

# What's Next at the Local Level





# What's Next at the **Local Level**



# ABOUT THE URBAN LAND INSTITUTE

The Urban Land Institute is a 501(c)(3) nonprofit research and education organization supported by its members. Founded in 1936, the Institute now has members in 95 countries worldwide, representing the entire spectrum of land use and real estate development disciplines working in private enterprise and public service.

As the preeminent multidisciplinary real estate forum, ULI facilitates an open exchange of ideas, information, and experience among local, national, and international industry leaders and policy makers dedicated to creating better places.

The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. ULI is committed to:

- » Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs;
- » Fostering collaboration within and beyond ULI's membership through mentoring, dialogue, and problem solving;
- » Exploring issues of urbanization, conservation, regeneration, land use, capital formation, and sustainable development;
- » Advancing land use policies and design practices that respect the uniqueness of both built and natural environments;
- » Sharing knowledge through education, applied research, publishing, and electronic media; and
- » Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges.

ULI's priorities are

- » Promoting intelligent densification and urbanization;
- » Creating resilient communities;
- » Understanding demand and market forces;
- » Connecting capital and the built environment through value; and
- » Integrating energy, resources, and uses sustainably.

# FOREWORD

by Thomas W. Toomey, Chief Executive Officer, UDR, Inc.

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One of the most commonly asked question by leaders of any company is, “What’s next?” We leaders must continually push our companies and our industry forward to remain relevant and competitive in the marketplace. It is in that spirit that I was intrigued to see ULI’s work in predicting future market trends in the real estate industry.

UDR, Inc. is proud to partner with ULI in examining the trends observed by 31 District Councils to provide insight into how each of their respective cities and regions are tackling the challenges of the future. These trends and perspectives are summarized in this report—*What’s Next at the Local Level*.

The research in this report by no means is meant to fully answer the question, “What’s next?” Nor is it designed to declare ‘winner’ or ‘loser’ cities or regions. Rather, it will help us explore challenges, examine prevailing trends, and identify opportunities to consider how we can remain relevant and competitive.

Today we witness individuals, governments, and businesses struggling with the transition from cheap money, cheap energy, easy transportation options, and a sprawling suburban landscape to embrace a new reality. Through its research and collaboration with 31 District Councils, ULI has identified a number of trends and data points that will shape individual, government, and business activities in the future. The trends and data points relate to the following issues:

**WORK:** Employment drivers and markets;

**LIVE:** Housing demand and economics;

**CONNECT:** How technology is altering people’s desire for closer proximity to work and the demand for residential, retail, and commercial space;

**RENEW:** New sources of energy and demand for greater efficiency;

**MOVE:** Increasing demand for efficient transportation and financing for improvements; and

**INVEST:** Globalization and other factors affecting the availability of capital for residential and commercial real estate markets.

*What’s Next* delves deeper than national and international trends to examine District Councils’ feedback on how these six influential issues are impacting their cities.

I would especially like to thank the District Councils who convened special meetings, responded to questionnaires, and then documented their findings to be aggregated for ULI members. Examined together, the What’s Next reports and updates provide resources to help us understand the future of our urban landscape.

We are grateful for the opportunity to work alongside ULI in presenting this important research.

# SPONSORSHIP AND SUPPORT

**The Urban Land Institute gratefully acknowledges the leadership and support of UDR, Inc.**

UDR, Inc. (NYSE:UDR), an S&P 400 company, is a leading multifamily real estate investment trust with a demonstrated performance history of delivering superior and developable returns by successfully managing, buying, selling, developing and redeveloping attractive real estate properties in targeted U.S. markets. UDR is honored to celebrate with ULI its 75th commemorative year. As a proud long-term sponsor of ULI we recognize the industry-leading research, education, and community outreach efforts of ULI and its goal of providing participants with thoughtful analysis, spirited debate, and industry best practices. UDR is grateful for the forum ULI has provided the Company to facilitate the open exchange of ideas and information as well as the sharing of experience with other local, national, and multinational industry leaders.



**THOMAS W. TOOMEY**

Chief Executive Officer

UDR, Inc.

Co-chair, Local Arrangements Committee, ULI

ULI Trustee

Governor, ULI Foundation

# PREFACE

by Maureen McAvey, ULI Senior Resident Fellow

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In the Fall of 2011, ULI launched its *What's Next? Real Estate in the New Economy* report, seeking to spur dialogue about what the future of real estate would encompass as the recession ends and a “new normal” emerges. *What's Next* looked at change in six critical areas—work, live, connect, renew, move, invest—and projected trends and future impacts. One of the great values of the report was the effort to integrate a series of profound and complex changes. From demographics to technology to capital markets, *What's Next* looked forward to the new economy and its real estate impacts.

The report and subsequent dialogues among ULI members exceeded all expectations. More than 20 ULI District Councils had programs and events that highlighted *What's Next*. Local participants discussed regional implications and consequences. Several thousand ULI members and guests engaged in conversations and presentations, ranging from all-day state-wide meetings in Florida and South Carolina to lunch meetings and panel series. While each engagement was different and reflected local and regional issues, several broad themes emerged:

- » The level of complexity and ambiguity in today's business climate is unsettling and makes strategic business planning very challenging.
- » There is broad recognition that communities need to improve educational levels to be prepared for 21st century jobs and global competition.
- » Infrastructure investment is lagging on many fronts, from existing asset repair to a need for new transportation hubs and regional links. Time lost in traffic congestion is seen as hampering local growth.
- » Local and regional leadership needs to be bold and visionary, but the political climate is very tough, and there is no consensus on how to proceed. Coalitions are forming to address specific discrete issues where business, civic, and community interests can see clear benefits and join forces to generate forward motion.

With generous support from UDR, Inc. and ULI Trustee Thomas W. Toomey, UDR's chief executive officer, ULI asked the District Councils to participate in a survey and indicate their local and regional consensus about issues discussed in *What's Next*. The District Councils' responses to the survey are contained in this report. ULI also stands ready at the national and local levels to assist leaders through another report, *Getting Ahead of Change*, the second *What's Next* publication, which premieres at the Denver ULI Fall Meeting.

# INTRODUCTION

by Heidi Sweetnam, Vice President, District Councils

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*What's Next at the Local Level* provides a look at the issues, challenges, and progress of ULI District Councils throughout North America in addressing the realities of our times.

In the spring of 2012, the Urban Land Institute asked its members to review *What's Next Real Estate in the New Economy*, and reflect on the progress their regions were making to prepare for the identified shifts in economic and demographic trends. Thirty-one ULI District Councils convened meetings of their members to discuss a 10-question survey (see pages 7–8) about new economy issues and the greatest challenges to growth and development facing their regions. This report includes summaries of those District Council discussions held across the U.S. and Canada, and provides an interesting snapshot of ULI members' perspectives on their regions' progress. Complete survey results can be found at [www.uli.org](http://www.uli.org).

A review of survey responses from the District Councils indicated several important conclusions. Broadly speaking, ULI members who participated in the survey:

- » strongly agreed with the assessment of future economic and demographic trends outlined in *What's Next*.
- » believed that their regions were making the greatest progress on initiatives to strengthen their regional connectivity to the global marketplace and to link new technology and job support.
- » acknowledged that the greatest challenges facing the regions were a lack of age-in-place opportunities, regional collaboration, and multimodal transportation.
- » identified numerous ways that ULI could help their regions move forward.

*What's Next at the Local Level* indicates the District Councils' concerns about challenges related to jobs and economic development, funding for infrastructure and transportation, zoning and planning regulations, the quality of K-12 and university education, and public and private leadership in the region. The survey summaries in this report also indicate the progress District Councils say they are making—Limited, Increasing, or Good—in key areas including global connections, jobs and technology transfer, mixed-use neighborhoods attractive to Gen Y (or Generation Y, now in their 20s to mid-30s), multimodal transportation, suburbs being redeveloped with town centers, age-in-place opportunities, and regional collaboration. The survey summaries provide numerous examples of what individual regions are doing to address challenges—information that other regions may be able to adapt to their specific circumstances.

ULI thanks ULI Trustee Thomas W. Toomey and UDR, Inc. for funding this initiative. ULI also thanks the District Council members for participating in discussions that contributed to *What's Next at the Local Level*, the District Council Chairs for Mission Advancement, and the District Council staffs for facilitating the survey process.



# SURVEY QUESTIONS

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1. *What's Next* indicates that a region's economic prospects will rise and fall in response to an ever more interdependent world economy. Does your membership agree with this premise? To what extent is your region working to invest in airports, rail or ports, or other intermodal connections which link to the global markets? What are the obstacles, if any? Please give examples.
2. *What's Next* suggests that the shift to high tech and medical business will persist. Economically successful regions will be able to recruit faculty and students interested in technology transfer and commercial development of their research. Does your membership agree with this premise? To what extent are your universities and public/private/nonprofit partners encouraging and realizing technology transfer and commercial development of research? What are the obstacles, if any? Please give examples.
3. *What's Next* predicts that well-educated young people (Gen Y) want to live and work in areas with lots of urban action and amenities. Does your membership agree with this premise? To what extent is your region incentivizing the development of mixed use, urbanized neighborhoods with parks, restaurants, nightlife, common areas, and a mix of rental and for-sale housing that will attract and retain young professionals? What are the obstacles, if any? Please give examples.
4. *What's Next* finds that cars are becoming less relevant for people under 30. Regions with multimodal transportation systems are expected to attract an increasing number of households in this age bracket. Does your membership agree with this premise? To what extent is your region investing in public transportation, multimodal transfer facilities, bike lanes and paths, etc? What are the obstacles, if any? Please give examples.
5. *What's Next* predicts growing demand by families for walkable mixed use communities in the suburbs. Apartment projects are expected to concentrate around mass transit stations and near suburban town centers, gradually turning single use commercial

strips into mixed-use corridors. Does your membership agree with this premise? To what extent are your local governments seeking innovative repurposing of commercial corridors, shopping malls and parking lots into walkable mixed-use centers? Please provide examples.

6. *What's Next* predicts that the growing population of retirees will have less interest or means to live in traditional retirement communities. Does your membership agree with this premise? To what extent are your local governments making plans to service elderly who prefer to stay in their homes or to incentivize development of senior residences in urban areas in walkable distance to fitness centers, hospitals and public transportation? What are the obstacles, if any? Please provide examples.
7. *What's Next* predicts successful regions will collaborate across jurisdictions. Does your membership agree with this premise? To what extent is your region fostering multijurisdictional cooperation on strategies to provide a regional housing policy, a regional transportation system, a regional park system and other amenities that create a competitively attractive place to live, work, and play? What are the obstacles, if any? Please provide examples.
8. Given the insights about the future outlined in *What's Next*, what are the greatest challenges to growth and development facing your region?
9. In which issue areas discussed in the survey questions above, has your region made the most progress or done exceedingly well to date?
10. Where and how can ULI at the local level have the most impact on these challenges?

# PARTICIPATING DISTRICT COUNCILS

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ULI Arizona

ULI Atlanta

ULI Austin

ULI Boston

ULI Central Florida

ULI Charlotte

ULI Cincinnati

ULI Colorado

ULI Columbus

ULI Houston

ULI Idaho

ULI Los Angeles

ULI Michigan

ULI Minnesota

ULI Nashville

ULI New Mexico

ULI New York

ULI North Florida

ULI North Texas

ULI Northwest

ULI Orange County/Inland Empire

ULI Philadelphia

ULI Sacramento

ULI San Diego/Tijuana

ULI San Francisco

ULI South Carolina

ULI St. Louis

ULI Tampa Bay

ULI Toronto

ULI Triangle

ULI Washington

# ULI ARIZONA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Technology research and innovation transfer to commercial development by Arizona State University and University of Arizona
- » Linking to global markets via airports and rail expansions

## GREATEST REGIONAL CHALLENGES

- » Generally low education level of population
- » Perception of state adversely affects recruiting of faculty and employees
- » Lack of culture
- » Ninety percent of population uses nonpublic transportation
- » Local government's lack of understanding of the need for infrastructure
- » Few incentives for change to develop mixed-use walkable centers
- » Arizona's loss of state revenues because of the Nogales border crossing to Mexico

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Rail systems in Arizona to connect to deep water ports in Mexico
- » More international flights to and from Phoenix Sky Harbor International Airport
- » People mover to connect light rail to Sky Harbor terminals

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### New Technology/Jobs Support

- » Arizona State University and University of Arizona sourcing funds for new biomedical campuses
- » Sixty percent of largest employers in future will be education and medical businesses
- » Most research money heading to Tucson
- » Banner/MD Anderson Cancer Center in Gilbert

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Growing concept for downtown Phoenix, for “active adults”
- » Targeting real estate for those earning less than \$700,000
- » Diverse population, changing preferences; some buying homes and raising families, others seeking urban transit-oriented places
- » More transition/movement among Gen Y than earlier generations
- » Rental huge market for Gen Y, who are saving money, paying debt

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### Multimodal Transportation

- » Interstate 11 to connect major ports in the West
- » Expansion of Phoenix-Mesa Gateway Airport
- » Expansion of light rail in Phoenix and Mesa

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### Suburbs Redeveloped with Town Centers

- » Not yet relevant in Phoenix, which is large and spread out
- » Investigating zoning as a form of incentive
- » Gilbert paving the way for multifamily zoning to redevelop dead stripmalls on major arterial roads

## DISTRICT COUNCIL CONTACT

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# ULI ATLANTA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Atlanta attracts businesses and talent due to diverse economy
- » Atlanta top higher-education metro area in U.S.

## GREATEST REGIONAL CHALLENGES

- » Shrinking tax base and jobs due to soft economy over past four years
- » Recent failure to pass regional referendum to fund \$8.5 billion in transportation improvements through 1 percent sales tax
- » Need for transportation reform to combat Atlanta's "car culture"
- » Scarcity of water
- » Local governments not offering incentives to build senior housing
- » Pervasive attitude of ignorance and indifference

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Collaborate with Piedmont Mega Region on water and transportation
- » Work with mayors and county leader forums and CEO roundtable
- » Train public officials through Atlanta Regional Commission and Georgia Municipal Association
- » Leverage Technical Advisory Panels (TAPs) to connect and recruit local leaders in government and business

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Hartsfield-Jackson Atlanta International Airport is world's most traveled
- » Hartsfield-Jackson offers nonstop flights to 55 countries

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### New Technology/Jobs Support

- » Atlanta ranked fifth in U.S. in spending on university research—over \$1 billion annually
- » Commercial research development led by Emory University and Georgia Tech
- » Georgia Tech's Nanotechnology Research Center
- » Partnerships between Midtown Alliance and Georgia Tech to create High Tech Center with commercial developments

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Fort McPherson redevelopment plan for science/technology park with housing
- » White Provision adaptive reuse of historic meatpacking plant for restaurants, offices, boutiques, and condos
- » Ponce City Market City redevelopment of historic City Hall East building
- » Puritan Mill redevelopment of soap factory into lofts and offices
- » King Plow redevelopment of historic industrial buildings into business and event space

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### Multimodal Transportation

- » Significant increase in walking and biking trails in past 20 years
- » Atlanta Beltline network of parks, multiuse trails, and transit developed on railroad corridors circling downtown, connecting 45 neighborhoods

## DISTRICT COUNCIL CONTACT

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# ULI AUSTIN MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Connections to global marketplace with technology sector/Samsung and higher education/University of Texas
- » University of Texas at Austin leads in recruiting faculty and students for technology transfer
- » ULI Austin and three other Texas District Councils inform members of emerging trends in real estate through local affinity groups
- » Texas District Councils meet statewide for networking and leadership

## GREATEST REGIONAL CHALLENGES

- » Lack of comprehensive transportation/transit infrastructure investments
- » Budgets favoring roads over bus/rail/bike lanes
- » Traffic congestion expected to become major frustration
- » Disconnect between city vision and land development codes/regulations
- » Venture funding/investment banking thin; better connections required to technology funding from Silicon Valley and New York

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Provide a voice of experience to public entities interested in public-private partnerships
- » Champion multijurisdictional cooperation
- » Provide leadership for transit initiatives



## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Austin-Bergstrom International Airport
- » Connections to global marketplace through Samsung and University of Texas

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### New Technology/Jobs Support

- » IC2 Technology Institute incubator at University of Texas
- » University of Texas Medical School life science research and top-tier delivery of health services in Central Texas
- » Pecan Street Project, providing 300 MW of renewable energy within city limits
- » Major office location for Google and Apple

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Second Street District infrastructure/streetscape project enhancing retail and pedestrian elements and connecting civic destinations
- » Mueller, new urban village redevelopment of Robert Mueller Municipal Airport
- » The Domain, redevelopment of former IBM site with retail, restaurants, entertainment
- » The Triangle, community redevelopment of state-owned site
- » Seaholm, future urban power plant redevelopment
- » Green, redevelopment of downtown water treatment plant

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### Multimodal Transportation

- » Car-share services popular, especially among younger/urban population

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### Regional Collaboration

- » Envision Central Texas
- » Central Texas Regional Mobility Authority (CTRMA)
- » Greater Austin Chamber of Commerce
- » Capital Area Metropolitan Planning Organization

## DISTRICT COUNCIL CONTACT

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# ULI BOSTON MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Technology innovation aided by connections between local universities, such as Massachusetts Institute of Technology (MIT) and industry
- » Maximizing the creative class through educational and cultural resources
- » High-quality K-12 schools, colleges, and universities
- » Investment in the Big Dig project connecting city to waterfront
- » Real estate investment in the inner core

## GREATEST REGIONAL CHALLENGES

- » Lack of regional collaboration due to the prevalence of town meeting and home rule governing structure; provincial attitudes
- » Massachusetts Bay Transportation Authority (MBTA) debt crisis
- » Political divides between areas with transit and without transit complicate statewide funding for multimodal transportation

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Share models of best practices from across the U.S.
- » Inform public policy
- » Encourage open dialogue and public-private partnerships

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Improvements to Boston Logan Airport, including direct flights to Asia
- » Extension of CSX rail line in Worcester
- » 4 Ports Initiative: coastal-zone management, including future harbor development for four major ports in Massachusetts
- » \$36 million grant for improvements to South Station in Boston

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### New Technology/Jobs Support

- » Educational/health-care institutions investing in commercial real estate, partnering to take research initiatives beyond campuses, i.e. Longwood Medical Area and MIT's Partnership with the Broad Institute
- » Cambridge Innovation Center
- » MIT and biotech, pharmaceutical, medical device industries (i.e. Pfizer)
- » Brigham & Women's Hospital facility for translational medicine: bench to bed

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Legacy Place in Dedham, an inner suburb of Boston with transit access
- » Boston's Seaport/Innovation District, incorporating office, entertainment, retail, "micro-unit" workforce housing apartments with shared amenities
- » New retirement community models in Boston neighborhoods such as Beacon Hill

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### Multimodal Transportation

- » The Big Dig project and connectors to other forms of transportation, such as Silver Line to Seaport District, Logan Airport, and South End
- » MBTA extending Green Line to Somerville
- » Boston Zoning Code Article 80 requiring multimodal transfer facilities for new development, i.e. Hubway bike-share station and Zipcar
- » Increase from two to 100 miles of bike lanes in Boston; 280 miles planned
- » "Uber" network from on-demand private drivers accessible by smart phone

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### Suburbs Redeveloped with Town Centers

- » Communities next to/within Route 128 beltway, such as Needham, Quincy, Wellesley, Winchester, and Waltham, have added density around town centers with transit stations

## DISTRICT COUNCIL CONTACT

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# ULI CENTRAL FLORIDA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

LIMITED

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF GREATEST PROGRESS

- » Biomedical research collaborations among university researchers, hospitals, and life-science companies
- » High-technology collaborations with U.S. Armed Forces, university researchers, and private industry
- » Increasing global connections through expanding rail services

## GREATEST REGIONAL CHALLENGES

- » Lack of state and local funding for infrastructure
- » Lack of municipal support for smart growth ideas
- » Lack of capital for real estate projects

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Continue role as a convener of public and private sectors on these issues

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » SunRail, Central Florida's first commuter rail system, with 17 Stations, including Orlando, to open beginning in 2014
- » \$1 billion three-hour Miami-to-Orlando passenger train service due to open 2014, privately financed by Florida East Coast Industries
- » CSX Intermodal Terminal in Winter Haven, new rail-based project with direct access to State Route 60

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### New Technology/Jobs Support

- » Lake Nona Medical City health-life sciences cluster for hospitals, universities, research institutions, life science companies, anchored by University of Florida, Nemours Children's Hospital, VA Medical Center
- » U.S. Armed Forces and University of Central Florida partnership through Institute for Simulation and Training at Central Florida Research Park
- » U.S. Armed Forces/Private industry: Simulation-gaming technology exchange

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Creative Village live-work infill redevelopment former Amway Arena site in downtown Orlando for education, high-tech, digital media, and creative companies

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### Multimodal Transportation

- » LYNX expansion of LYMMO downtown circulator bus in Orlando

## DISTRICT COUNCIL CONTACT

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# ULI CHARLOTTE MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Future regional growth plan through U.S. Housing and Urban Development (HUD) Sustainable Communities Grant
- » Investment in transportation
- » Infrastructure connected to global markets
- » Incentivizing vibrant mixed-use urban development

## GREATEST REGIONAL CHALLENGES

- » Charlotte largest region in U.S. without a regional plan
- » Transportation primarily by car; lack of multimodal connections
- » Mass transit system, pedestrian/bike system, and better connectivity planned, but region not able to execute fast enough for growth
- » Repurposing single-use developments into walkable mixed-use centers
- » Supporting aging in place, and incentivizing development for seniors
- » Multijurisdictional strategies for housing and transportation

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Program events at successful urban sites to promote understanding of project location, design, elements, and financing
- » Provide Technical Advisory Panels (TAPs) specifically addressing regional issues for nonprofit groups, local municipalities, small land-use challenges
- » Facilitate public-private discussions and convene conversations, especially around regionalism



## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Terminal expansion for Charlotte-Douglas International Airport
- » CSX's \$948 million freight rail investment, plus intermodal facility in Charlotte
- » Charlotte Inland Terminal strategic location at heart of Southeast manufacturing/distribution sites, and for Interstates 85 and 77 corridors

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### New Technology/Jobs Support

- » University of North Carolina, Charlotte (UNCC) Energy Production and Infrastructure Center (EPIC) global energy industry partnership
- » NorthEnd Partners nonprofit organization for green and high-tech business development in North End/North Tryon Corridor
- » North Carolina Research Campus—human health, nutrition, agriculture

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » South End EcoDistrict, filled with innovative small businesses and housing in repurposed industrial buildings
- » Uptown Charlotte—shops, restaurants, residences, parks, nightlife, arts/culture, Time Warner Arena, Bank of America Stadium, light rail

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### Multimodal Transportation

- » Gateway Station multimodal transportation center in Uptown Charlotte—request for proposals out for master developer
- » Blue Line light-rail extension to Northeast Charlotte and UNCC awaiting Federal Transit Administration federal matching funds
- » Charlotte Area Transit System expansion in Mecklenburg County
- » Charlotte B-cycle bike-share program started July 2012

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### Suburbs Redeveloped with Town Centers

- » Ballantyne Village new urban center with retail, residential communities, golf courses, hotel, corporate park
- » Birkdale Village new urban development with vertical mixed-use retail, office, hotels, and variety of housing options
- » Town of Ayrnsley 5 million-square-foot master-planned urban development with mixed-use retail, businesses, neighborhoods

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### Regional Collaboration

- » HUD Sustainable Communities Grant—tipping point for future plan
- » Carolina Thread Trail regional network in 15 counties
- » Metropolitan Transit Commission's plan for regional transportation

## DISTRICT COUNCIL CONTACT

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# ULI CINCINNATI MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

LIMITED

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Revitalization of the urban core, especially Over-the-Rhine and the Cincinnati Riverfront
- » Retaining and attracting large multinational corporations, such as Procter & Gamble
- » Maintaining first-class cultural institutions

## GREATEST REGIONAL CHALLENGES

- » Aversion to cross-jurisdictional cooperation
- » Lack of regional multimodal transportation network
- » Aging infrastructure requiring significant investment
- » Lack of strong regional identity
- » Declining commercial air service, with loss of direct and international flights

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Promote frank discussions about issues among leaders in region—three states, 14 counties, and hundreds of jurisdictions
- » Educate stakeholders about what is working in other regions
- » Share ideas on how to create priorities for the region's efforts
- » Assist leaders in planning for the region's future



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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Cincinnati is home to numerous multinational companies linked to global economy
- » Cincinnati historically a rail hub, strategically located on busy U.S. trade routes
- » Cincinnati-Northern Kentucky International Airport expanding cargo air-freight capacity
- » Ohio River's future additional barge-to-rail opportunities as Panama Canal expands

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### New Technology/Jobs Support

- » Cincinnati Children's Hospital expansion of Uptown research, care, and teaching campus

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Cincinnati's form-based code creating new walkable urban development opportunities
- » \$150 million Over-the-Rhine redevelopment through historic preservation, infill, Washington Park renovation, with partnership of city, businesses, and Cincinnati Center City Development Corporation
- » \$1 billion investment in the downtown Cincinnati Riverfront, with new housing, retail, professional sports facilities, restaurants, and entertainment venues
- » High downtown Cincinnati rents; demand for Class-A rental housing

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### Multimodal Transportation

- » New Riverfront Transit Center provides transportation hub for sports and cultural venues and planned \$236 million Fort Washington Way reconstruction
- » New streetcar circulator between Over-the-Rhine and downtown
- » City of Cincinnati's new riverfront bike center, additional bike lanes, sharrows, and exploration of bike-share system
- » Rails-to-trails conversions to bike paths along Cincinnati riverfront and in region

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### Suburbs Redeveloped with Town Centers

- » Downtown investment and increasing residential demand in suburbs, including Montgomery, Mariemont, Milford, and Hamilton

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## DISTRICT COUNCIL CONTACT

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# ULI COLORADO MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

GOOD

### Multimodal Transportation

GOOD

### Suburbs Redeveloped with Town Centers

GOOD

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

GOOD



## AREAS OF REGION'S GREATEST PROGRESS

- » \$7.8 billion FasTracks light-rail and bus rapid transit system connecting region to Denver Union Station and Denver International Airport (DIA)
- » Denver No. 1 U.S. city for attracting Gen Y via jobs, education, and outdoor lifestyle
- » Regional cooperation on jobs and economic development
- » Vibrant mixed-use downtowns in Denver, Boulder, and suburbs

## GREATEST REGIONAL CHALLENGES

- » Tax structure (Gallagher Amendment, TABOR) limiting public investments
- » Financing and political will to complete regionwide transit infrastructure
- » Investments and critical mass for transit-oriented development (TOD) beyond downtown Denver
- » Educating public on TOD and density—environmental and economic benefits
- » Limitations/risks from natural resources—geography, lack of water, wildfires

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Convening local government officials and other stakeholders
- » Guiding education regarding the value of TODs and density
- » Mobilizing balanced approach to legal and insurance issues about construction-defect liability for multifamily housing

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » DIA direct flights to Asia in 2013 (existing to Germany, United Kingdom, Iceland, Canada, Mexico, Costa Rica)
- » Airport City plan for DIA property/Aerotropolis vision
- » DIA Southwest Terminal expansion
- » FasTracks light-rail and bus service to DIA, Denver Union Station, and throughout metro region

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### New Technology/Jobs Support

- » Fitzsimons Life Science District and Anschutz Medical Campus with bioscience, biotechnology, healthcare, medical education, research
- » National Renewable Energy Laboratory and National Wind Technology Center, transferring technology to private industry
- » Municipal utility, Colorado State University, clean-energy businesses partnering for Fort Collins' net-zero energy district (FortZED)
- » University of Colorado Technology Transfer Office in Boulder
- » U.S. Patent Office locating in Denver by 2014

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Gen Y attracted to downtown transit-linked jobs, housing, and mixed-use services regionwide
- » Central Platte Valley—offices, restaurants, apartments, professional sports stadiums, and riverfront parks near Denver Union Station
- » Holiday, Uptown, East Pearl, and Steel Yards neighborhoods in Boulder

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## DISTRICT COUNCIL CONTACT

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### Multimodal Transportation

- » FasTracks light-rail and bus system with nine new lines and 60 new stations
- » Bike lanes, trails, Complete Streets in Boulder, Denver, Golden, Fort Collins, and mountain communities
- » B-cycle bike-share systems in Denver and Boulder
- » Car-share programs in Denver, Boulder, and other cities

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### Suburbs Redeveloped with Town Centers

- » Redeveloped mixed-use centers with transit, including Belmar, Englewood, Federal Center, Lakewood, Lowry, and Westminster

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### Regional Collaboration

- » Regional Transportation District, Denver Regional Council of Governments, Reconnecting America, Scientific and Cultural Facilities District

# ULI COLUMBUS MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Diverse system of urban and regional parks and greenway trails
- » Re-established vibrant neighborhoods and historic districts
- » Economic development model for region; high-value employment
- » High quality of life, with top-ranked Center of Science and Industry, zoo, parks, festivals, community involvement

## GREATEST REGIONAL CHALLENGES

- » Cars are main transportation mode; lack of public, political support for multimodal transportation plan
- » Lack of regional collaboration on comprehensive development strategy
- » Need for employment creation and diversification
- » Retention of young talent from local universities
- » Need to promote resources and amenities in central Ohio
- » No geographic boundaries

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Educate the region through programs, initiatives, and Technical Advisory Panels (TAPs)
- » Encourage multijurisdictional collaboration and cooperation
- » Push for development of a regional growth plan and a strategy for land use and transportation
- » Educate public about a regional growth plan's vision and goals

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Expansions and upgrades of air, rail, and intermodal distribution and logistics hub for Columbus' 12-county region in Central Ohio
- » Rickenbacker Global Logistics Park, international air cargo airport, rail intermodal facility, U.S. Foreign Trade Zone, distribution hub
- » Rickenbacker Parkway Expansion, a \$40 million investment by Ohio Department of Transportation
- » CSX Intermodal Terminal expansion in 2011
- » The Heartland Connector rail improvements for doublestack intermodal trains between Columbus and Cincinnati
- » Columbus International Airport Netjets Campus
- » The Columbus Crossroads Project (Interstates 670 and 71 split)

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### New Technology/Jobs Support

- » The Ohio State University's One Ohio State Framework long-term plan for partnerships with science and technology fields
- » TechColumbus support for technology collaborations
- » Wexner Medical Center at The Ohio State University
- » SciTech (Science and Technology Campus Corporation) research park at The Ohio State University
- » Ohio University Medical Campus in Dublin

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Gay Street Corridor in downtown Columbus
- » Arena District in downtown Columbus
- » River South District in downtown Columbus—The Annex, Columbus Commons, Scioto Mile, and Scioto River improvements
- » Grandview Avenue redevelopment in Grandview Heights

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### Multimodal Transportation

- » Columbus and Franklin County Metro Parks Regional Bikeway Plan
- » Central Ohio Transit Authority (COTA) bus system

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### Suburbs Redeveloped with Town Centers

- » Bridge Street Corridor, Dublin—walkable historic and cultural center
- » Lane Avenue, Upper Arlington—new hotel, apartments, offices, restaurants
- » Britten Parkway, Hilliard—planning future transportation connections

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## DISTRICT COUNCIL CONTACT

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# ULI HOUSTON MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Jobs, entrepreneurial opportunities, and regulatory climate allowing quick reaction to market changes
- » Global gateways at Port of Houston and airports
- » Investments in urban parks and bayou system
- » “Eds and meds” collaborations between universities and Texas Medical Center

## GREATEST REGIONAL CHALLENGES

- » Need for long-range development planning/master plan
- » Existing development limits multimodal corridor options
- » Lack of funding for major infrastructure; lack of single entity to coordinate regional transportation
- » NIMBYism and competition within the region; lack of strong regulatory climate to force cooperation
- » Term limits for public officials; short-term thinking

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Provide framework for regional collaboration
- » Assist in training and resources for public officials
- » Offer Technical Advisory Panel (TAP) for Metropolitan Transit Authority of Harris County (METRO) and regional governments

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » George Bush Intercontinental Airport with 70 direct/nonstop international destinations
- » William P. Hobby Airport expansion with international service
- » \$3 billion seven-year expansion of Port of Houston

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### New Technology/Jobs Support

- » Rice University's Smalley Institute for Nanoscale Science and Technology and BioScience Research Collaborative
- » BIO Houston nonprofit joining research, universities and life science companies and service providers
- » University of Houston, a Carnegie Foundation Tier One university

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Main Street Corridor revitalization planning, research project
- » Downtown Living Incentives for residential development in central business district

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### Multimodal Transportation

- » \$15 million TIGER grant for bike trails
- » Houston Bayou Greenways, \$480 million project for green space, recreation, flood prevention, and water/air improvements
- » Light-rail expansion of three lines; two more planned
- » Expansion of highways and park-and-rides

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### Suburbs Redeveloped with Town Centers

- » CITYCENTRE redevelopment of shopping mall with offices, restaurants, lofts, apartments, cinema, hotel/conference
- » Sugar Land master-planned community, retirement/assisted living
- » The Woodlands, with shopping, restaurants, urban residences, offices, hotel, entertainment, and linear park and waterway

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### Regional Collaboration

- » U.S. Housing and Urban Development Sustainable Communities Grant
- » Cypress Creek and Spring Creek greenways
- » Houston-Galveston Area Council representing 13-county region
- » Greater Houston Partnership

## DISTRICT COUNCIL CONTACT

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# ULI IDAHO MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

LIMITED

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

LIMITED

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Technology major economic driver, with Micron, Hewlett-Packard, Microsoft, and other companies
- » Good climate for entrepreneurship and innovation, with expanding base of technology start-ups and small businesses
- » Protection of natural resources, low unemployment, and high quality of life with significant population growth

## GREATEST REGIONAL CHALLENGES

- » Physical and economic isolation requires economic growth within state
- » Political, legal, and funding barriers to sustainable development and growth
- » Lack of coordination/collaboration among municipalities, counties, agencies, and special-purpose districts
- » Economic recession limiting access to capital for development

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Offer strategies to overcome barriers to good regional growth
- » Educate, communicate, and lead a shift in cultural and political thinking towards smart growth/urban development
- » Foster collaboration and action towards walkable communities, infill development, multimodal transportation



## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Port of Lewiston expansion—direct water connection to Pacific Ocean for transport of goods
- » Expansion of Boise Airport

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### New Technology/Jobs Support

- » Idaho Global Entrepreneurial Mission (IGEM) technology transfer
- » Idaho Technology Council (ITC) innovation ecosystem for information technology, agri-science, and energy
- » University of Idaho, Boise State University, College of Idaho, and Idaho State University investments in research infrastructure and partnerships

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Idaho Smart Growth/ULI—Mixed-use Activity Center Zone Pilot Project
- » Idaho Smart Growth—Ex Parte Contact Ordinance Pilot Project

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### Multimodal Transportation

- » Significant investments in bike lanes and paths
- » Treasure Valley Clean Cities Coalition for alternative fuel use
- » Community Planning Association of Southwest Idaho (COMPASS) Regional Transportation Plan for future growth

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### Suburbs Redeveloped with Town Centers

- » Harris Ranch conservation community with mixed-use urban center, parks, trails, and river and foothills access
- » Hidden Springs mixed-use village center, schools, offices, restaurants, library, recreation facilities, and community farm

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### Age-in-Place Opportunities

- » Significant increase in “retirement-friendly” homes in residential communities for region’s influx of retirees and empty-nesters

## DISTRICT COUNCIL CONTACT

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# ULI LOS ANGELES MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

LIMITED

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Investments in multimodal transportation, including public transit, bicycle, and pedestrian infrastructure
- » Incentives for mixed-use urban neighborhoods through better zoning and tax credits
- » Infrastructure to connect to global markets

## GREATEST REGIONAL CHALLENGES

- » Closing of 25 redevelopment agencies in county—negative impact on region's ability to create walkable mixed-use centers
- » No regional land-use perspective, and no leadership to create an economic development strategy to promote cooperation
- » Collaboration impaired by competition between jurisdictions and lack of public and private leadership
- » Spread of region and overall lack of multimodal transportation impacts travel for work and fun
- » NIMBYism blocks mixed-use development and transportation options

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Work with Southern California Association of Governments (SCAG) and other groups, and be proactive on issues

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Los Angeles International Airport (LAX), with flights to 58 cities in 32 countries; renovations to Tom Bradley Terminal
- » Alameda Corridor—new freight and heavy rail line connecting national rail system in Los Angeles to Los Angeles/Long Beach ports

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### New Technology/Jobs Support

- » NASA's Jet Propulsion Laboratory and California Institute of Technology (Caltech) partnership to manage lab
- » University of California, Los Angeles' MBA program collaboration with Engineering Department

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » North Hollywood—NoHo Arts District, historic suburb turning into metropolitan hub with condominium development at Metro stations
- » Santa Monica residential and retail projects along Expo Light Rail line
- » Warner Center Regional Core Comprehensive Specific Plan for eight cosmopolitan districts with pedestrian paseos and crosswalks added to superblocks and six-lane roads

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### Multimodal Transportation

- » Expanding Orange County light-rail system under construction
- » Orange Line bus system popular
- » Bike-share programs in Los Angeles, Santa Monica, Long Beach
- » Zipcar in Los Angeles

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### Suburbs Redeveloped with Town Centers

- » West Hollywood—mixed-use development replaces strip mall
- » Long Beach, with CityPlace, eight blocks of urban retail space and residences replacing Long Beach Plaza mall
- » Pasadena—Old Pasadena mixed-use redevelopment with restaurants, entertainment, shops, cafés, offices, and apartments
- » Culver City—mixed-use redevelopment of former movie/retail center with apartments and urban amenities near new light-rail station

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### Regional Collaboration

- » Measure R funding mass transit

## DISTRICT COUNCIL CONTACT

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# ULI MICHIGAN MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

LIMITED

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » International hub for automobile design and research and development
- » Increasing connections to global marketplace through international airports and private-sector initiatives
- » Business-friendly environment assisted by restructured tax code

## GREATEST REGIONAL CHALLENGES

- » Regional image and public safety issues
- » Michigan still automobile-centric culture; apprehensive about public transportation because of importance of auto industry
- » Lack of investment and regional collaboration on infrastructure and multimodal transportation
- » Disparities between struggling cities and affluent suburbs on infrastructure, education, housing, and transportation
- » State governance structure with thousands of smaller cities/townships and emphasis on home rule

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Educate decisionmakers on regional market—traditional families only 25 percent of households but main target for housing, municipal zoning
- » Sponsor research in municipal finance and land market intervention
- » Promote sustained regional cooperation and negotiation
- » Host regional roundtables on relationships, cooperation, facing challenges honestly, and political infrastructure changes needed
- » Build external visibility for ULI with diversity, new ideas, energy

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Airport City/Aerotropolis proposed between Detroit Metropolitan Wayne County Airport and Willow Run Airport
- » New International Bridge Crossing, second bridge linking Interstates 75 and 94 in Detroit to Highway 401 in Windsor, Ontario
- » Detroit Intermodal Freight Terminal, Michigan's largest public-private partnership, switching freight from trains to trucks

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### New Technology/Jobs Support

- » Tech Town, Wayne State University's tech incubator in Detroit
- » University Research Corridor Collaborative among Michigan State University, University of Michigan, and Wayne State University for invention, innovation, education, and technology transfer
- » University of Michigan acquisition of former Pfizer research campus in Ann Arbor

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Broderick Tower premiere loft-style apartments in Detroit
- » Live-work incentives for living in Detroit from Quicken Loans, Wayne State University, other employers

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### Multimodal Transportation

- » M1 Rail proposed light-rail system for Woodward Avenue in Detroit
- » Bus rapid transit system planned for Metro Detroit
- » Troy/Birmingham Transit Center hub for train, bus, and taxi along Troy/Birmingham border

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### Suburbs Redeveloped with Town Centers

- » Revitalization initiative in downtown Pontiac for major street reconfiguration, multimodal center, infill and loft conversions
- » Downtown revitalization in Pontiac: ULI Michigan and Oakland County project to daylight Clinton River

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### Regional Collaboration

- » Service sharing to save money on police and fire, i.e. Pontiac and Waterford combining fire departments
- » Woodward Avenue Action Association uniting 11 communities for economic development

## DISTRICT COUNCIL CONTACT

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# ULI MINNESOTA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

GOOD



## AREAS OF REGION'S GREATEST PROGRESS

- » Collaborations—public efforts and public-private partnerships
- » Connections to global markets with Fortune 500 headquarters

## GREATEST REGIONAL CHALLENGES

- » Coordinating political will and economic resources to take action on a cohesive strategy for economic growth
- » Political and funding obstacles to fixing state's infrastructure and transit system build-out
- » Fear of density, even in cities, and out-of-date zoning policies
- » Fewer incentives for development due to state legislature's elimination of some development tools for cities
- » Serious decline in education funding to prepare next generation of workers; widening gap between education and needed skills
- » Lack of venture capital in region to take new products and services to market

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Conducting Navigating the New Normal on redevelopment challenges
- » Provide Reality Check 2.0 for the Twin Cities, and champions to execute strategy
- » Educate—workshops, brown bag lunches, mobile tours, continuing education credits, and networking
- » Offer UrbanPlan curriculum for high school seniors



## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Minneapolis-Saint Paul International Airport, hub for Delta Airlines and flights to 21 international destinations
- » Minneapolis-Saint Paul home to 20 Fortune 500 companies, i.e. United Health Group, Target Corporation, Best Buy, and 3M
- » Greater Minneapolis-Saint Paul connecting with businesses worldwide, opened a China office

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### New Technology/Jobs Support

- » University of Minnesota one of top five U.S. academic institutions for technology transfer
- » The Entrepreneurship Accelerator, fills in entrepreneurial gaps with pre-venture economic development strategy

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Multiple urban options for young professionals in downtown core, city neighborhoods, and first and second-ring suburbs

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### Multimodal Transportation

- » One of top bicycle networks in U.S.
- » Counties Transit Improvement Board .25-cent sales tax and motor vehicle sales tax dedicated to annual capital and operating grants
- » Corridors of Opportunity initiative by consortium of public, private, and nonprofit partners for best development along transitways

## DISTRICT COUNCIL CONTACT

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### Suburbs Redeveloped with Town Centers

- » West End and Excelsior on Grand in St. Louis Park
- » Shops at Lyndale, and Lyndale and 66th Street in Richfield
- » Cedar Grove redevelopment of commercial corridor in Eagan
- » Arbor Lakes commercial and residential district in Maple Grove
- » Burnsville Heart of the City

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### Regional Collaboration

- » Minneapolis-Saint Paul Metropolitan Business collaborative plan for regional economic development
- » Metropolitan Council's Livable Communities Demonstration Account for land and public infrastructure linking housing, jobs, and services
- » Istasca Project, employer-led civic alliance including top public and private-sector leaders
- » Regional Council of Mayors and ULI Minnesota partnership

# ULI NASHVILLE MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

LIMITED

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

GOOD



## AREAS OF REGION'S GREATEST PROGRESS

- » Support for entrepreneurs and incubator businesses
- » Technology transfer and innovations impacting city building
- » Recruiting corporations and businesses
- » Productive, progressive regional cooperation and strategies

## GREATEST REGIONAL CHALLENGES

- » Limited connections to global markets, lacking major carrier hub and passenger service
- » State legislature dominated by rural interests resistant to change
- » Educating neighborhoods on benefits of mixed-use, densification, and transit corridors
- » Infrastructure projects opposed by NIMBYs
- » Promotion and partnerships of academic and corporate institutions as assets for business recruitment and community development

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Lead discussions on best practices and provide urbanism experts
- » Help local leaders and public understand issues are all connected
- » Offer Technical Advisory Panels (TAPs)
- » Assist new ULI Nashville committee linking land use, development, and design and technology



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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Nashville International Airport strategic initiative for efficient international connections
- » Truck transportation hub connecting three interstate highways
- » Nashville Mayor and Chamber of Commerce representation on Global Leadership Council

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### New Technology/Jobs Support

- » Startup Tennessee connecting entrepreneurs and startup companies
- » The Entrepreneur Center, a joint project of the Nashville Technology Council and the Nashville Chamber of Commerce
- » MedicalMart vendor showroom at Nashville Medical Trade Center
- » oneC1TY Nashville technology innovation campus for healthcare, life sciences, and health-related technology sectors
- » Chamber of Commerce policy centers, including the Technology Council, Health Care Council, and Entrepreneur Center

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » The Gulch, first LEED for Neighborhood Development in the South
- » Rolling Mill Hill adaptive-reuse urban flats and lofts

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### Multimodal Transportation

- » Transit Alliance of Middle Tennessee, and Nashville Metropolitan Transit Authority proposal for EastWest Connector bus rapid transit
- » Nashville B-Cycle bike-share program
- » Bike lanes and network of greenway parks and trails

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### Suburbs Redeveloped with Town Centers

- » Brentwood suburban densification with Bristol Building and The Crossings
- » Rezoning of West End Corridor

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### Regional Collaboration

- » Mayor's Caucus representing 10 counties in Middle Tennessee
- » Regional Transportation Authority Transit Alliance
- » Metropolitan Planning Organization collaboration with regional partners, including ULI Nashville
- » Cumberland Region Tomorrow
- » Nashville and Davidson County consolidated government

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## DISTRICT COUNCIL CONTACT

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# ULI NEW MEXICO MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

LIMITED

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

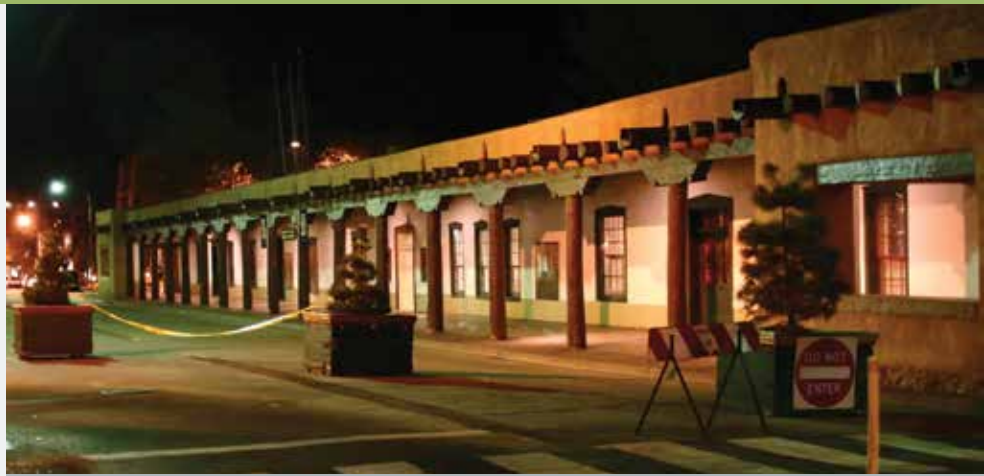
INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Developing vibrant new urban living places
- » Creating bike lanes and paths throughout region

## GREATEST REGIONAL CHALLENGES

- » New Mexico not a major destination/recipient of goods, services
- » Inadequate density to support multimodal and transit centers; public opposition, high retrofitting costs, and lack of political will
- » High level of secrecy about National Labs work; lack of significant seed capital to fund good ideas to full potential
- » Regional planning status quo due to organizational culture and lack of funding and staff for new efforts

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Continue to get word out on importance of improving region's education system
- » Invite leaders from successful cities to come speak about the "new living"
- » Reintegrate water and climate in planning discussions as part of infrastructure and trends

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » \$400 million rail facility outside Santa Teresa for commerce and goods movement due to be completed in 2014
- » Transcontinental hub with proposed major intermodal facility and interstate connections
- » Lack of money, care, and public support for global connections
- » Lack of diverse base for high-paying jobs, and “brain drain” as youth leave for school and work elsewhere

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### New Technology/Jobs Support

- » Sandia Science and Tech Park connecting high technology researchers and suppliers with the Sandia National Labs
- » LabStat, providing venture capital out of Los Alamos National Laboratory, and entrepreneur-in-residence at Sandia National Labs
- » STC.UNM at University of New Mexico’s Science and Technology Park, nonprofit for UNM research patenting/commercialization

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » El Paso with bus rapid transit and urban development
- » East Downtown (EDo) near UNM in Albuquerque, with historic high school redeveloped as lofts, with cafes, retail, hotel, transit
- » ABQ Uptown in Albuquerque—shopping, apartments, growers market

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## DISTRICT COUNCIL CONTACT

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### Multimodal Transportation

- » Bike lanes and paths regionwide; 50-mile bike loop planned around Albuquerque
- » \$5 million multimodal Montano Station in Albuquerque to connect bus, rail, auto, pedestrian, and bike modes
- » \$5 million bike/pedestrian bridge over Interstate 25
- » Bus rapid transit system in El Paso

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### Suburbs Redeveloped with Town Centers

- » Area redevelopment plans at commuter rail stations in Bernalillo, Los Lunas, and Belen
- » North Fourth Street corridor plan in Albuquerque to redevelop commercial strip with mixed-use infill transit district

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### Regional Collaboration

- » Mid Region Metropolitan Planning Organization leading land-use and transportation planning

# ULI NEW YORK MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

GOOD

### Multimodal Transportation

GOOD

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

GOOD

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Multimodal transit options and walkable streets
- » Increase in and rejuvenation of parks, waterfronts, piers, and other public spaces—High Line, Brooklyn Bridge Park, Atlantic Yards
- » Rezoning for more housing and new residential neighborhoods
- » Revitalization/repurposing of existing structures and neighborhoods

## GREATEST REGIONAL CHALLENGES

- » Deterioration of transportation infrastructure—airports, railways, bridges, canals—and high costs of rebuilding, complicated by density
- » Inconsistent connectivity between Manhattan and outer boroughs
- » High barriers to entry due to cost of living and taxes
- » Low retention of talented young people, limiting business startups
- » Rising cost and declining quality of public education
- » Regional collaboration needed for housing, cohesive park system, and governance

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Endorse Complete Streets concept to encourage efficient transportation networks and regional connectivity
- » Provide “think tank” to predict and address future issues for the region
- » Explore real estate and land use implications of issues such as hydrofracking/water use, obesity, and asthma
- » Host conferences, provide education, reach out to younger audience
- » Help ULI District Council become the “go to” resource for city government and Economic Development Corporation

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » New York City is world capital market; “local is global”
- » Metropolitan Transportation Authority investments in regional transit to Metro New York, New Jersey, and Connecticut

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### New Technology/Jobs Support

- » \$2 billion Technion-Cornell Innovation Institute and CornellNYC
- » Tech Project on Roosevelt Island for applied sciences/engineering
- » City University of New York/Memorial Sloan-Kettering Cancer Center construction of research and medical facilities on Upper East Side
- » Polytechnic Institute of New York University campus in Brooklyn
- » Brooklyn Tech Triangle, home to more than 500 technology firms

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Brooklyn Tech Triangle, including Navy Yard, with offices, cafes, retail, galleries, bus transit, and a rooftop farm
- » DUMBO in Brooklyn, a fast-growing area of converted historic buildings, artist lofts, and other housing

- » Williamsburg in Brooklyn, drawing young creative people with cafes, retail, entertainment, arts, and music
- » Long Island City, largest neighborhood in Queens, with waterfront parks, dense housing, and arts community

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### Multimodal Transportation

- » Significant increase in bike lanes and paths
- » East Side Access, connecting Long Island Rail Road tunnels in Queens to a new terminal beneath Grand Central Terminal in Manhattan
- » 7 Line Extension, a \$2 billion extension of number 7 subway line from Flushing-Main Street in Queens to Times Square in Manhattan
- » Expansion of the Long Island Railroad
- » Ride and car-share services such as Zipcar

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### Suburbs Redeveloped with Town Centers

- » Montclair in New Jersey
- » White Plains and New Rochelle in New York

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### Regional Collaboration

- » Port Authority of New York and New Jersey

## DISTRICT COUNCIL CONTACT

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# ULI NORTH FLORIDA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Logistical advantages and improving transportation infrastructure
- » Attracting companies and creating jobs

## GREATEST REGIONAL CHALLENGES

- » Master plan for downtown Jacksonville redevelopment
- » K-12 public education in Duval County
- » Funding and U.S. Army Corps of Engineers approvals for deepening JaxPort channel for international shipping
- » Infrastructure funding for transportation
- » Image of region and how it does business

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Facilitate Technical Advisory Panel (TAP) at Jacksonville International Airport regarding large excess parcel of land
- » Assist Jacksonville Mayor's office in creating downtown redevelopment plan



## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Jacksonville International Airport expansion of carriers and flights
- » CSX headquartered in Jacksonville, boosting rail/cargo transport
- » Construction of Hanjin and Mitsui/TraPac container terminals at Dames Point

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### New Technology/Jobs Support

- » University of Florida Health Science Center and Shands Jacksonville Medical Center
- » Mayo Clinic Jacksonville, employing 5,000 healthcare professionals
- » Brooks Rehabilitation Hospital in Jacksonville

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Tapestry Park mixed-use development, located within five miles of 72,000 employees
- » Riverside/Avondale/Brooklyn restored historic neighborhoods
- » San Marco neighborhood in Jacksonville, with short walkable blocks, restaurants, park, school, and services

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### Regional Collaboration

- » First Coast Reality Check, 2009 and Region First 2060 urban planning and growth collaboration among numerous regional organizations

## DISTRICT COUNCIL CONTACT

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# ULI NORTH TEXAS MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

LIMITED

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Transportation
- » Developer and market interest in urban center and transit-oriented development
- » Significant public resources committed to redeveloping declining/closed shopping malls

## GREATEST REGIONAL CHALLENGES

- » Highly fractionalized government; leaders in Dallas-Fort Worth more competitive than cooperative
- » Little public support for financing transit, as well as rail, highway, and port connections
- » Growth policies, especially economic development incentives
- » Suburban expansion continues unabated, trending to lower density
- » Dallas-Fort Worth region lacks educational infrastructure to compete globally
- » Water supply unsustainable
- » Taxation

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Provide a forum for discussing trends, conditions, best practices, policy
- » Facilitate interaction among political, civic, business, professional, and government leaders resulting in action

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Dallas/Fort Worth International Airport fourth busiest in world for aircraft movement and eighth for passenger traffic
- » Dallas-Fort Worth's exports exceeded \$25 billion in 2011; one of top 10 U.S. metro exporters

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### New Technology/Jobs Support

- » University of North Texas at Dallas
- » University of North Texas Law School
- » University of Texas-Dallas expansion

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » UpTown walkable public improvement district in Dallas with offices, apartments, and nightlife
- » Legacy in Plano—master-planned business, retail, and residential community for high-tech/telecommunications: Ericsson, Intuit
- » Southlake
- » Vision North Texas establishing criteria for mixed-use centers

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### Multimodal Transportation

- » Dallas Area Rapid Transit (DART) rail and bus services
- » Bike lanes and trails popular
- » Cotton Belt Innovative Financing Initiative to fund 62-mile rail corridor from southwest Fort Worth to Plano and Richardson
- » Texas Local Option Transportation Act

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### Suburbs Redeveloped with Town Centers

- » Dallas Midtown—planned Valley View mall redevelopment with hotel, condominiums, apartments, offices, retail, and services
- » Addison Circle in Addison—development of urban town center with transit facilities, civic uses, offices, cafes, shops, and parks
- » Redevelopment of Sakowitz/Village on the Parkway mall in Addison

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### Regional Collaboration

- » Dallas Area Rapid Transit rail and bus system
- » Six City Trail System
- » North Texas Tollway Authority

## DISTRICT COUNCIL CONTACT

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# ULI NORTHWEST MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

GOOD

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

GOOD



## AREAS OF REGION'S GREATEST PROGRESS

- » Good geography/location and access to Asian markets
- » World-class healthcare institutions
- » Global businesses, including Boeing, Amazon, Microsoft, Nintendo, Starbucks, Nordstrom
- » Young people drawn to region for jobs and lifestyle

## GREATEST REGIONAL CHALLENGES

- » Political and institutional conflict among local and state jurisdictions and geographic areas within region, i.e. ports of Tacoma and Seattle
- » Taxing authorities fragmented and limited; local jurisdictions compete for tax revenues
- » Resistance to density, even adjacent to transit
- » Lack of tax increment financing to spur public/private development
- » Education underfunded and needs improvement at every level

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Offer ideas on public policies to encourage higher density
- » Assist in moving tax increment financing forward regionally
- » Develop Technical Advisory Panels (TAPs) on regional issues
- » Create culture of regionalism and regional identity
- » Help transition Reality Check Seattle, 2008 vision to reality

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Seattle-Tacoma International Airport expansion with third runway
- » Anchor companies like Boeing and Amazon have global perspective

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### New Technology/Jobs Support

- » University of Washington (UW)/Fred Hutchinson Cancer Research Center
- » Bothell biomedical device cluster
- » UW Medicine's expanded biotechnology and medical research
- » Microsoft, Amazon, Adobe, Getty Images, and other high-tech jobs
- » Redmond gaming cluster, led by Nintendo and Microsoft
- » Bill and Melinda Gates Foundation global health initiative

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Ballard Historic District—entertainment, amenities, multifamily housing options, good schools
- » Capitol Hill—eclectic mix historic/new apartments, retail, warehouse districts, micro-office/co-working spaces for creative industries
- » Fremont “Center of the Universe”—24/7 lifestyle with bars, clubs, and restaurants in one of Seattle's hottest urban center areas

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### Multimodal Transportation

- » \$4.65 billion SR 520 Bridge Replacement/ HOV Program bridge, bike lane/trail, roadway improvements on Seattle to Redmond corridor
- » “Bike culture” popular, with repair stations, showers in demand
- » Sound Transit light rail developing in Seattle-Tacoma region

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### Suburbs Redeveloped with Town Centers

- » Bellevue—suburban mall center now with Microsoft campus, high-rise housing, retail, entertainment, future light rail service
- » Redmond—historic downtown, golf course now retail-jobs-housing hub
- » Puyallup—historic downtown with TOD urban housing, farmers market, park, and new civic center near commuter rail station
- » Renton—TOD with significant housing and retail
- » Mill Creek Town Center—walkable retail, higher-density housing

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### Regional Collaboration

- » Transportation system
- » Puget Sound Regional Council's “Growing Transit Communities” for sustainable transit investments integrated with land-use policy
- » Prosperity Partnership regional economic development initiative

## DISTRICT COUNCIL CONTACT

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# ULI ORANGE COUNTY/INLAND EMPIRE MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

LIMITED

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Inviting climate for businesses
- » Good jobs/housing balance

## GREATEST REGIONAL CHALLENGES

- » California budget crisis trickling down, city/county loss of funds
- » Greenfield development, sprawl, single-family housing are standard
- » Demise of redevelopment authorities destroyed public sector tool for incentivizing mixed-use development; new tools needed
- » Geographic size and lack of density hamper transit investments
- » Road infrastructure inadequate, and dwindling state funding directed to roads; alternative transportation low priority
- » Transit such as Metrolink detached from downtown and airport
- » Multiple municipalities, parochialism, NIMBYism, and absence of regional cooperation block bigger-picture thinking and planning

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Offer workshops that promote transit-oriented development, walkable communities, connectivity, and community repair
- » Provide comprehensive land-use transportation integration advice
- » Be more proactive; publicize organization, promote free services for municipalities from Young Leaders, host design competitions for cities



## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » LA/Ontario International Airport's \$270 million project—two new terminals, ground transportation center, airfield improvements
- » Extension of 210 Freeway

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### New Technology/Jobs Support

- » University Research Park, next to University of California, Irvine—business center for 60 companies (Intel Corp., Cisco Systems) and 3,000 employees in biotechnology, engineering, and computer science
- » University of California, Riverside Center for Nanoscale Science and Engineering
- » Anaheim Center for New Technologies (AC-NET)
- » Loma Linda University and Medical Center

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### Multimodal Transportation

- » Western Riverside Council of Governments (WRCOG)'s Transportation Uniform Mitigation Fee Program—\$4 billion for road, bridge, and transit

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### Regional Collaboration

- » Placemaking Initiative Council working on Orange County Metropolitan Plan for future of transportation/commercial development with residential and recreation in city center
- » Multiple agencies, including Riverside County Transportation Commission, Southern California Regional Rail Authority, San Bernardino Association of Governments, March Joint Powers Commission, Western Riverside Council of Governments

## DISTRICT COUNCIL CONTACT

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# ULI PHILADELPHIA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Promoting Center City/Center City District/University City District
- » Promoting urban living in Philadelphia neighborhoods such as Fairmount, Fishtown, and Northern Liberties
- » Zoning code reform
- » Hospitals and universities pursuing infrastructure development
- » Cultural resources in Philadelphia's central business district

## GREATEST REGIONAL CHALLENGES

- » Government fiscal problems/lack of funding
- » Infrastructure needs, but lack of funding
- » Lack of regional cooperation
- » Need for jobs and employment
- » Deep-seated resistance to change

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Take a longer-term outlook of 10-15 years
- » Present a different vision of future and development within that vision
- » Raise awareness of importance of regional challenges; educate public
- » Take leadership in advocating for educated electorate
- » Encourage collaboration and competitiveness as a region
- » Partner with relevant organizations

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Expansion of Philadelphia International Airport—\$1 billion in capital improvements since January 2000, with two new terminals
- » Planned expansion of Southport, Philadelphia's seaport, with container terminal on the Delaware River
- » Delaware River dredging of main shipping channel for Port of Philadelphia, Delaware, and southern New Jersey
- » High-speed rail and rail distribution key to region
- » Interstate 95 improvements
- » Lehigh Valley industrial center intermodal connections

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### New Technology/Jobs Support

- » University City Science Center in Philadelphia, supporting technology commercialization with 31 colleges, universities, hospitals, and research institutions in three-state region
- » Large concentration of pharmaceutical companies and medical campuses, including GlaxoSmithKline, Endo Pharmaceuticals
- » Rutgers University and Rowan University in New Jersey

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Sisters City Park in Philadelphia
- » Center City District in Philadelphia
- » Schuylkill River Park master plan with improved access to river
- » Delaware Waterfront master plan

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### Multimodal Transportation

- » City of Philadelphia plans for Complete Streets, bike lanes, and bike-share

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### Suburbs Redeveloped with Town Centers

- » Voorhees Town Center, mixed-use redevelopment of Echelon Mall in New Jersey, with retail, restaurants, offices, and housing
- » Abington Township transit-oriented development plan for Noble Train Station in town center, with State Department of Transportation and Southeastern Pennsylvania Transportation Authority (SEPTA) funding

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### Regional Collaboration

- » SEPTA and regional transportation planning

## DISTRICT COUNCIL CONTACT

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# ULI SACRAMENTO MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

INCREASING

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

GOOD

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

GOOD



## AREAS OF REGION'S GREATEST PROGRESS

- » Crocker Art Museum—\$150 million expansion
- » Expansion of light rail in a down economy, plus additional service
- » Resurgence of Midtown and East Sacramento as desirable places
- » Next Economy initiative taking a proactive “setting the stage” approach
- » Sacramento Area Council of Governments (SACOG) metropolitan transportation plan
- » Growth of medical/healthcare industry
- » High quality of life, with great recreation opportunities

## GREATEST REGIONAL CHALLENGES

- » Loss of 110,000 jobs since 2007
- » Determining how to diversify economy away from government, and how to support small businesses and innovation
- » Linking jobs to education—K-12 and university
- » Need for workforce training and talent retention strategies

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Create marketing campaign about ULI's efforts
- » Serve as thought leaders, trusted/able to bring diverse groups to table
- » Educate on the integration of human capital and place—education, jobs, and wealth intertwined with where people want to live
- » Continue to push communities to prepare for market return

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Port of Sacramento (West Sacramento and Stockton) expansion
- » Sacramento International Airport's \$1.1 billion expansion
- » Multimodal regional transportation planning for \$30 billion investment in six counties
- » State system for high-speed rail with Sacramento at the north end

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### New Technology/Jobs Support

- » University of California (UC), Davis biotech research—\$657 million annually
- » Agriculture biotech industry beginning to work with UC Davis
- » Medical clusters—UC Davis Medical Center/ Kaiser Permanente, and Mercy General Hospital/ Sutter Health—big economic impact/growth
- » Sacramento Center for Innovation (SCI), next to California State University and light rail, will be defined in specific plan in 2013

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Midtown Sacramento, center of the art, music, and culture scenes, with boutiques, bars, clubs, cafes, winery, historic residential area
- » “Park” neighborhoods, i.e. Oak Park next to UC Davis Medical Center
- » Sacramento's Artisanal Marketplace popular for eating, and alley spaces for innovative projects
- » Folsom—historic downtown and residential areas with employers including Mercy Hospital, Kaiser Permanente, Intel, Verizon

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### Multimodal Transportation

- » Transit Renewal, Sacramento Regional Transit program for light rail and rapid-transit bus improvements
- » “Bike culture” with increasing bike lanes, trails, connections
- » Zipcar car-share service

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### Regional Collaboration

- » SACOG's Sacramento Region Blueprint collaboration among 28 local governments and organizations/agencies in six counties to create smart-growth vision through 2050
- » Next Economy regional global-economy initiative among public officials, community/workforce leaders, educational institutions, and private sector

## DISTRICT COUNCIL CONTACT

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# ULI SAN DIEGO/TIJUANA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

GOOD

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Expansion of scientific community by University of California (UC), San Diego, diversifying economy from primarily military, tourism, international trade, and manufacturing
- » Emerging biotech/high-tech companies; strong projected job growth
- » 10 percent of all publicly traded biotech firms based in region
- » Planning and zoning—general and community plans, and mixed-use flexibility within zoning codes
- » Relatively young and well-educated population

## GREATEST REGIONAL CHALLENGES

- » Groups dedicated to status quo, such as Save Our Heritage Organization (SOHO) and community planning groups
- » With death of redevelopment, huge financing challenges for backbone infrastructure and services associated with new urban growth
- » Lack of financing and priority for nonvehicle transportation; inner city connected, but not suburbs
- » Transit-oriented development not likely future development pattern—transit riders generally low-income with affordable housing needs

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Educate elected officials on benefits of planning for next century
- » Promote ULI as group that represents urban ideals and educates and supports smart-growth initiatives and developments



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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Nonstop flights to London, Canada, and Mexico
- » Port of San Diego a strategic commercial seaport

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### New Technology/Jobs Support

- » UC San Diego one of top U.S. technology-transfer universities
- » Expansion of UC San Diego's biotech and medical collaborations, such as planned \$110 million Center for Innovative Therapeutics with Moores Cancer Center and Health Sciences campus
- » Initiatives by pharmaceutical companies, i.e. start-up center by Johnson & Johnson, and Eli Lilly biotech center
- » CleanTech clean technology (wind, solar) initiative by City of San Diego to promote innovations and collaborations with businesses

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Older, walkable neighborhoods attract many Gen Y

## DISTRICT COUNCIL CONTACT

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# ULI SAN FRANCISCO MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

GOOD

### Multimodal Transportation

GOOD

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Strengths in software, education, Silicon Valley, venture capital, and ability to influence rest of world
- » San Francisco Bay Area well-positioned physically and geographically, with major port, international airport, and direct link to China
- » Focus on improving transportation and other regional solutions to combat climate change

## GREATEST REGIONAL CHALLENGES

- » Retaining talent due to high cost of living and complicated regulations
- » Effect on region's competitiveness of rising cost of public education, especially at universities
- » Closing of redevelopment agencies to deal with state budget deficit
- » Lack of affordable housing and poor public schools pushing families out of City of San Francisco
- » Impact of lowering parking ratios on housing unit mix; smaller units with fewer cars favored, excluding growing families
- » Region still relies heavily on automobiles, San Francisco included

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Examine new opportunities and tools to address how to redevelop without state support in California

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » New business-to-business connections with Asia through organizations such as SF-China, Asia Society, China Society, Bay Area Council
- » Flights to dozens of international destinations in Asia, Europe, Australia, and the Americas
- » Ports of San Francisco and Oakland with miles of waterfront property, commercial real estate, and maritime piers

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### New Technology/Jobs Support

- » Partnerships among Stanford University, entrepreneurs, venture capitalists in Silicon Valley sparking technology transfer/funding start-ups
- » University of California, San Francisco (UCSF) medical campus and biotechnology industry collaboration on technology transfer
- » Innovations in Clean Tech attracting venture capital investment

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Rincon Hill—first redeveloped neighborhood for residential mixed-use next to downtown, including open space, retail, services
- » Mission Bay mix of affordable/market rate housing, university research and medical facilities (UCSF), commercial office, and open space
- » Mid-Market San Francisco—influx of companies such as Twitter and Yammer; housing boom with retail, restaurants, and arts organizations

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### Multimodal Transportation

- » Bay Area Rapid Transit (BART) subway/commuter rail, light rail, Caltrain, Amtrak, bus systems link region
- » 1:1 minimum demand for bike parking in new developments
- » Car-share through Zipcar and City CarShare

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### Suburbs Redeveloped with Town Centers

- » Downtowns in Redwood City, Walnut Creek, and Mountain View being redeveloped and densified to create walkable neighborhoods

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### Regional Collaboration

- » Association of Bay Area Governments and Metropolitan Transportation Commission's Sustainable Communities Strategy
- » Senate Bill 375 (2008) drives regional collaboration on climate change and regional transportation
- » Bay Area Council formed California Environmental Quality Act Committee to propose changes to California's complex statute

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## DISTRICT COUNCIL CONTACT

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# ULI SOUTH CAROLINA MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Technology transfer and commercial development of research
- » Commercial market on the map with new companies

## GREATEST REGIONAL CHALLENGES

- » Lack of vision, awareness/understanding of changing demographics, and desire for any economic development
- » "Silo" thinking and competition between businesses and jurisdictions, rather than cooperation
- » High cost of housing relative to comparable regions; lack of a regional housing plan
- » Funding deficits, regulations, NIMBYism about rezoning, infrastructure, and alternative transportation needs
- » Codes, zoning, and planning bureaucracy increasing with fees and taxes

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Reach out and educate public officials, business/community leaders, and public about smart growth, urbanism, transit
- » Provide leadership to combine universities, governments, businesses into one group collaborating for common good
- » Help create a state master plan and lead implementation
- » Translate efforts like Reality Check into measurable, visible successes

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Manufacturing for domestic and foreign businesses—automotive, aerospace industries: BMW, Boeing, Michelin, and Bridgestone
- » Port of Charleston new terminal to expand capacity by 50 percent, to accommodate expansion of Panama Canal

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### New Technology/Jobs Support

- » Innovista research campus at University of South Carolina—integrating public and private-sector research in high-tech, biotechnology, nanotechnology, environmental sciences
- » Horizon District, a 24/7 mixed-use live-work biotechnology research and development area, supported by City of Charleston, Medical University of South Carolina, and South Carolina Research Authority
- » INAVISTA \$5 million investment in research and development on site of nylon fiber manufacturing facility in Camden

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » North Charleston sustainable development, retail, business development, Coliseum/Convention Center
- » City of Mount Pleasant—new businesses and multifamily housing, i.e. Woodfield Long Point, 280-unit apartment complex

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### Multimodal Transportation

- » Swamp Rabbit Trail—connecting Furman University to downtown Greenville via 17.5 mile walk-bike trail

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### Regional Collaboration

- » Planning third Reality Check
- » Inland Port in Greer—rail facility and terminal planned for international container movement between Port of Charleston and neighboring states

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## DISTRICT COUNCIL CONTACT

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# ULI ST. LOUIS MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

GOOD

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Attractive quality of life, with universities and cultural amenities such as symphony, theaters, museums, zoo, and science center
- » Support for research parks and medical, high-tech, and business start-ups and incubators
- » Growth in medical/healthcare field and globally connected agriculture and science companies

## GREATEST REGIONAL CHALLENGES

- » Need several hundred million dollars to link transportation and ports; infrastructure pieces there, but linkages not yet in place
- » Fallout from remoteness, compared to coasts; takes longer to get here
- » Lack of funding for rail/commuter lines; infrastructure makes car-less lifestyle difficult, hampers attraction of businesses/young professionals
- » Need for additional job opportunities for talented young people educated at many higher education institutions in region
- » Insularity, parochialism, and lack of awareness/concern about global issues among constituents

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Be the voice to the community to showcase successes, establish vision, and educate region about its potential
- » Provide opportunities for development community to collaborate with public sector
- » Communicate the importance of a regional planning approach
- » Focus/conduct research on modest-cost Midwestern cities; focus less on high-cost gateway cities and states



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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » \$19 million ports project in 2013 to redevelop municipal docks, allowing water traffic to take on more cargo
- » China Hub—city pursuing agreement with China to draw more air traffic and create international cargo hub

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### New Technology/Jobs Support

- » U.S. Department of Commerce Economic Development Administration study on North Riverfront Business Corridor to draw new business opportunities and jobs
- » Barnes-Jewish Hospital and Washington University collaborations
- » Plant/life science centers at Danforth, CORTEX, and Monsanto

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Near South Side—walkable, diverse, architecturally interesting, with housing options on walkable scale in Lafayette Square, Soulard, Tower Grove, and the Hill neighborhoods
- » Downtown St. Louis MX District—TOD with a hotel, apartments, restaurants, emerging retail, and movie theater
- » University City, an inner-ring suburb with housing options and The Loop retail district, to be connected by loop trolley

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### Multimodal Transportation

- » Bus and light-rail systems, with possibility of high speed rail to other Midwest cities

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### Suburbs Redeveloped with Town Centers

- » Clayton, thriving inner-ring suburb with walkability and great schools
- » Kirkwood inner-ring suburb with locally owned shops, restaurants; on central corridor, surrounded by diverse housing on walkable scale
- » Webster Groves, inner-ring suburb with central commercial corridor and mature neighborhoods with diverse housing styles and values

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### Regional Collaboration

- » Metropolitan Sewer District collaboration for critical infrastructure and utility services
- » Zoo-Museum District formed as taxing district for cultural institutions
- » Great Rivers Greenway District, developing regional trail, park, greenway system to improve quality of environment, community life, economic vitality

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## DISTRICT COUNCIL CONTACT

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# ULI TAMPA BAY MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

LIMITED

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

LIMITED



## AREAS OF REGION'S GREATEST PROGRESS

- » Livable city with good support for technology-jobs transfer
- » Home to fast-growing start-ups such as Tampa's myMatrixx and Haneke Design, and St. Petersburg's Catalina Marketing

## GREATEST REGIONAL CHALLENGES

- » Need for a regional metropolitan planning organization; too many diverse viewpoints and little collaborative leadership
- » Progress on intermodal connections stunted from lack of funding and movement on a regional plan
- » Regional "silos" inhibit connecting across Tampa Bay
- » Regulations and NIMBYism prevent transit-oriented development
- » Lack of university and school funding statewide

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Interstate 4 Selmon Expressway Connector, new connecting highway system from Port of Tampa
- » Port of Tampa preparing for increased capacity/activity due to widening of Panama Canal
- » \$28 million planned expansion of Tampa International Airport to accommodate more flights to Europe, Cuba, and Caribbean

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### New Technology/Jobs Support

- » Tampa's Center for Advanced Medical Learning and Simulation
- » USF (University of Southern Florida) Connect network—researchers, innovation companies, businesses, and government
- » Tampa Bay Innovation Center launch pad for inventors, entrepreneurs, and early-stage companies developing innovative technology
- » Innovation Alliance—USF, Florida Hospital, Busch Gardens, Moffitt Cancer Center
- » Creative Tampa Bay and Emerge Tampa (business leadership group for Gen Y) working to draw young talented workers

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Encore! Downtown's Tempo District, 40+ acre redevelopment project connecting neighborhoods surrounding downtown Tampa
- » InVision Tampa master plan for City Center Tampa

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### Multimodal Transportation

- » St. Petersburg focused on pedestrian safety, fewer parking lots
- » Tampa Bay Area Regional Transportation Authority (TBARTA)'s 2009 long-range transportation master plan for seven counties
- » Mass transit plan such as rail connections to link cities and regions within Florida under development
- » Pinellas trails, 34 mile trail with 90,000 visitors per month

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### Suburbs Redeveloped with Town Centers

- » Pinellas US 19 Corridor improvements
- » Riverwalk and Tampa Heights redevelopment
- » Westshore Master Plan

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### Regional Collaboration

- » Tampa Bay Partnership regional business plan
- » TBARTA's transportation master plan

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## DISTRICT COUNCIL CONTACT

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# ULI TORONTO MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

GOOD

### Suburbs Redeveloped with Town Centers

GOOD

### Age-in-Place Opportunities

INCREASING

### Regional Collaboration

GOOD



## AREAS OF REGION'S GREATEST PROGRESS

- » Toronto's hot development climate—100,000 residential units and 45 million square feet nonresidential space proposed 2006–2010
- » Urbanizing downtown, Main Street corridors, and suburban areas around transit, housing, mixed uses via planning/zoning changes
- » Metrolinx's Big Move major regional transportation vision
- » Robust job, wages, and gross domestic product growth rate
- » Downtown Toronto center for research, university, medical, commercial collaborations

## GREATEST REGIONAL CHALLENGES

- » Sprawl vs. intensification—only in appropriate areas
- » Increased gridlock
- » Lack of capital funding for new infrastructure
- » Lack of funding for the Big Move/other transportation efforts
- » High demand for affordable housing, rental and owned; existing stock outdated
- » Building complete communities

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Develop position papers on topics for various government levels
- » Appear before municipal councils and government agencies on regional issues
- » Draw on established ULI research and education and apply locally

## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » Greater Toronto Airport Authority \$5 billion investment in Pearson International Airport redevelopment, Canada's busiest hub
- » CN (Canadian National) Rail upgrade investments
- » Metrolinx express rail service from Pearson International Airport to Union Station in downtown Toronto

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### New Technology/Jobs Support

- » Toronto's MaRS Centre—gateway to Canada's largest concentration of scientific research, with hospitals, universities, research institutions
- » University of Toronto at Mississauga tech transfer, commercialization
- » Ryerson University's Digital Media Zone (DMZ) space to help students develop digitally inspired concepts and marketable products/services
- » RIC Centre, Peel Region's hub for innovation and entrepreneurship, with advisory, training, networking services for businesses

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » "Kings"—King-Parliament and King-Spadina—former industrial areas redeveloped into vibrant walkable downtown neighborhoods, with housing, shops, cafes, offices, live-work, and light industrial

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### Multimodal Transportation

- » Metrolinx's Big Move strategy of connected higher-density mobility hubs at key intersections in Regional Rapid Transit network
- » Metrolinx's \$6.4 billion investment in three major light-rail initiatives
- » Union Station expansion with greater rail and transit passenger capacity
- » Bike-share programs such as Bixi and car-share programs such as Autoshare and Zipcar included in downtown development projects
- » Downtown condos built with reduced or no parking spaces

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### Suburbs Redeveloped with Town Centers

- » Intensified development, residential/office space added to shopping malls in downtown Markham and North York, Sherway Gardens, Scarborough Town Centre, Toronto "Centres" i.e. Eglinton
- » Mississauga City Centre, formerly Square One shopping center, with high-rise residences, commercial space, and Performing Arts Centre

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### Regional Collaboration

- » Province's Growth Plan for Greater Golden Horseshoe—1.8 million-acre green belt and policies on urban boundaries, mixed-use transit-friendly downtowns, infill, minimum suburban density, municipal legislation

## DISTRICT COUNCIL CONTACT

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# ULI TRIANGLE MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

INCREASING

### New Technology/Jobs Support

GOOD

### Mixed-Use Neighborhoods Attractive to Gen Y

INCREASING

### Multimodal Transportation

LIMITED

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Transfer of research and technology through universities, research institutes, and commercial businesses
- » Urban centers experiencing dramatic turnarounds
- » Large expansion of bike infrastructure/lanes and paths
- » Modernizing development codes to allow for mixed uses
- » Improvement in K-12 school systems

## GREATEST REGIONAL CHALLENGES

- » Geography, and growth pattern lacking grid of roads
- » Car is major transportation mode; public transit limited
- » Lack of political will/leadership regarding transportation challenges
- » NIMBYism about traffic, density, noise associated with mixed-use development and urbanism
- » "We versus me" attitude

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Take more prominent role in transit dialogue through programs
- » Educate public/elected officials about where mixed-use development and density work
- » Convene conversations and educate county and municipal officials
- » Enable and elevate the discussion, rather than having an agenda
- » Foster young leaders



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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » New Terminal 2 at Raleigh-Durham International Airport
- » High-speed rail to Washington, D.C. and Charlotte starting
- » \$21 million TIGER grant for new multimodal downtown Raleigh Union Station, with Amtrak linking to Southeast High Speed Rail Project (SEHSR) and future commuter rail
- » Planning underway for SEHSR to Washington, D.C.

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### New Technology/Jobs Support

- » Research Triangle Park—international economic development model for leveraging universities for technology and research and development; Master Plan underway for new uses
- » Triangle companies such as CREE, Red Hat, and SAS spin-offs from university research
- » North Carolina State University's Centennial Campus incubator space for new technology companies (Red Hat birthplace)

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » American Tobacco Campus in Raleigh—reuse of historic tobacco factories—restaurants, retail, offices, residences, YMCA, biking trails; near Durham Bulls baseball park, performing arts center
- » LEED-certified Golden Belt in Durham—reuse of hosiery mill, with lofts, live-work, restaurants, artist studios/galleries, public plazas, and affordable rehabbed and infill housing

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### Multimodal Transportation

- » Regional greenway system
- » Raleigh's Bicycle Transportation Plan and bikes lanes/infrastructure
- » Triangle Transit's Bus on Shoulder Systems (BOSS) for rush hour

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### Suburbs Redeveloped with Town Centers

- » North Hills retrofit of struggling shopping mall into mixed-use center with apartments, retail, and commercial in horizontal development
- » Dense multifamily development around shopping centers, i.e. Raleigh's Cameron Village, proposed around Crabtree Valley Mall

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### Regional Collaboration

- » Regional transportation system efforts underway
- » Progress toward regional park system, including urban park, local trails, and greenways connecting to regional trail network

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## DISTRICT COUNCIL CONTACT

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# ULI WASHINGTON MEMBER PERSPECTIVES

Summary of District Council Survey Results

## What kind of progress is your region making in the following areas?

### Global Connections

GOOD

### New Technology/Jobs Support

LIMITED

### Mixed-Use Neighborhoods Attractive to Gen Y

GOOD

### Multimodal Transportation

INCREASING

### Suburbs Redeveloped with Town Centers

INCREASING

### Age-in-Place Opportunities

LIMITED

### Regional Collaboration

INCREASING



## AREAS OF REGION'S GREATEST PROGRESS

- » Washington, D.C. positive economic climate, capitalizing on international and entrepreneurial jobs, away from dependence on Federal government
- » Rapid redevelopment of sustainable neighborhoods in the region's core, the District of Columbia

## GREATEST REGIONAL CHALLENGES

- » Fractured regional approach complicated by jurisdictions in two states and District
- » Land use and economic development most contentious regional issues; jurisdictions compete, rather than collaborate for regional strength
- » Lack of funding to rebuild aging infrastructure
- » Disparities in distribution of jobs and affordable housing, requiring massive commuting across region
- » No leadership forum or mechanism to coordinate/distribute resources
- » Need for accessible, reliable, connected multimodal transportation system

## OPPORTUNITIES FOR ULI LEADERSHIP

- » Continue programs about regional challenges and solutions
- » Advocate/educate about best practices in sustainable growth
- » Cultivate visibility as expert, fact checker, and truth purveyor
- » Counter misinformation about growth issues and challenges and opportunities

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## EXAMPLES OF PROGRESS TOWARDS WHAT'S NEXT

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### Global Connections

- » U.S. Capitol, where 177 countries maintain diplomatic missions
- » Dulles International Airport's flights to 49 global destinations
- » Amtrak rail and Metro rail connecting to nation and metro region

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### New Technology/Jobs Support

- » ULI Washington's Strategic Plan for public-private dialogue with nontraditional land-use partners, such as medical and educational institutions, to provide anchors for economic development

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### Mixed-Use Neighborhoods Attractive to Gen Y

- » Numerous walkable, transit-linked downtown D.C. neighborhoods—Adams Morgan, Capitol Hill, Chinatown, Dupont Circle, Foggy Bottom
- » Silver Spring in Maryland, with urban feel, apartments, shopping, American Film Institute Theater and cultural center, multimodal transit
- » Old Town Alexandria in Virginia, historic district on Potomac River, with apartments, townhomes, restaurants, transit links

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### Multimodal Transportation

- » Washington Metropolitan Area Transit Authority's Metrorail and Metrobus serve 3.4 million within 1,500-square miles
- » Bike-share program in the District, Arlington County, and planned for Montgomery County

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### Suburbs Redeveloped with Town Centers

- » Tysons Corner, Virginia—shopping district/strip mall redevelopment with offices, apartments, public space, near Metro rail system
- » Bethesda Row, suburban Bethesda downtown turned into walkable shopping, restaurant, and apartment district near Metro
- » White Flint in North Bethesda, Maryland—compact urban infill of offices, shops, pedestrian plaza replacing strip mall and parking lots
- » Merrifield and Rockville Town Center in Montgomery County—mixed-use developments next to major rail stations

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### Regional Collaboration

- » Metro District's expansion of regional transportation infrastructure
- » Enhanced cooperation since 9/11 in fire and emergency services and communication/response regarding threat to region
- » ULI Washington's Regional Land Use Leadership Institute, providing networking and education for emerging regional leaders

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