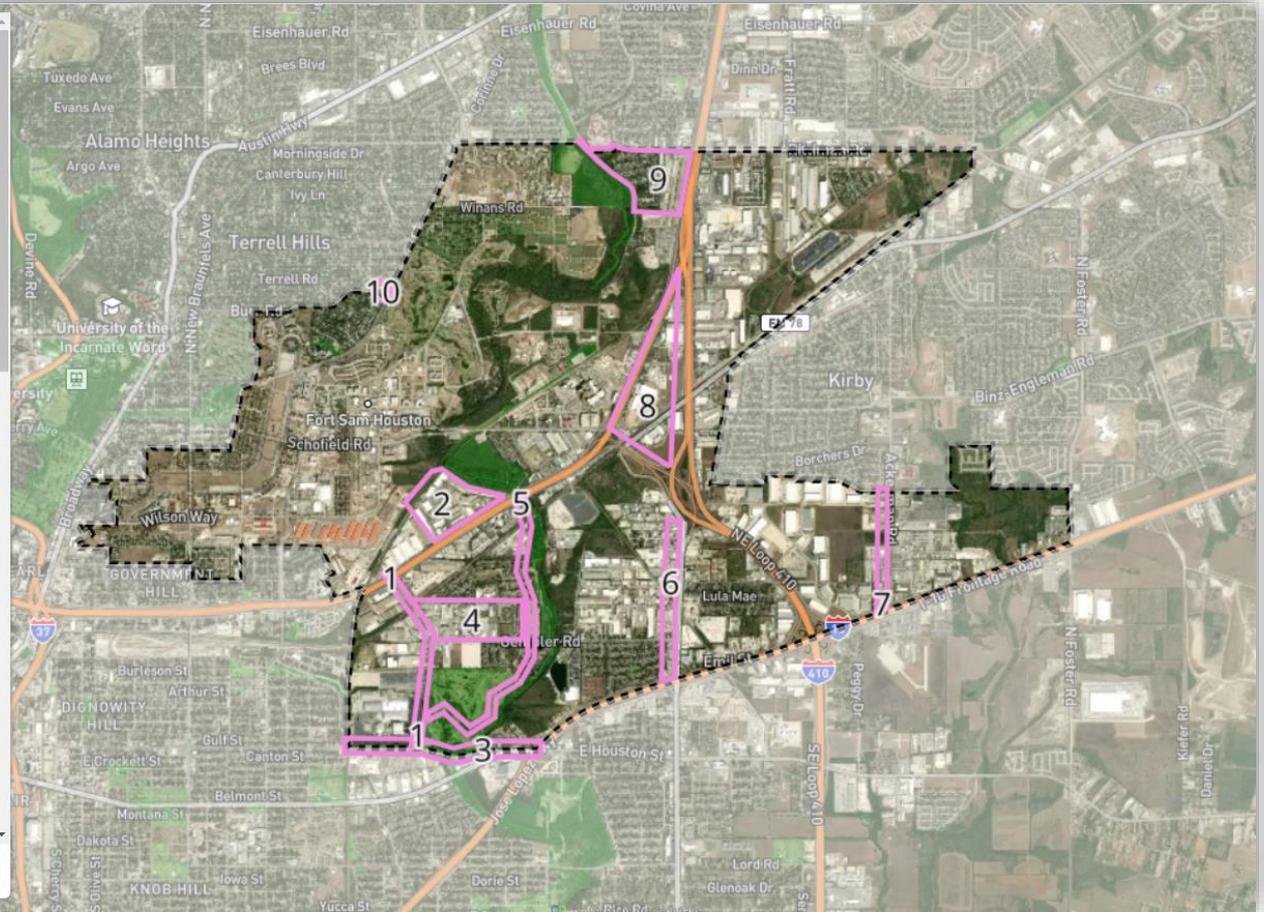
Neighborhood Commercial
Community Commercial
Regional Commercial

LAND USE CATEGORIES

COMMERCIAL



- Where people shop and work
- Includes retail establishments, offices and shopping centers
- Different categories are used to describe the



Land Use Activity

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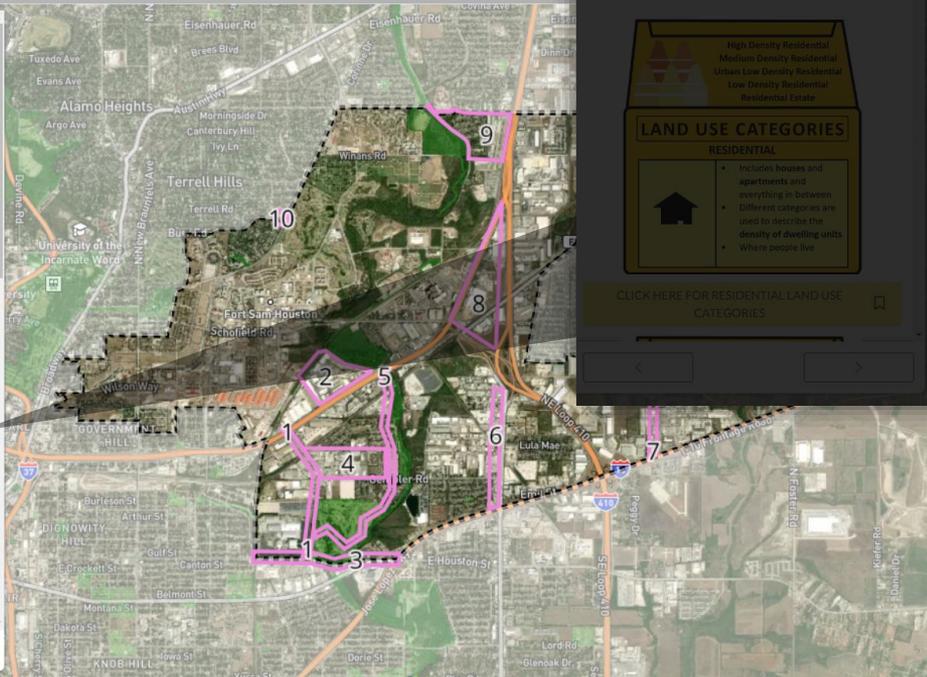
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[CLICK HERE FOR RESIDENTIAL LAND USE CATEGORIES](#)

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LAND USE RESIDENTIAL ESTATE

This category includes large lot single-family detached houses and should be located away from major arterials. Residential Estate can include certain nonresidential uses such as schools, places of worship, and parks that are centrally located for convenient neighborhood access.

Examples of Development Types:

- Large Lot Single-Family Detached Houses
- Conservation Subdivisions
- Individual Estate-Sized Lots



LAND USE LOW DENSITY RESIDENTIAL

This category includes single-family detached houses on individual lots and should not typically be located adjacent to major arterials. This land use category can include certain nonresidential uses such as schools, places of worship, and parks that are centrally located for convenient neighborhood access.

Examples of Development Types:

- Single-Family Detached Houses
- Manufactured Houses
- Modular Houses



Done ✓

Land Use Activity

Future Land Use Activity: Focus Areas

Now here is the fun part! The map on the side shows all of the focus areas we discussed in Planning Team Meeting #3. Use the Land Use Designation pins below to identify where appropriate, desired, and needed future land use designations should go within the focus areas.

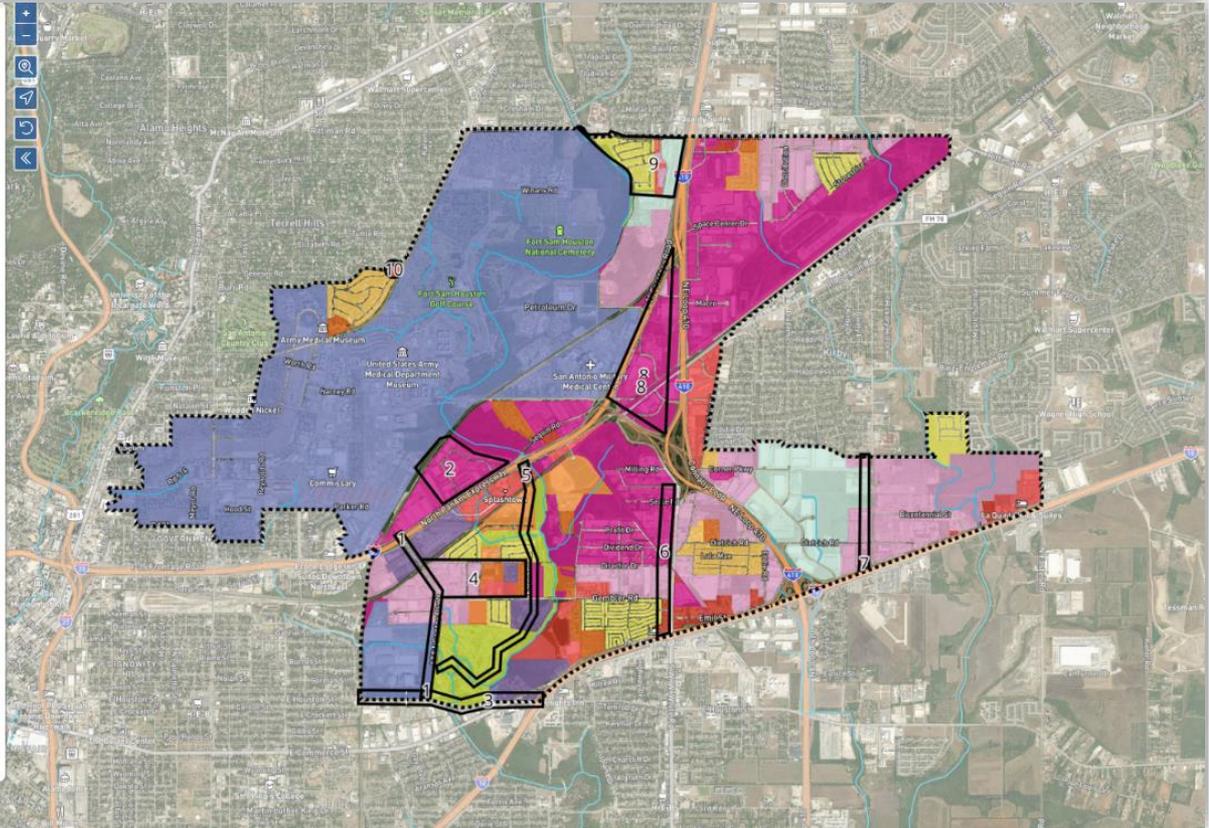
Instructions:

You can zoom in and out of the map using the +/- buttons on the right and move around the map using your mouse or buttons on the map.

To view the future land use map, choose it from the layer menu at the top right of the map screen.

Note: In later exercises we will explore the appropriate, desired, and needed future land use designations outside of these focus area boundaries.

Indicate the changes you would like to see by using the colored pins below



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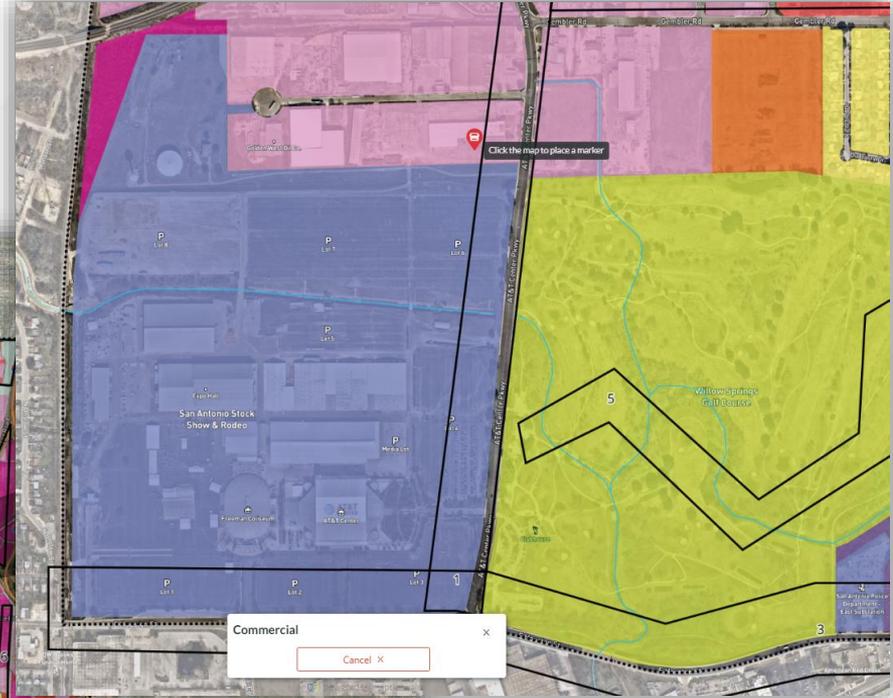
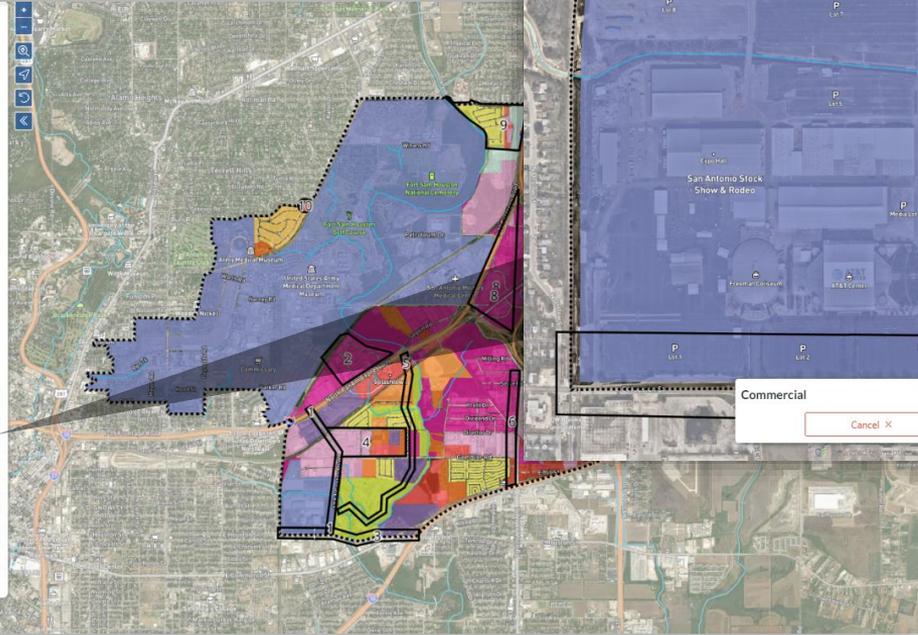
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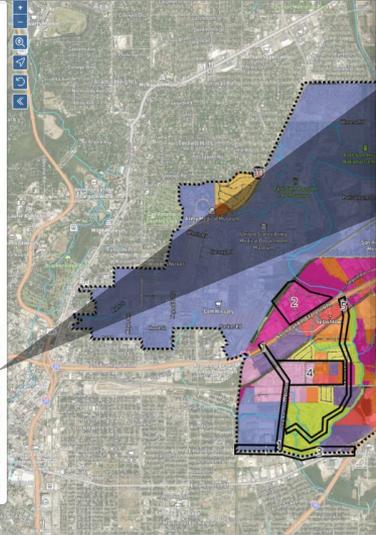
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Indicate the changes you would like to see by using the colored pins below

- Residential
- Commercial
- Mixed-Use
- Industrial
- Civic



Commercial

Select the Commercial Land Use Category you want at this location:

Neighborhood Commercial

LAND USE
NEIGHBORHOOD COMMERCIAL

This category includes smaller intensity commercial uses such as small-scale retail or offices, professional services, and convenience retail and services that are intended to support the adjacent residential uses. Neighborhood commercial uses should be located within walking distance of neighborhood residential areas.

Examples of Development Types:

- Small Scale Retail or Offices
- Convenience Retail and Services
- Professional Services

Community Commercial

LAND USE
COMMUNITY COMMERCIAL

This category includes offices, professional services, and retail uses that are accessible to bicyclists and pedestrians and linked to transit facilities. Community commercial uses are intended to support multiple neighborhoods, have a larger market draw than neighborhood commercial uses.

Examples of Development Types:

- Offices
- Restaurants
- Neighborhood Grocers
- Medical Clinics

Regional Commercial

LAND USE
REGIONAL COMMERCIAL

This category includes high intensity uses that draw customers from both adjacent communities as well as the larger metropolitan region.

Delete Done

Land Use Activity

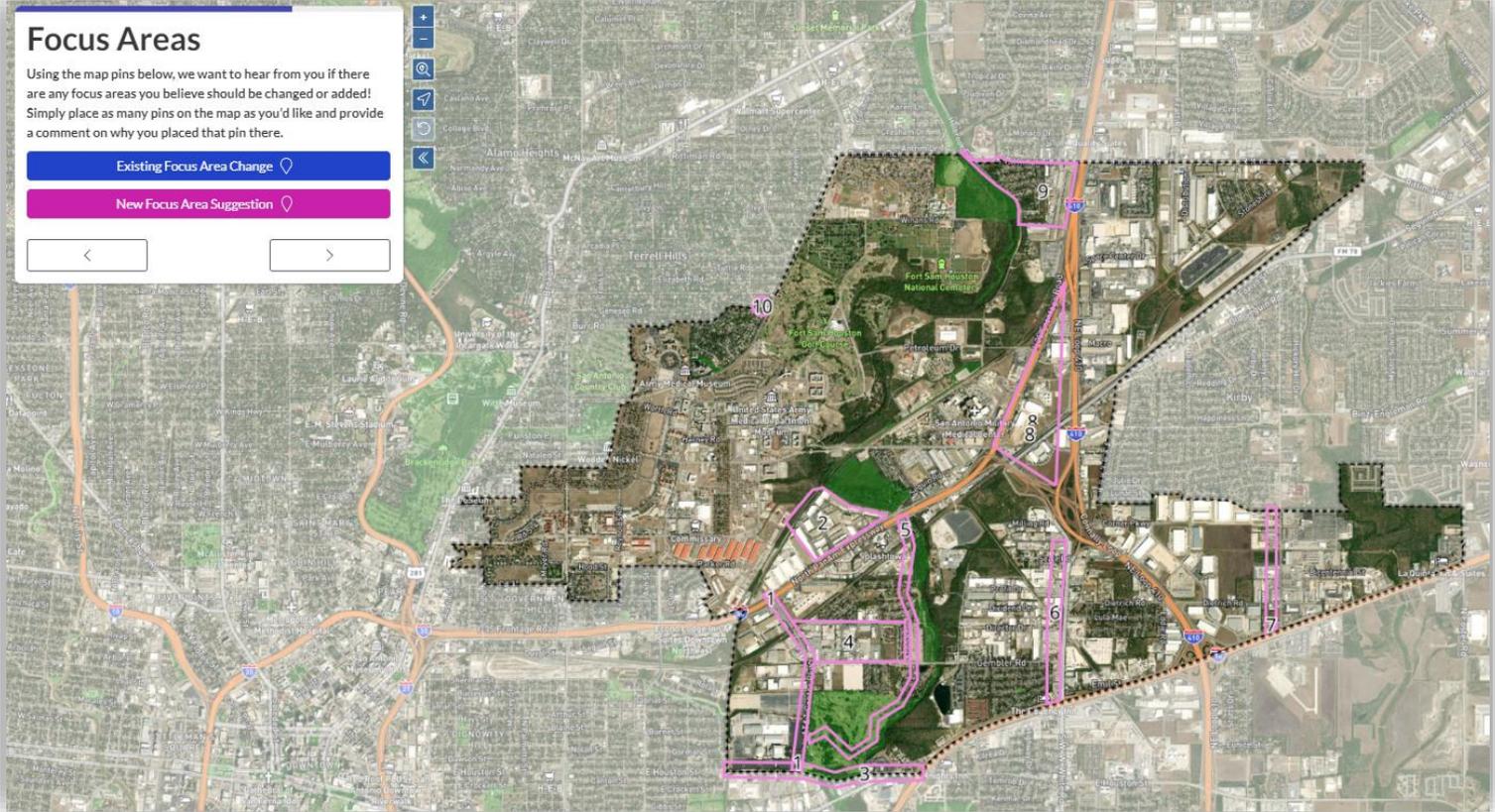
Focus Areas

Using the map pins below, we want to hear from you if there are any focus areas you believe should be changed or added! Simply place as many pins on the map as you'd like and provide a comment on why you placed that pin there.

[Existing Focus Area Change](#)

[New Focus Area Suggestion](#)

< >



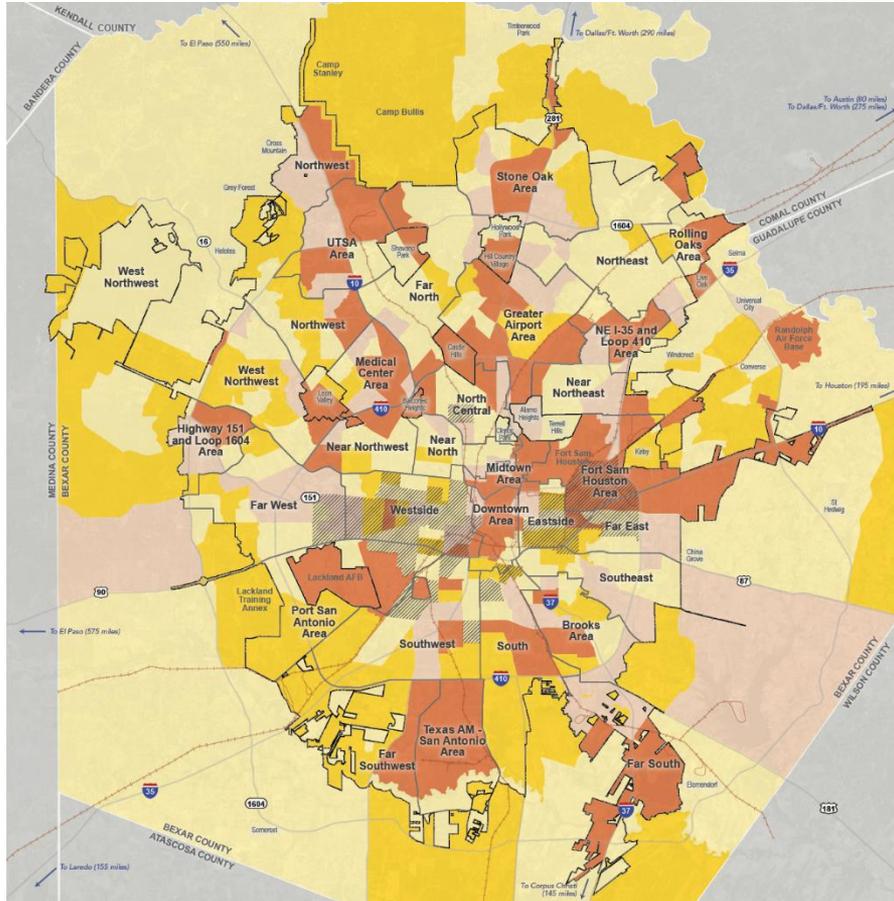
The image shows an aerial map of San Antonio, Texas, with several focus areas highlighted in purple and numbered 1 through 10. The map includes major roads like I-37 and I-10, and landmarks such as the Fort Sam Houston National Cemetery and the San Antonio River. A white overlay box in the top-left corner contains the text 'Focus Areas' and instructions for users to place map pins and provide comments. The box also features two buttons: 'Existing Focus Area Change' (blue) and 'New Focus Area Suggestion' (purple), along with left and right navigation arrows.

SA TOMORROW

Equity Atlas: Employment Access



Equity Atlas: Employment Access Map



LEGEND

- City Boundary
- Planning Sub-Area Boundary
- Major Highway
- Rail Line

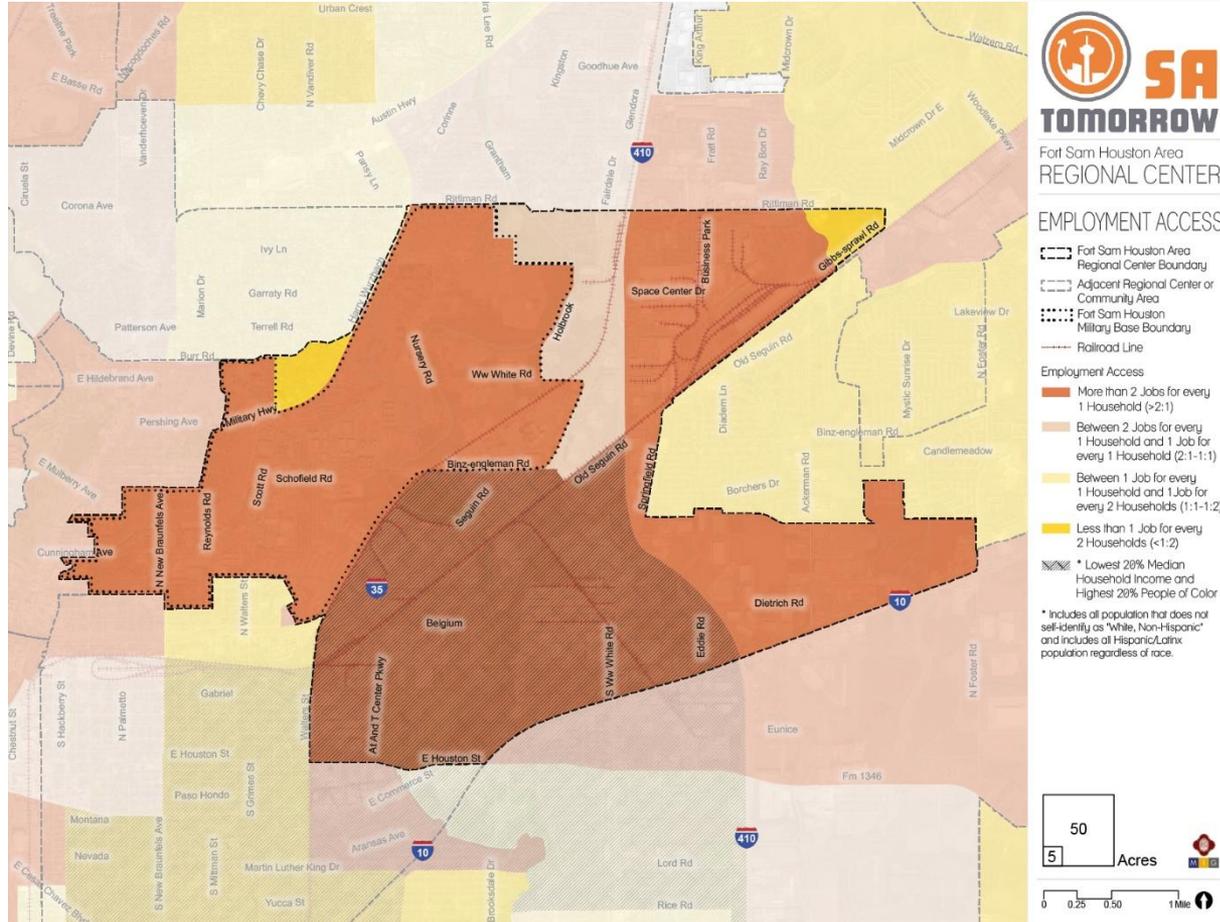
Employment Access

- More than 2 Jobs for every 1 Household (>2:1)
- Between 2 Jobs for every 1 Household and 1 Job for every 1 Household (2:1-1:1)
- Between 1 Job for every 1 Household and 1 Job for every 2 Households (1:1-1:2)
- Less than 1 Job for every 2 Households (<1:2)

* Lowest 20% Median Household Income and Highest 20% People of Color

*Includes all population that does not self-identify as "White, Non-Hispanic" and includes all Hispanic/Latinx population regardless of race.

Equity Atlas: Employment Access Map



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Housing and Economic Development



Population and Housing

Total Population (2022) | **18,421**

Total Households (2021) | **4,837**



Average Household Size

2.92 persons

2.69 - City of San Antonio Average



Median Age

25.6 years

34.5 years - City of San Antonio Average



Average Household Income

\$56,132

20% lower than City of San Antonio



Race and Ethnicity

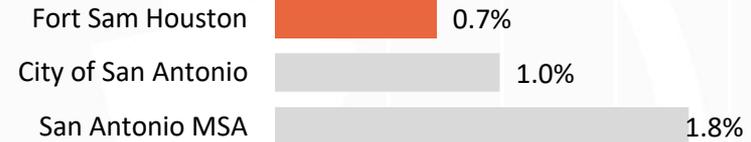
34% Hispanic-origin



Annual Population Growth | 2010-2021



Annual Household Growth | 2010-2021

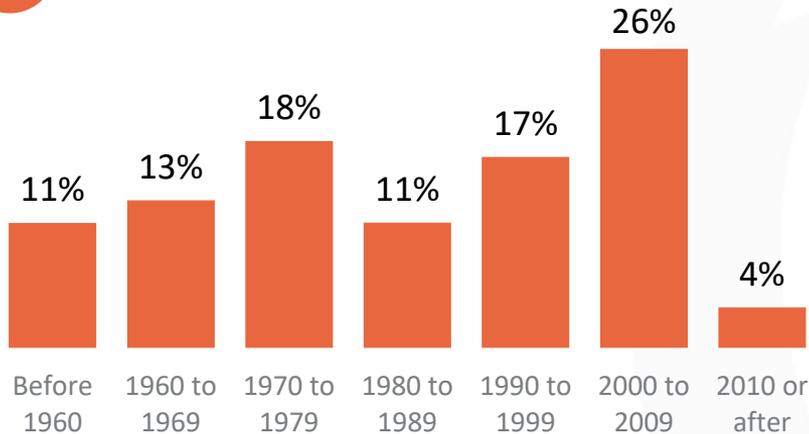


The Fort Sam Houston Area Regional Center has younger than average population, larger than average household sizes, and households have lower household incomes than the City overall.

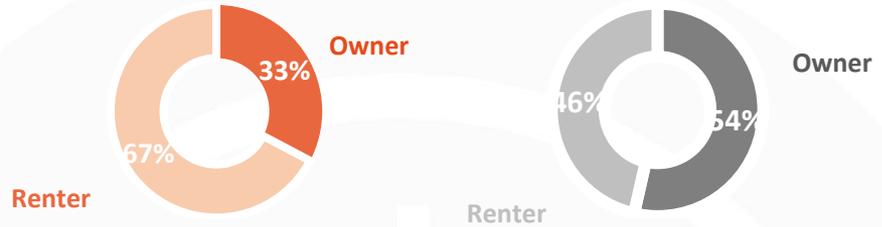
Housing Conditions

Total Housing Units (2021) | 5,477

Age of Housing Stock



Housing Tenure



67% of occupied housing units are **rented**
46% City of San Antonio Average

Units in Structure

44% of all housing units are single-family detached homes
62% City of San Antonio average

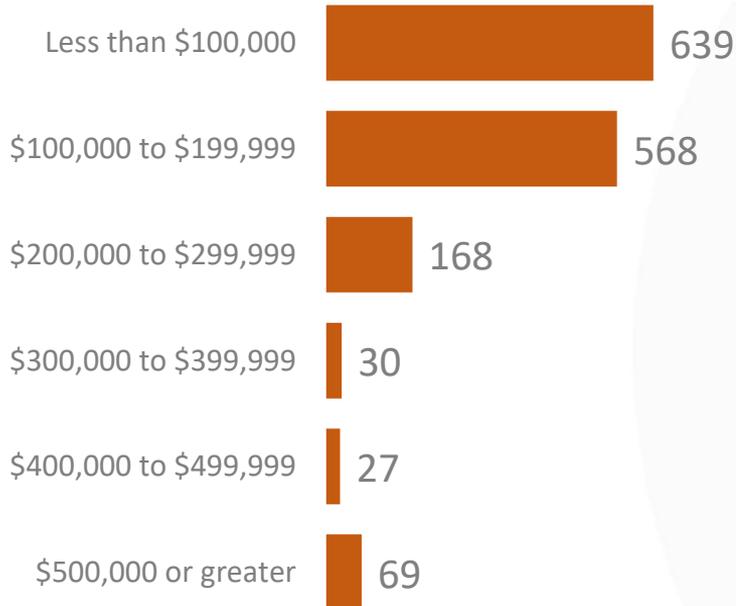
There has been continuous housing growth in the Regional Center over the past 60 years.

Housing Accessibility and Affordability



Owner-Occupied

80% of homes are valued less than and \$200,000



Average home listing price is around **\$192,153**
(78219 zip code)

City of San Antonio is around **\$301,000**

80% of Fort Sam Houston Area homeowners do not have a mortgage

37% Bexar County average



Owners Cost Burden

24% of homeowners are **cost burdened**, paying more than 30% of income towards housing

Housing Accessibility and Affordability



Renter-Occupied

Average rent for apartments in the Fort Sam Houston Area is **6%** less than the County average (CoStar data)



Housing costs in the Regional Center generally match the city and county-wide averages.

57% of rentals are **affordable** to a household earning the Citywide median income of **\$52,361** (Census data)

Since 2010, average monthly rents have increased by **\$361, slightly less** than the County growth overall

Average rent for new apartment units is **\$1,700 per month**

Employment

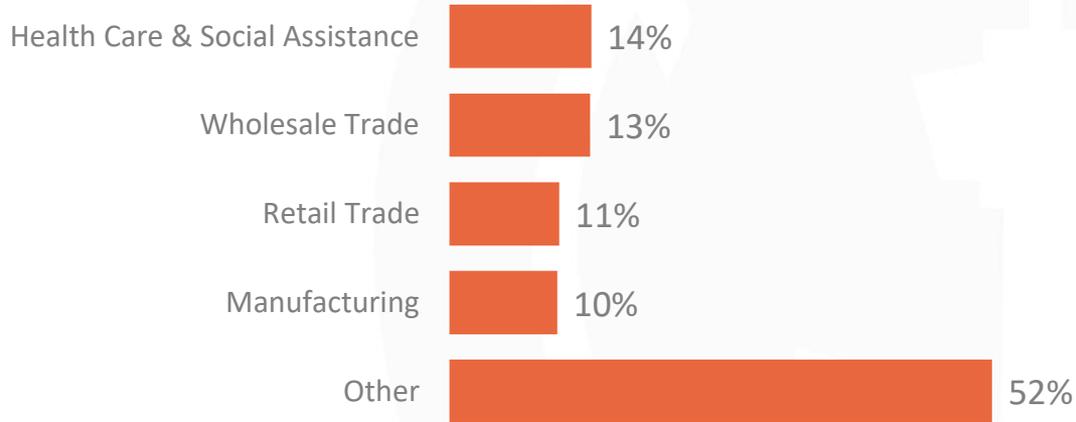
Total Employment (2021) | 24,000 (ESRI)

Total Employment (2010) | 54,600 (AAMPO)



Largest Employment Sectors

Health Care, Wholesale Trade and Retail Trade



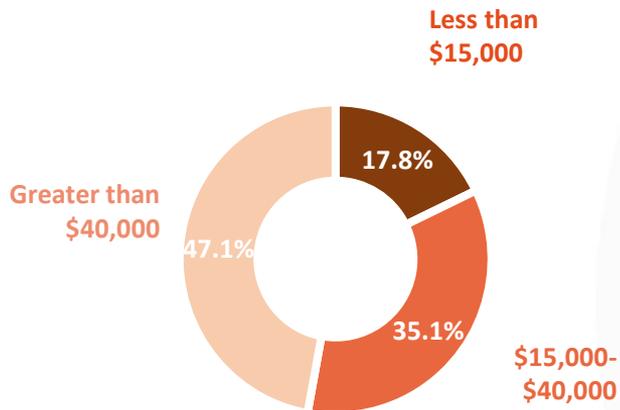
Note: Total employment for 2021 does not reflect jobs located at Fort Sam Houston

Workforce



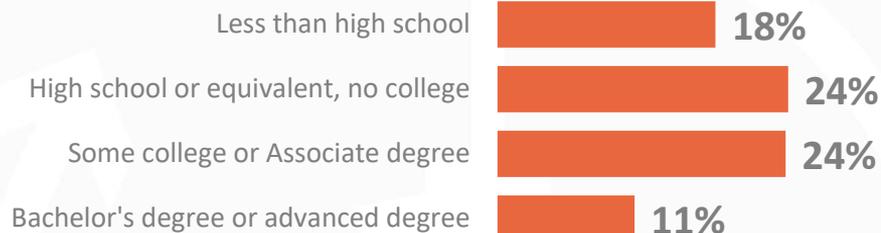
Wage Distribution

47% of workers earn more than \$3,333 per month (\$40,000 annually)



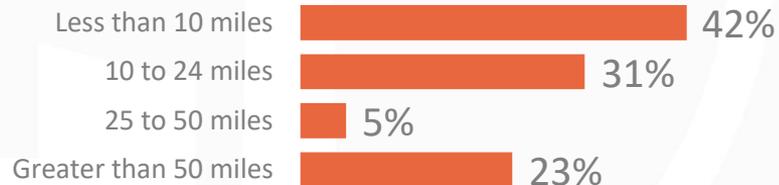
Education (2019)

35% of workers have some college or higher



Commuting Patterns (2019)

17% of workers live in the center



Real Estate Conditions

Commercial and Industrial Development



Office | Small Office Presence

708,460 sq. ft.

0 sf of new development
since 2012

0.6%

vacancy rate
10.8% Bexar County
average



Industrial | Logistics Hub

24.2 million sq. ft.

**3 million sf of new
construction** since 2012

4.2%

vacancy rate
4.8% Bexar County
average



Retail | Limited Retail Presence

665,000 sq. ft.

**4,500 sf of new
development** since 2012

2.0%

vacancy rate
4.1% Bexar County
average



Hotel | Growing inventory

15 hotels, **1,242** rooms

Lost 125 rooms since 2012

Housing Types and Affordability



Average Rental Rates for New Apartments =
\$1,460 to \$1,900 per month



Average Home Price for New Home
= \$260,000 to \$290,000

Typical Jobs/Wages and Affordability

Occupation	Average Annual Wage	Est. HH Income	Affordable Rent (based on wages)	Affordable Home Price (based on wages)
Production Workers	\$36,283	\$51,126	\$907	\$123,361
Waiter/Server	\$21,860	\$30,803	\$547	\$74,324
Retail Salesperson	\$27,970	\$39,412	\$699	\$95,098
Light Truck/Delivery Services Drivers	\$40,000	\$56,364	\$1,000	\$136,000
Registered Nurses	\$72,270	\$101,835	\$1,807	\$245,718
Physicians and Surgeons, All Other	\$192,000	\$270,546	\$4,800	\$652,800
Average for Area		\$61,455	\$1,274	\$208,947

Source: US BLS; EPS

SA



TOMORROW

Growth Allocation Activity

Factors for Fort Sam Houston Area

Regional Center Growth Goals:

- **60% of Jobs (forecast is 50%)**
- **20% of Housing Units**
- **50% of Multifamily Units**



New Housing Development

Approx. 903 total units since 2010
including 795 apartment units



Employment Growth | 2010-2040

22,800 new jobs
760 jobs per year



New Employment since 2010

7,712 new jobs (US Census LEHD 2010 to 2019)
Approx. 857 jobs per year



Household Growth | 2010-2040

1,800 new housing units
60 new units per year

Housing Allocation



Single Family Detached

- Est. of 200 units
- 1 piece = 100 units
- 100 acres per piece

Piece Color is **small yellow**

- 2 pieces to allocate



Attached/Townhomes

- Est. of 200 units
- 1 piece = 100 units
- 42 acres per piece

Piece Color is **small orange**

- 2 pieces to allocate



Garden Multifamily

- Est. of 700 units
- 1 piece = 100 units
- 20 acres per piece

Piece Color is **Large Yellow**

- 7 pieces to allocate



Urban Multifamily

- Est. of 700 units
- 1 piece = 100 units
- 10 acres per piece

Piece Color is **Large Orange**

- 7 pieces to allocate

Employment Allocation



Retail

- Est. 750 jobs
- 1 piece = 1,000 jobs
- 20 acres per piece

Piece Color is **red**

- 1-2 piece to allocate



Industrial/Flex

- Est. 9,000 jobs
- 1 piece = 1,000 jobs
- 50 acres per piece

Piece Color is **grey/black**

- 9 piece to allocate



Office/Education/Health

- Est. 2,250 jobs
- 1 piece = 1,000 jobs
- 10 acres per piece

Piece Color is **blue**

- 2-3 pieces to allocate



Hospitality/Entertain.

- Est. 3,000 jobs
- 1 piece = 1,000 jobs
- 15 acres per piece

Piece Color is **pink**

- 3 pieces to allocate

The graphic features the text 'SA TOMORROW' in large, bold, white sans-serif font. The 'SA' is positioned to the left of a circular icon containing a stylized tower and a circular arrow. To the right of the icon, the word 'TOMORROW' is written in a larger font size. Below 'TOMORROW', the words 'Next Steps' are written in a smaller, white sans-serif font. The background is split: the left side is orange with a city skyline, and the right side is dark grey with a large, faint circular arrow graphic.

SA TOMORROW

Next Steps



Next Steps

- Maptionnaire activity – look out for an email with link
- Microsoft Form
- Next Planning Team Meeting(s):
 - Community Meeting #2 – Thursday, November 10, 2022
 - Planning Team Meeting #5 (Refine Land Use, Housing & Economic Development) – week of 12/12/22
- Questions?
 - Channary Gould or Dave Powell, City of San Antonio
 - channary.gould2@sanantonio.gov or David.Powell@sanantonio.gov
 - (210) 207-**5446** (Channary) or **0244** (Dave)



Ft. Sam Houston Area Regional Center Planning Team

Meeting #4

Housing and Economic Development

Thursday, September 22, 2022

Zoom

3:00 – 5:00 PM



Cambridge Systematics, Inc.

Bowtie

Economic & Planning Systems, Inc.

Auxiliary Marketing Services

Mosaic Planning and Development Services

Worldwide Languages

Able City

WSP