



**Urban Land
Institute**

North Texas

2014 ANNUAL REPORT TO THE REGION

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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.

The Urban Land Institute is an international organization of volunteers renowned for the quality of its educational programs, the value of its networks, and the dedication of its members to giving back to their communities. ULI North Texas, one of over fifty such local councils in the US, has been in existence for over ten years. We appreciate the time, energy and dedication of our volunteer leadership team who have positioned us for an exciting period of growth.

During the 2103-14 ULI program year we took significant steps to increase our impact on the North Texas region. Highlights of the past year are briefly noted below, and a calendar listing more of our activities is also included in this report. We are proud to present this annual report to our members and the North Texas real estate community.

COMMUNITY OUTREACH

Our **UrbanPlan** classroom program is one of the strongest in the nation. We train teachers in this curriculum and our members volunteer as classroom team advisors and ultimately as judges of this innovative “hands-on” program teaching real estate development principles, negotiating skills and financial accountability. Students report seeing their neighborhoods with new eyes after participating in UrbanPlan. Under the leadership of Phillip Bankhead of Northmarq, UrbanPlan was taught in seven classes with over 150 total students in four schools during the 2013-14 school year. Our team of 94 volunteers donated hundreds of hours of time having an estimated value of over \$70,000. This marks the 9th full year of UrbanPlan in our NT District Council, with almost 1700 students having participated.

Dr. Stephen Waddell, Superintendent of Lewisville ISD, stated “ULI’s UrbanPlan has been a great model for our district showing the impact that project based learning can have on our students. It requires them to communicate their ideas, work collaboratively and be innovative...that’s academic rigor.”

The **Technical Advisory Panel** (TAP) program is one of ULI’s best known community services. At the request of a city or other public agency “sponsor,” the TAP volunteers conduct intensive two day workshops to analyze a specific community problem areas and make recommendations for change. In the spring of 2014, ULI NT organized its first TAP committee, headed by Mark Meyers of TBG and Marc Kurbansade of the City of Rowlett. The TAP Committee began exploring possible sites for its first workshop, and selected a site just south of downtown Fort Worth and in the Fort Worth South TIF zone for a TAP dealing with affordable housing and transit oriented development.

CREATING IMPACT THROUGH PROGRAMS AND EVENTS

Education of ULI members and the broader real estate community is a key mission for ULI NT. In our 2014 program year, under the leadership of Programs Chair Howard Altshuler of EY, we more than doubled the number of substantive events we offered to the region. Our annual Emerging Trends program drew over 250 attendees. We instituted a popular new breakfast forum series, with topics ranging from Form Based Zoning to EB 5 Financing. We held an on-campus debate at SMU, arguing the pros and cons of price disclosure in commercial real estate transactions. In partnership with other local organizations, we conducted a program focused on the development proposed for Dallas Midtown.



2014 ANNUAL REPORT TO THE REGION

To implement the national ULI focus on Building Healthy Places, we formed the ULI NT Building Healthy Places Task Force, chaired by Jim Manksey of TBG. Our Task Force partnered with other Texas District Councils and obtained an Urban Innovation Grant. Task force representatives also served as panel members for “What’s Next – Building Healthy Places” in May.

To determine the impact of ULI’s programming, a survey was conducted in connection with the What’s Next program, and 47% of the respondents reported changing work-related decisions as a result of information learned at ULI events about the connections between health and the built environment.

Members of the BHP Task Force traveled to Houston in June for a workshop that began to identify the Building Blocks of healthier development in Texas. The results of that workshop and examples of Texas developments highlighting innovative health features are summarized in the report “Building a Healthier Texas” found on the ULI North Texas website.



ULI North Texas has three active Local Product Councils. In February of 2014, the Transit Oriented Development Council held a “TOD Summit” attended by more than 200 members and regional leaders. The program offered such a strong illustration of how transit oriented development can be achieved that our Tarrant County members requested a similar program in Fort Worth, scheduled for October of 2014.

BY THE NUMBERS: MEMBERSHIP AND SPONSORSHIP

From July 1, 2013, to June 31, 2014, ULI NT membership increased by over 8 percent, to 850 members; of these, approximately 225 are Full Members, participating in ULI activities at the highest level. Our annual sponsorship grew from \$30,000 to over \$100,000.

Recognizing that engaging and retaining existing members is key to growing ULI North Texas, the Membership Committee, headed by Tim Glass of the City of Dallas, held a series of welcome events for new members to meet committee leaders and to learn about active ULI involvement. A reception at the NYLO Hotel and a Holiday Party overlooking the Dallas Arts District from Museum Tower offered members and guests opportunities for networking.

An important new ULI program, the Women’s Leadership Initiative, was started in North Texas under the direction of Janet Protas, also of the City of Dallas. Kathleen Carey, ULI’s Chief Content Officer and a founder of the WLI program, came to Dallas to kick off the local group. The goals of the WLI include increasing participation and visibility of women within ULI, so a subsequent meeting entitled “ULI 101” focused on climbing the ladder within the organization. *The number of women members in ULI NT increased by 25% in 2013-14.*

BUILDING FOR THE FUTURE

With the rebounding economy and rapid growth anticipated in North Texas, local ULI leadership determined that the District Council had the opportunity to grow in its visibility and impact. To help the organization move forward, in July of 2013, ULI North Texas hired its first-ever Executive Director, Pamela Stein, formerly a shareholder practicing commercial real estate law in the Greenberg Traurig firm and holder of a Master’s Degree in Regional Planning as well as a JD.

2014 ANNUAL REPORT TO THE REGION

Another key step in growing ULI NT was the creation of a Strategic Plan. Using membership surveys and leadership meetings held in January of 2014, goals and priorities were identified. The tasks of reaching those goals were allocated to restructured committees, designed to offer more opportunities for member involvement. The Strategic Plan includes recommended strategies and action items to be implemented by each committee

In December of 2013, ULI North Texas received the exciting news that the North Texas District Council will host ULI's largest annual conference, Fall Meeting, in 2016. The Management Committee and other leaders of ULI NT are already focusing on this important event, and are working to build membership and financial support of ULI NT in advance of Fall Meeting 2016.



SHARING BEST PRACTICES

Our members value the ability to get to know each other and share information in settings of mutual respect and trust. At the national level, the National Product Councils provide such opportunities. In North Texas, we have three Local Product Councils meeting on a regular basis to allow members to network in these smaller settings and to focus on issues in their particular areas of concentration.

Our Transit Oriented Development Council developed a comprehensive chart of regional transit stations and ranked all for TOD opportunities, and presented this information to the public in their TOD Summit in February of 2014. Our Community Development Council (CDC) and Urban Development/Mixed Use Council (UD/MUC) met together to explore the best take-aways from national meetings. The CDC and UD/MUC also traveled to Austin in September of 2013 to participate in a series of mobile workshops and discussions with their counterparts from around the state.



YOUNG LEADERS

The ULI NT Young Leaders group hosted a full calendar of programs including the “Leading the Way” informal breakfast talks and the Partnership Forum, a year-long program of in-depth studies of some of the region’s most innovative developments. In the 2103-14 program year, the YL group also organized several mobile workshops open to all members, ranging from the latest downtown Dallas apartment projects to the farm-centered Harvest development near Alliance.

The annual DFW Awareness Event, organized by the Young Leaders, was held in the new Parkland Hospital building. This regionally significant medical facility provided an impressive setting to showcase the recent development projects selected for the event by the Young Leaders.



2014 ANNUAL REPORT TO THE REGION

2013-2014 CALENDAR OF EVENTS

- January 16** **Inaugural Breakfast Forum: Mixed Use and Form Based Zoning: the Shape of Things to Come?** Location: Park City Club, 7:30-9:30 am
- January 21** **Midtown Mania Program**
Co-Hosted by: ULI North Texas, SMPS and CoreNet Southwest Chapter
Location: Westin Galleria Dallas, 11:30 am – 1:00 pm
- January 29-30** **Strategic Planning Meetings** for ULI NT leadership; Location: Park City Club
- February 6** **Transit Oriented Development Summit: Texans DO Ride Transit! The Success of Transit and Transit Oriented Development in North Texas**
Location: Renaissance Hotel, Richardson, 7:30 am-12:15 pm
- February 26** **“Leading the Way” YLG Mentoring Program,** Location: Pacheco Koch
- March 4** **ULI North Texas/GFWREC Program and Reception**
Hosted by YLG; Location: The Bird Café, Fort Worth 5:00-7:00 pm
- March 6** **Women’s Leadership Initiative Kickoff Event** featuring Kathleen Carey, ULI’s National Chief Content Officer; “The House” in Victory Park, Dallas 4:30-6:30 pm
- March 27** **Too Many Secrets: A debate on the issue of public disclosure of commercial real estate transaction prices**
Location: EY Gallery at the Fincher Building, SMU Campus; 4:30 pm to 6:30 pm
- April 3** **Breakfast Forum on EB-5 Financing**
Location: Park City Club, 7:30-9:30 am
- April 10-11** **Forum on The Relationship between Public Health and the Built Environment,** UNT Health Science Center Campus, Fort Worth; joint event with ULI NT, UNT Health Sciences and Blue Zones Fort Worth
- April 17** **6th Annual DFW Awareness Event – Hosted by YLG**
Location: the New Parkland Hospital, 5:30 -7:30
- April 25** **Water and the Economy of North Texas-US Green Building Council and ULI;**
Location: Fair Park, 1-5 pm; Register with USGBC
- May 1** **ULI National Professional Development Seminar: Private Equity Capital: Understanding and Navigating the Options** Register on ULI national home page, www.uli.org; Location: Stoneleigh Hotel, 7:30 am-5:00 pm
- May 8** **A ULI Signature Event: What’s Next? Exploring the Value Proposition in Building Healthy Places;** Presentation and break-out sessions organized by development types. Location: Irving Convention Center 7:30-11:00 am
- May 15** **YLG Networking Reception;** Truck Yard, Greenville Ave., Dallas; 5:30 - 7:30 pm

2014 ANNUAL REPORT TO THE REGION

May 27	Building Healthy Places State-wide Task Force meeting in Houston; all day
May 29	Women’s Leadership Reception “Unlocking the Secret Handshake” Location: ULI Office, 5-7 pm
June 19	ULI North Texas- Sylvan Thirty Tour and Networking Reception Location: Sylvan Thirty, 4:30 PM – 7:00 PM
July 11	ULI Annual Infrastructure Event: Shifting Suburbs Location: Westin Galleria, 7:30-9:30 am
July 26-30	ULI National District Council Leadership Retreat/Training; Location: Beaver Creek, CO
August 16	New Member Coffee hosted by Membership Committee; Location: La Madeleine, 7:30-8:30 am
September 19	Membership Open House; Location: NYLO at Southside 5:30-7:30 pm
September 26-27	Texas Local Product Council State-wide Conference, Location: Austin
October 2	Fort Worth Area Full Member and Leadership Reception, Location: Fort Worth Club, 5:30-7 pm
October 17	Green Sustainable Buildings: Are They Worth It? A Case Study; Location: W Hotel Victory Park; 7:30-9:30 am
Oct 25	YL Mobile Workshop tour of Hillwood’s Harvest Development; meet at Alliance 9:30 am
October 30	Dallas Area Full Member and Leadership Reception, Location: Dallas Country Club, 5:30-7 pm
November 5-8	ULI Fall Meeting, Chicago, Illinois ALL TEXAS HAPPY HOUR Fulton’s on the River. Nov 6, 6-8 pm
November 19	Emerging Trends in Real Estate Forecast Location: Westin Galleria Dallas 7:30-10 am
December 11	Holiday Party, Location: Museum Tower, Dallas Arts District; 5:30-7:30 pm

MANAGEMENT COMMITTEE AND ADVISORY BOARD MEMBERS

ULI North Texas Management Committee

Robert Folzenlogen, Hillwood, Chair

Michael Jackson, Wynne/Jackson, Inc., Vice Chair

Jud Pankey, Prescott Group, Treasurer

John M. Walsh, III, TIG Real Estate Services, Inc., Governance Chair

Frank Turner, City of Plano, Vice Chair of Mission Advancement

ULI North Texas Advisory Board

Howard Altshuler, EY, Programs Chair

Kelly Ansley, Stewart Title, Programs Co-Chair

Tyler Arbogast, James R. Harris Partners, LLC

Phillip Bankhead, NorthMarq, UrbanPlan Chair

Travis Baxter, Duke Realty, Young Leaders Group Chair

Frank Bliss, Cooper & Stebbins, Co-Chair of Urban Development Mixed-Use Council (UDMUC)

John Brownlee, HFF, Co-Chair of Urban Development Mixed-Use Council (UDMUC)

Jeff Davis, Republic Title, Sponsor Representative

Betsy del Monte, Transform Global, Vision North Texas Representative

Mark Drumm, Stratford Land, Co-Chair of Community Development Council (CDC)

Bo Feagin, Republic Title, Sponsor Representative

Don Gatzke, The University of Texas at Arlington

Tim Glass, City of Dallas, Membership Chair

Rodney Hall, Executive Search & Consulting, Co-Chair of Community Development Council (CDC)

Brian Leslie, Prescott Group, Co-Chair of Transit-Oriented Development Council (TODC)

Jim Manskey, TBG Partners, Building Healthy Places Chair

Mark Meyer, TBG Partners, TAPS Chair

Charlie Myers, MYCON General Contractors, Inc.

Robert Pilgrim, BURY, Sponsor Representative

Janet Protas, City of Dallas, Women's Leadership Initiative Chair (WLI)

David Rodriguez, Rodriguez Consulting, Sustainability Chair

Mark Seiley, PBK, District Council Past Chair

Alan Stewart, Lakeside DFW, Inc.

Dana Walters, MYCON General Contractors

Jared Rooker, Perkins+Will, Communications Chair

Monty Watson, The Watson Firm, Co-Chair of Community Development Council (CDC)

Jack Wierzenski, Dallas Area Rapid Transit, Co-Chair of Transit-Oriented Development Council (TODC)

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