Technical Assistance Program (TAP) Panel

Advisory Services to provide the City of Morrow with a development strategy for the Southlake Parkway potential redevelopment area

City of Morrow, Georgia

October 2011

Urban Land Institute

Atlanta
Technical Assistance Panels

About ULI Atlanta

A District Council of the Urban Land Institute

With over 1,000 members throughout the Metropolitan Atlanta area, ULI Atlanta is one of the largest District Councils of the Urban Land Institute (ULI). We bring together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs. We share knowledge through education, applied research, publishing, and electronic media.

ULI Mission: 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.

About the Technical Assistance Panels (TAPs)

Since 1947, the Urban Land Institute has harnessed the technical expertise of its members to help communities solve difficult land use, development, and redevelopment challenges. ULI Atlanta brought this same model of technical assistance to the Metropolitan Atlanta area. Local ULI members volunteer their time to serve on panels. In return, they are provided with a unique opportunity to share their skills and experience to improve their community.

Through Technical Assistance Panels (TAPs), ULI Atlanta is able to enhance community leadership, clarify community needs and assets, and advance land use policies that expand economic opportunity and maximize market potential.

ULI Atlanta
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ACKNOWLEDGEMENTS

ULI Atlanta would like to thank the City of Morrow for their sponsorship of the technical assistance panel.

The Panel is also grateful to have the benefit of input from the City officials who attended the session.

The panel would also like to thank the Morrow Conference Center for their hospitality.

Panel and Project Staff

ULI Atlanta would like to thank the panelists, moderators and TAP Committee members for their time, energy and passion for ULI.

PANEL MEMBERS:

Heather Alhadeff – *Perkins + Will*
Thurston Cooke – *Norsouth*
Shannon Kettering – *POND/ Ecos*
Kenneth Neighbors – *Greenberg Traurig*
Marc Pollack – *Pollack Shores Real Estate Group*
Diana Wheeler – *City of Alpharetta*
Yvonne Williams –*Perimeter CID*

MODERATOR:

Kirby Glaze – *Public Private Partnership Project Management, Inc.*

WRITER:

Sarah Kirsch

ULI Atlanta Staff and support

Barbra Bowers – *ULI Atlanta, Senior Associate*

Panelists from Left to Right: Thurston Cooke, Shannon Kettering, Kirby Glaze, Diana Wheeler, Heather Alhadeff, Yvonne Williams, Marc Pollack, Kenneth Neighbors (not shown)

The City of Morrow recently completed an LCI Study for the Southlake Mall and its surrounding area. The Study made recommendation for creating a town center by redeveloping the out-parcel area between the Southlake Mall and Jonesboro road and retrofitting the Southlake Parkway into a 'main street'. For the longer term, the Plan recommends redeveloping the Southlake Festival Plaza into a Transit Orient Development (TOD) and mixed-use district. The intent is to transition this area from heavily retail oriented district to a mixed-use district that addresses the changing demographics and regional retail competition as well as captures the emerging opportunities.

The client's primary objective was to determine the mechanisms to implement the LCI Study recommendation, to focus on the catalytic elements and specific redevelopment parcel/s and location/s to begin the implementation. The City of Morrow also sought to determine the programmatic elements of the first phase of implementation and the best location for a true catalyst in order for the rest of the vision to be realized. Part of the objective was to ensure that the projects and priorities are feasible in the market. Finally, the client wanted to use recommendations from the TAP to help develop a development package(s) that identify the site(s), program, expected goals, financing/ funding mechanisms, and other incentives to attract the development community.

Primary Panel Recommendations:

Over the course of the day, the ULI panel had significant discussions about the opportunities and recommended priorities in the City of Morrow. Given the economic environment and the panel's perspective on development opportunities in the near term, the recommendations are structured around what the experts believe to be feasible and most likely to attract and/or catalyze investment in the near term. The discussions and priorities are detailed in the following presentation and summarized below.

Upfront: Define a cohesive vision for success in the City of Morrow and make strategic decisions about how to best use the City's constrained resources.

Near term: Focus on aspects of the strategy that are realistic in the near term and create a "heart" for the Morrow community. Make those sites "development ready" for when the market is there.

Long term: Focus on levers that can improve timing and opportunities for turnaround. Continue with parallel, long-term strategy of redevelopment of mall and the area around mall, recognizing that it will take a unique set of circumstances and a long-term phased approach to actualize.

The panelists' key recommended priorities are as follows:

1. Continue to Aggressively Build Relationships and Partnerships
   - Continue to build the human capital relationships necessary to implement a redevelopment plan. Focus, in particular, on developing a strong relationship with Clayton State University (CSU).
   - Institute a "Leadership Morrow" type consortium that works to advance the economic development potential within Morrow.
   - Recognize the University as an important resource and use it to the benefit of the city.
   - Lay the groundwork for a Community Improvement District (CID) with community involvement and University buy-in. Continue to build relationships with the commercial property owners and the University.

- Engage Clayton State and the Archives in an economic development plan and look at the mall as a united economic development strategy. This may include looking at it as a new venue.

2. Focus on Bike/ Pedestrian/ Greenway Improvements as Key Quality of Life Assets and Means to Improve Commercial Assets and Thereby Improve the Fiscal Health of City
   - Determine the gaps in the bike/pedestrian trail then determine what has to be done physically to complete the system.
   - Connect all of your natural and community assets: CSU, Community Center with residential and town green, parks and trails, Reynolds Nature Preserve and highlight that in marketing.
   - Improve streetscape, trail, bike, and pedestrian connections to showcase confidence and pride in the community.
   - Focus on doing the things that will support the commercial/ retail base of the city – for the financial wellbeing of the city. Include streetscape guidelines, redevelopment incentives, etc.

3. Structure Redevelopment Strategy as Parallel Efforts with Mall Area and Neighborhood/ CSU Area
   - Establish the vision – what are the goals and what does the city want to be?
   - Structure the action plan as parallel efforts for (1) the mall and surroundings as detailed in the LCI and (2) for locals.
   - Focus on mixed-use node at Morrow Road for place making. This should be your town center and is the most realistic location for new residential development.
   - Complete a small area plan for a mixed-use node at city hall and along Highway 54 that articulates the character, block layout, and land use mix that could improve and enhance this key opportunity.
   - Initiate a CID or similar structure around mall to work on branding, positioning, and long term sustainability.

4. Implementation and Economic Development Strategies
   - Focus on small pilot, civic programs or projects for early wins and ways to get community buy-in.
   - Identify your lead economic development entity and engage and train its board members so as to further build community leadership capacity.
   - Create one or more Urban Redevelopment Plans which focus on the LCI and the "town center" (described above) and other qualifying areas to further incentivize and drive the pace of redevelopment.

5. Focus on Marketing and Investments that Will Help the Overall Market Turnaround
   - Establish a branding and re-visioning program for the city.
   - Market the 'no residential property tax' as a hook to attract residential and reinvestment and as a tool for residential development in the future; but, the city should limit this abatement incentive to specific period of time (e.g., 5 - 10 years) so as to accelerate the pace of investment.
   - Look at charter school options for address education issues and misperceptions.

What to do first…

The panel had some specific advice on what they would first if they were charged with redevelopment. Some of this speaks to where the priorities should lie and some to how to go about achieving the goals to improve chances for success.

1. Conduct a candid assessment of the existing public assets and determine which are performing, which are under-performing, which are non-performing, and how can you can make them better performing. There may be opportunities with performing assets and the parking deck.
2. Align zoning and regulatory tools with the vision articulated in the LCI and outcomes identified by this TAP.
3. Create, with the Downtown Development Authority, a retention and recruitment package so that time and effort is well-focused on key parcels and with a clear vision.
4. Get together with the property owners to determine what viable options would provide an economic return on investment. Then, identify what is needed to make development happen – financial incentives, zoning exceptions, partnerships, etc.
5. Focus on/ prioritize efforts that create synergy with residents and CSU and having a sense of place such as completing the bike/ pedestrian path.
6. Make sure the website and other communications are done well and reach the broadest possible audience.
7. Begin to identify a project for implementation of streetscape, signage, bike/pedestrian, and greenway.
8. Develop a regional economic development strategy with Southlake Mall, the University, Hartsfield-Jackson International Airport, and Georgia State Tourism. Explore how the mall area could become more of a tourists destination verses a changed employment center.
9. Continue to be a voice and champion on transit station advocacy.

Parting thoughts and general advice…

After putting together the "to do" list of everything imaginable, pick three things to work on and do not do anything else until those three have been accomplished. (HINT: start with three small things)

Continue to actively engage all stakeholders. This can be done through programming and branding that will better engage the property owners and residents/ renters; use online "quality of life surveys," put flyers in schools and the water bill, put a kiosk at the mall – all to solicit better input from those who live and work in Morrow.

Focus on the things that you can control: (1) public realm (2) create framework for redevelopment, don't be a developer, and (3) foster partnerships to champion the new vision for the city.

The City is doing a tremendous job getting past the "previous hurdles" that exist with regard to perception, changing demographics, and an uncertain economy. With such drive and determination, the City will certainly succeed.

The City has a great team in place to undertake these efforts. Do not lose sight of the long term vision because you have the right people in place to make this happen over the long term.

Photos from the event

Kirby Glaze (moderator)
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Mr. Kirby Glaze is currently of Consul to the firm Glaze and Glaze, P.C. and President of Public-Private Partnership Project Management, Inc. and Community Development Partners, Inc. Prior to this, he was Senior Vice President and Chief Legal Counsel for Park Holding, Inc. from 1999 to 2001. In addition Mr. Glaze was a member of the firm Glaze and Glaze where he represented numerous city, county and development authority boards and commissions.

Mr. Glaze has worked on a number of economic development projects and urban redevelopment plans throughout Georgia. He also has presented at various forums on public and private partnerships, intergovernmental contracts, deal structure, public finance and development authority board role and responsibilities. In addition to speaking on subjects of community development, Mr. Glaze has participated in numerous Quality Growth Resource Teams around the state sponsored by the Department of Community Affairs and the Quality Growth Council. In September 2010 Mr. Glaze was recognized by the Department of Community Affairs with the "DCA Outstanding Leadership Award", for exemplary leadership in the field of downtown development.

His professional associations include the State Bar of Georgia, Georgia Economic Developers Association, American Trial Lawyers Association, the Georgia Trial Lawyers Association and Lawyers Club of Atlanta. In the past he served as a board member of the Georgia Municipal Association, chair of the Local Government Section of the State Bar and Member/Director of the Younger Lawyers Executive Committee.

Mr. Glaze served on the Board of the Clayton County Chamber of Commerce and Metro Atlanta Chamber of Commerce and on the executive committee of the Regional Business Coalition. He is a graduate of the Regional Leadership Institute.

Mr. Glaze received a Bachelor of Arts Degree in English from the University of Georgia in 1972 and his JD degree from the University of Georgia, School of Law in 1975.

Heather Alhadeff
Senior Transportation Planner - Perkins + Will
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Heather Alhadeff joined Perkins+Will's Urban Design practice as a Senior Transportation Planner. An accomplished transportation planner and recognized expert, Heather also brings her experience in land use planning, transportation engineering and urban design. She has deep public sector experience, including past roles as the City of Atlanta's Director of Transportation Planning, Central Atlanta Progress' Director of Transportation Management, Senior Planner at the Atlanta Regional Commission and the Federal Highway Administration where she worked with the Albany, Brunswick, Columbus and Savannah MPOs.

Heather specializes in resolving complex land use and transportation situations through logical implementation and creating constituent consensus. She directed the creation and adoption of the Connect Atlanta Plan, Downtown Parking Demand Management Plan, and has worked on the Atlanta Streetcar, Atlanta BeltLine, Regional On-Board Transit Survey, Multimodal Passenger Terminal and Express Bus Routing. She is the recipient of numerous awards including the PEDS Golden Shoe Award, Atlanta Bicycle Coalition Best Planning Initiative of the Year (2008) and Atlanta Business Chronicle's 40 under 40.

Heather earned a Masters in City Planning from Georgia Institute of Technology and a Bachelor of Science in Planning & Economic Development, Cum Laude from Georgia State University.

Thurston Cooke
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Thurston joined Norsouth in 2008 as Vice President, Finance. He leads the firm's equity and debt financing efforts for all new and existing development projects, and assists the principals in the pursuit of new financial partnerships and development opportunities.

Thurston has an extensive background in mixed-income and multi-family housing development. Prior to joining Norsouth, he served as Vice President of the Atlanta office of Bank of America Community Development Corporation, the leading bank-owned real estate development company in the U.S. He also served as a Senior Development Manager for Progressive Redevelopment, Inc. (PRI), a leading non-profit affordable housing developer in Georgia, where he was responsible for over $70 million of development.

A graduate of Davidson College, Thurston also earned a MBA with a concentration in Real Estate from Georgia State University in 2000. He is an active member in the Atlanta district of the Urban Land Institute, serving on the Board of Advisors and co-chairing the Housing Committee. He is also a graduate of the inaugural class of ULI's Center for Regional Leadership Development. He currently serves as Chair of the Board of Directors of the International Community School, a charter school in Avondale Estates. Thurston has also served as an Adjunct Professor and Guest Lecturer of Real Estate Finance in the Master's of City and Regional Planning program at Georgia Tech and as an Elder at Oakhurst Presbyterian Church in Decatur. Thurston lives in Avondale Estates with his wife and two children.

Shannon Kettering
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Shannon, who joined Ecos in 2000, manages the Planning Studio at Ecos. She oversees redevelopment plans; multi-use trails; park and greenspace master plans; land use and zoning recommendations; and community visioning plans. She has conducted presentations for the Georgia Chapter of the American Planning Association, the Atlanta chapter of the AIA Committee on the Environment and Southface Energy Institute's Greenprints. The City of Woodstock Greenprints Master Plan and BeltLine Subarea 3 – Boulevard Crossing reflect her understanding of environmentally sound planning principles

Shannon earned a, Masters in Urban and Environmental Planning from the University of Virginia and a Bachelors of Landscape Architecture from the University of Georgia.

Shannon is an avid snowboarder, neophyte gardener and self-proclaimed terrible cook.

Kenneth Neighbors

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Kenneth M. Neighbors, shareholder with Greenberg Traurig, focuses primarily in the area of Public Finance, providing legal advice in support of public-private partnerships, governmental financing and economic development initiatives ranging from, transportation and integration transit projects, tax allocation district formation and financing, mixed-use, commercial, retail and multi-family real estate financings, to 501(c)(3), community land trust, affordable housing and other tax-exempt bond financings. Ken's work also focuses on the implementation of state and city supported grant programs. Ken also provides business and legal advice in connection with the acquisition, sale and management of real estate holdings and provides general representation in connection with corporate matters and corporate and venture capital financing transactions. Prior to his practice as a lawyer, Ken served as a Merchant and Investment Banker, and as a senior officer of an investment firm focusing on the Emerging Domestic Marketplace (EDM).

Marc Pollack
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Marc S. Pollack serves as the chairman and CEO of Pollack Shores Real Estate Group("PSREG") and is responsible for strategic planning, investor relations, project delivery and supervision of all of the firm's activities. As the founder of Pollack Partners (the predecessor of PSREG), he has created a real estate firm that leverages a process orientation with disciplined teamwork, seasoned experience and unique services for the benefit of its investors.

Marc has more than 30 years of experience as an expert in the multifamily real estate business and has been responsible for the development, acquisition, disposition and management of more than 30,000 housing units valued at more than $2.5 billion.

Prior to founding Pollack Partners in 2006, Marc served as president of Lane Investment and Development, where he led a team responsible for completing 86 projects across the Southeast, including the award-winning mixed-use development Atlantic Station and Lindbergh City Center.
Marc holds a bachelor's degree from Emory University and a master's degree from Georgia State University. An active leader in the real estate industry, he serves on numerous associations and committees, including the Urban Land Institute (ULI), the National Association of Realtors, the Atlanta Board of Realtors and the National Multi Housing Council (NMHC). He is and has been a real estate instructor in the Gozuieta School of Business at Emory University for many years.

A "local" Atlantan for 39 years, Marc enjoys spending time with his family- son Andy and his "better half" wife Robin. His other passions are cooking, travel and music. Active in community and cultural affairs, he serves on the advisory board of Mary Hall Freedom House, a non-profit organization dedicated to improving the quality of life for women and is on the board of the Atlanta Neighborhood Development Partnership.

Diana Wheeler
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Diana Wheeler has been the Community Development Director for the City of Alpharetta for the past eighteen years. Prior to her work in Alpharetta, Ms. Wheeler held comparable positions in South Florida and also served as the President of the Florida Planning and Zoning Association. She is currently a member of the Georgia Planning Association Board of Directors, The Alpharetta Convention and Visitors' Bureau Board of Directors and the Georgia Regional Leadership Institute. Ms. Wheeler holds a bachelor of architecture degree and master of architecture and urban design degree from Columbia University.

Yvonne Williams
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Yvonne Williams has an exceptional record of successes in building public/private partnerships to expand financial resources and implement projects that have produced positive changes for communities. A visionary with extensive knowledgeable about Georgia and economic development, she has a particular talent for grasping a project or issue and finding solutions.

During the past 25 years, as a chief executive, she has helped mold downtown revitalization, industrial development and comprehensive economic development strategy and advocacy in various capacities with the Cobb Chamber of Commerce, Athens Area Chamber of Commerce, the Madison-Morgan County Chamber of Commerce, the Americus-Sumter County Chamber of Commerce, the Bristol Tennessee/Virginia Economic Development Partnership and the Georgia Chamber of Commerce.

Most recently, Williams has been the catalyst in forming business/government partnerships to leverage $500 million in the next five years in major transportation and infrastructure improvements in metro Atlanta's important Perimeter area - one of the largest Class A office markets in the Southeastern United States. Williams was selected president of the newly formed DeKalb Perimeter Community Improvement District in 1999. She was appointed president of the joint DeKalb/Fulton PCIDs, which she helped organize, in 2001.

Through Williams' leadership, this precedent-setting collaborative of the largest urban communities in Georgia is spearheading projects such as the following:

- $20 million in intersection and streetscape improvements to improve traffic flow, pedestrian accessibility and attractiveness
- $6.5 million in Livable Centers Initiative grants from the Atlanta Regional Commission to help create "smart growth" live, work and play centers
- Advocated for the accelerated construction of a $32 million Perimeter Center Parkway Flyover Bridge over I-285 to provide alternative access to commuters, residents and shoppers
- Championed a unique multi-agency partnership that will result in accelerating the Hammond Half-Diamond Project estimated at nearly $18 million at least 5 years ahead of schedule.

Recent appointments include:

- ✓ Governor's Commission on City of Dunwoody
- ✓ Governor Perdue's Congestion Mitigation Task Force
- ✓ Regional Atlanta Civic League

- ✓ Northside Hospital Foundation
- ✓ Board member Georgia, Chamber of Commerce
- ✓ Board member, Georgians for Better Transportation
- ✓ DeKalb Police Alliance – Founding Board Member
- ✓ Governor Perdue's Sandy Springs Interim Government Commission
- ✓ Congressman Tom Price's Advisory Council Task Force for Transportation and Local Issues
- ✓ Sandy Springs Comprehensive Planning Commission
- ✓ Governor's Commission on City of Sandy Springs

Williams has a bachelor's degree in public relations from the University of Georgia. She is a six-year graduate of the Institute for Organization Management, a graduate of the Economic Development Institute of the University of Oklahoma and was among 120 non-profit executives from throughout the country selected to participate in the Harvard Business School's Strategic Perspectives in Non-Profit Management Program during the summer of 2006.