

Promoting
**Cross-Sector
Partnerships**
for
**Equitable
Transit-Oriented
Development**

April 2011

About the Urban Land Institute

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.

Established in 1936, the Institute today has nearly 30,000 members worldwide, representing the entire spectrum of the land use and development disciplines. ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of the world's most respected and widely quoted sources of objective information on urban planning, growth, and development.

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About the Annie E. Casey Foundation

The Annie E. Casey Foundation is a private charitable organization, dedicated to helping build better futures for disadvantaged children in the United States. It was established in 1948 by Jim Casey, one of the founders of UPS, and his siblings, who named the Foundation in honor of their mother.

The primary mission of the Foundation is to foster public policies, human-service reforms, and community supports that more effectively meet the needs of today's vulnerable children and families. In pursuit of this goal, the Foundation makes grants that help states, cities and neighborhoods fashion more innovative, cost-effective responses to these needs.

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ULI also appreciates the contributions of the forum participants, listed at the end of this report. Their ideas, insights, and candor were key to the success of the forum and the creation of this publication. All errors, omissions, and mistakes of interpretation are the responsibility of ULI.

Acronyms and Abbreviations

ABI	Atlanta BeltLine Inc.
ABLP	Atlanta BeltLine Partnership
ADA	Atlanta Development Authority
DBE	disadvantaged business enterprise
ha	hectare
HUD	U.S. Department of Housing and Urban Development
IRR	internal rate of return
km	kilometer
LRT	Light Rail Transit
MARTA	Metropolitan Atlanta Rapid Transit Authority
MLK	Martin Luther King, Jr., Way
RTD	Regional Transportation District
RVCDF	Rainier Valley Community Development Fund
ST2	Sound Transit 2
TAD	Tax Allocation District
TIF	tax increment financing
TOD	transit-oriented development

Report Overview

In November 2010, the Urban Land Institute (ULI), with funding from the Annie E. Casey Foundation, hosted a forum in Washington, D.C., to explore how various sectors—including private sector developers, philanthropy, governments, transit service providers, and advocates—can better work together to achieve equitable transit-oriented development (TOD). What does it take to create and sustain these challenging partnerships? What are effective strategies, and what are some strong operating principles for moving forward?

ULI and the Annie E. Casey Foundation identified four transit corridors with existing or emerging partnership strategies to focus on in the forum: the Denver West Corridor Line, the Seattle Central Link, the Minneapolis–St. Paul Central Corridor, and the Atlanta BeltLine. Representatives from each sector in each of the four corridors were identified and invited to the forum. In advance of the forum, case studies of the partnership activities in each corridor were prepared and distributed to all attendees.

This report documents the following components:

- Summary of the November 2010 forum, “Promoting Cross-Sector Partnerships for Equitable Transit-Oriented Development”;
- Ten Principles for Cross-Sector Partnerships for Equitable Transit-Oriented Development, developed by forum participants; and
- Case studies of the Denver West Corridor, the Seattle Central Link, the Minneapolis–St. Paul Central Corridor, and the Atlanta BeltLine.

The ideas offered in this report are intended to serve as a departure point for further discussions between leaders from sectors across the country interested in using cross-sector partnerships to build more equitable mixed-income communities.

Forum Summary

TOD is widely viewed as a catalyst for sustainable urban revitalization, yet planners and implementers of TOD struggle with how to ensure that such development—and the opportunities it can create—benefit everyone in a community. Although equitable TOD has been defined in a variety of ways, its goal typically is articulated as ensuring that the planning process for TOD is open and inclusive and that the benefits and opportunities that TOD creates are shared by a broad range of income groups.

Techniques for reaching this goal include the following:

- Expanding housing options for working families and seniors near train stations and bus routes;
- Leveraging transportation infrastructure investments to revitalize distressed neighborhoods while taking measures to prevent low-income residents from being priced out;
- Connecting local residents and businesses to employment and contracting opportunities created by these investments; and
- Intentionally engaging disadvantaged communities in decision making to ensure that development meets their needs.¹

In recognition of the experience that planning for and implementing equitable TOD generally involves multiple cross-sector partnerships of participants from advocacy groups, foundations, government, transit providers, and private sector developers, ULI and the Annie E. Casey Foundation jointly sponsored this forum, to which they invited more than 30 representatives of these various sectors from four metropolitan areas with emerging transit corridors to discuss how such partnerships can learn from each others' experiences and work more effectively to plan for and implement equitable TOD. Throughout the daylong session, forum participants engaged in forthright and stimulating discussions about the lessons they have learned. They also went through a brainstorming process to identify principles for how such partnerships can work more inclusively and effectively to reach their goals. Paul C. Brophy, principal at Brophy & Reilly LLC, facilitated the discussion.

In welcoming forum participants, ULI president Patrick Phillips commented that equitable TOD “is of key interest to ULI because it exists at a point of intersection in our set of priorities, which include affordable and workforce housing, infrastructure and sustainability, capital markets, and leadership. Obviously, this particular topic touches on all of those.” Charles Rutheiser, senior fellow at the Annie E. Casey Foundation, expressed his hope that the meeting would help foster the further development of a community of practice around equitable TOD.

¹ Adapted from Living Cities press release, “New Working Group to Coordinate and Attract \$150 Million for Economic Development and Opportunity,” October 14, 2010, <http://www.livingcities.org/press/releases/?id=14>.

Case Study Review

ULI managing director for infrastructure Rachel MacCleery presented case studies on the work of partnerships in the four transit corridors represented—Denver’s West Corridor, Seattle’s Central Link, the Minneapolis–St. Paul Central Corridor, and the Atlanta BeltLine—which were supplemented by additional insights from panelists and other participants. They discussed the many challenges they have faced in forming and working through cross-sector partnerships, including inadequate or ineffective community engagement processes; lawsuits and other conflicts; difficulties convincing private developers and capital markets that mixed-use and mixed-income housing projects can be viable and valuable elements of TOD; tensions between regional planning and local issues; and a commonly perceived lack of trust among the advocacy, governmental, transit, and private development sectors. Brief summaries of the four case studies follow; the in-depth case studies can be found on pages 23 to 36.

Denver’s West Corridor

A partnership of the city and county of Denver, Enterprise Community Partners, the Urban Land Conservancy, and other groups—with funding from the MacArthur Foundation and other foundations—has created a \$15 million TOD Fund. Among other activities, the fund will hold key land parcels along the 12-mile (19-km), 12-station Denver West transit corridor for later redevelopment as mixed-use, mixed-income projects, with the goal of preserving or creating 1,200 units of affordable housing. The light-rail line, which is expected to open in 2013, straddles several jurisdictions and runs through a number of lower-income and Latino communities. It is part of the larger FasTracks system, which is being built by the Regional Transportation District (RTD) and funded by a regional sales tax that was approved by a referendum. In addition, FRESC (formerly the Front Range Economic Strategy Center) and a number of other organizations have launched the West Alliance, which aims to create economic opportunities for West Corridor residents by providing jobs, training and education, and business opportunities.

Much of the land around the West Corridor has been upzoned, resulting in price speculation and unrealistic expectations about what the market will bear. Jurisdictions along the line are wary of taking on too much affordable housing. Because the area relies heavily on sales taxes, local governments often push for retail development, rather than affordable housing, along the corridor.

Bill Sirois, director of TOD for the RTD, commented that the concepts of equitability and partnerships in TOD—which were not even being discussed 15 years ago—have evolved quite a bit since then. Noting that all of the development activity that has taken place around Denver’s transit stations in the past two years has consisted of affordable housing, he added that the challenge will be to maintain this activity when market-rate development returns. In September 2010, the RTD adopted a TOD policy that reflects a more focused approach to affordable housing. The policy requires the RTD to work with local jurisdictions, typically housing authorities, to set goals for affordable and mixed-income housing in the development of land around transit stations. “One of the challenges we face is that, as a transit agency, our primary mission and goal is not affordable housing,” Sirois commented, “so we have to come up with a flexible approach that we can use on a case-by-case basis.” He added that the RTD expects to begin some pilot projects next year.

Seattle's Central Link

The Central Link, which began operating in July 2009, is part of the 53-mile (85-km) Link light-rail system being built by Sound Transit. The Central Link runs through culturally rich communities of color, which historically have been the victim of redlining and disinvestment. The area is home to a number of people of limited means, many of them foreign born, and an array of family-owned ethnic businesses. The Puget Sound Regional Council sets overarching land use and transportation policies for the region, while the city of Seattle is responsible for the city's comprehensive plan as well as neighborhood and station-area planning. The Seattle Housing Authority, through two HOPE VI projects, is building 2,500 housing units—including 1,000 affordable units—and the city also provides incentives to encourage for-profit developers to develop affordable housing. The Rainier Valley Community Development Fund is helping address construction-related effects on nearby businesses.

The Puget Sound region also is using a Sustainable Communities Regional Planning Grant from the U.S. Department of Housing and Urban Development (HUD) to convene stakeholders around efforts to address equity concerns in transit corridors. The state constitution's prohibition on the use of public funds for "private benefit" has presented challenges to the creation of tax increment financing (TIF) districts, public authorities, and other types of partnerships typically used to plan and fund TOD. Lacking such techniques, the city has relied heavily on zoning—an awkward tool—to create development incentives.

As in other regions, many local residents fear displacement by new TOD; ongoing engagement is needed to reach out to them. Participants from Seattle noted that as rail transit has come online and adjustments to the overall system have been made, bus service has suffered in some cases. These service cuts affect poor residents most.

Diane Sugimura, director of planning and development for the city of Seattle, commented that although the region has been slow to accept light rail, the city did some neighborhood and station-area planning in the 1990s and early 2000s. "The main zoning changes made at that time were to shift from auto-oriented zoning to more pedestrian-friendly zoning, but there was very little increase in development capacity," noted Sugimura, adding that those changes included banning drive-in businesses and enacting no-parking requirements at station areas.

In 2009, when the city began working on neighborhood plan updates, it started by looking at three Central Link station areas in southeast Seattle. The city discovered that some of the neighborhoods in those areas now have populations with a significant proportion of people of color, and in some, as many as half the residents are foreign born. "Realizing that we needed to do outreach in a very different way, we hired community residents, including young people, the elderly, the disabled, and people of color—people who traditionally did not come to planning meetings—as planning outreach liaisons," Sugimura added. When they held meetings within these communities—with simultaneous translation—planners learned that what members of all of the communities wanted were vibrant, multicultural town centers. Maintaining the existing affordable-housing stock is an issue in these communities, as are gentrification and keeping small ethnic businesses viable, density and intensity of development, and parking.

Minneapolis–St. Paul Central Corridor

This 11-mile (18-km) light-rail line, which is scheduled to open in 2014, will connect five of the Twin Cities' economic centers with 18 stations. As one participant noted, "It is the lifeblood of our ability to stay connected to the region." The line will run through diverse and economically challenged neighborhoods with 120,000 residents, 23 percent of whom are below the poverty line and 44 percent of whom are people of color. A number of formal and informal partnerships are involved; the Metropolitan Council will build and operate the line, which is being funded in part by the Counties Transit Improvement Board through dedicated sales tax revenues from five counties. The Central Corridor Partnership, a business-led coalition, aims to promote the Central Corridor and advocate for a fully integrated transportation system. And the Central Corridor Funders Collaborative, which leverages the investments of 12 local and national foundations for the benefit of low-income residents and residents of color, is focused "beyond the rail," seeking to foster affordable housing, a strong economy, vibrant transit-oriented places, and effective collaboration.

John Couchman, vice president of The Saint Paul Foundation (now retired), commented that "on the affordable housing front . . . the primary issue that we face along a large part of this line is the preservation of affordable housing. We have a lot of older single-family housing, and we need . . . a strategy that will allow us to maintain that as affordable housing" in the face of pressure from transit. Couchman and other participants noted that the construction of Interstate 94 (which runs parallel to the light-rail line) destroyed a thriving African American community in St. Paul in the 1960s and that this experience continues to shape how residents view transportation plans and projects.

The Funders Collaborative is working with the Local Initiatives Support Coalition and neighborhood groups to convene a multisector working group to address these issues and explore ways to leverage expected development along the corridor to provide new affordable housing and limit involuntary displacement. The Funders Collaborative also has created the Business Resources Collaborative (BRC), which is developing a joint strategy for construction mitigation, business development, and long-term economic development. The BRC's "Ready for Rail" campaign is helping businesses along the line adapt to the coming changes, and a Joint Committee on Equal Opportunity and Disadvantaged Business Enterprise is working to boost women's and minority workforce involvement.

Couchman focused on the importance of—and the tremendous amount of work involved in—developing partnerships, both within and among different sectors. "When we started the Central Corridor Funders Collaborative, one of the first things we did, with the help of Sam Zimbabwe of the Center for TOD, was to map out all of the players. Sam came back with an elaborate diagram of 100-plus key players. It was mind boggling." Couchman went on to describe the many different groups now cooperating and collaborating, both within and among the governmental, community, and philanthropic sectors, on the Central Corridor project.

Atlanta BeltLine

The Atlanta Development Authority (ADA) formed Atlanta BeltLine Inc. (ABI) to build a network of 1,300 acres (526 ha) of public parks, 22 miles (35 km) of rail transit, and 33 miles (53 km) of multiuse trails along a historic railroad corridor that circles downtown Atlanta and connects 45 diverse neighborhoods whose residents range from disadvantaged to wealthy. Other partners include the Atlanta BeltLine Partnership

(ABLP)—which has a diverse board consisting of civic, business, and faith leaders, and which is serving as a catalyst to mobilize resources and build community support—as well as the PATH Foundation, the Trust for Public Land, the Metropolitan Atlanta Rapid Transit Authority (MARTA), numerous city agencies, and other organizations.

Unlike the other projects discussed at this forum, work on the Atlanta BeltLine is not yet underway; transit construction is expected to begin within five to seven years. Another unique feature of the project, as Brian Leary, ABI president and chief executive officer (CEO) pointed out, is that it will involve little to no direct displacement of existing residents or businesses because the BeltLine will be built along existing latent infrastructure.

ABI is convening stakeholders to ensure that equity considerations are addressed as planned public and private investments in the BeltLine project move forward. The organization has drafted an equitable development plan using principles put forward by PolicyLink.

The BeltLine Affordable Housing Trust Fund, which is funded with a setaside from the Atlanta BeltLine Tax Allocation District (TAD) funds being used to build the BeltLine, has a goal of creating 5,600 units of affordable housing—30 percent of which must be built through community housing development organizations—over 25 years. A community benefits provision attached to the TAD enabling legislation includes a “first source” job policy that prioritizes the hiring of local residents for BeltLine construction, and ABI is working with local communities to establish additional community benefits agreements. The BeltLine is expected to create 30,000 new permanent jobs for the region.

“We’re building something that’s both city serving and city shaping at the same time,” added Leary. “In the more affluent neighborhoods, this challenge will involve creating new affordable housing; in poorer neighborhoods, it will involve developing mixed-income housing that will attract much-needed goods and services, retail and jobs.”

Lessons Learned

Following the panel presentations, Brophy asked other participants from each of the four areas to weigh in with additional comments on their experiences. From Denver, Robin Kniech, program director for FRESC, commented on how low- and very-low-income residents often find having a voice in official planning processes difficult, noting that a community organizing process can help give them that voice—and make them part of the partnership process.

From Seattle, Howard Greenwich, policy director for the Puget Sound Sage, agreed with Kniech about the importance of involving community residents in this process, describing a civic leadership institute there that is helping bring a group of residents up to speed on transit and TOD issues to enable them to “engage more in making sure that the light rail that’s come through their communities is going to benefit them and help preserve their communities.” Federal Transit Administration regional administrator Rich Krochalis applauded the Seattle Housing Authority for its entrepreneurial approach. Sugimura added that her approach is to make sure transit investment “serves broadly from the positive perspective and doesn’t impact disproportionately from a negative perspective.”

From the Twin Cities, Eric Muschler, program officer with the McKnight Foundation, focused on the importance of a neutral learning agenda, in which all partners take the attitude that “we’re going to learn together, across sectors, to do this right,” which helps keep a balance of power that in turn helps partners have difficult conversations and come to solutions. Couchman noted that “what is equitable is in the eye of the beholder” and that identifying who speaks for the community is a key challenge.

From Atlanta, Mtamanika Youngblood, president and CEO of Sustainable Neighborhood Development Strategies, Inc., described the Community Economic Development Institute, a six-month leadership program created by the Annie E. Casey Foundation, Georgia Tech, and the University of Georgia to train residents in the basics and practices of economic development that is enabling them to become fully engaged in the planning process—and commented that displacement concerns are not limited to low-income communities, noting that even residents of more affluent neighborhoods along the BeltLine are worried about negative impacts and displacement from the new investment. Healthy communities, others noted, are mixed racially and economically.

Making It Work

Jonathan Sage-Martinson, director of Minnesota’s Central Corridor Funders Collaborative, convened a second panel to address the roles of various partners in balancing financial realities and social equity goals. He introduced the discussion by describing the inherently complicated process of equitable TOD: “It requires lots of players to pull lots of levers and set lots of policies. These include transit planning, transit financing, transit development and operations, as well as development planning, development financing, the building of the development. All of these actors are involved in each of those steps happening at different times. It’s a lot to coordinate! Then, when you add ‘equitable’ or ‘responsible’ development on top of that, it brings in a whole new set of partners involving a whole new set of timelines and requirements, making this even more complex.”

Transit Provider

MARTA CEO Beverly Scott presented the perspective of a transit provider and briefly described the Atlanta experience. She stressed the importance of a transit agency basing its decisions and actions on clearly defined guiding principles and policies, commenting that “we have to be anchored by what we are trying to accomplish at the end of the day.” MARTA’s board of directors, for example, has reviewed its vision, values, and mission and determined that its number-one priority, relative to TOD, is ridership. Therefore, its driving force as it moves ahead will be to encourage projects that increase transit ridership and get people out of single-occupancy vehicles. After about 18 months of work, the board recently adopted a set of seven TOD principles that call for a goal of 20 percent affordable housing, reduced parking requirements, sustainability, disadvantaged business enterprise (DBE) participation, and more.

Scott also focused on the importance of looking at more than just the altruistic nature of equitable TOD. “We need to be able to show the value to society of doing it this way,” she added, noting that the industry must develop new metrics that allow it to demonstrate how this type of development improves community health as well as job and educational opportunities, how it enables people to age in place, and so forth.

The bottom line, she concluded, is that transit providers and other partners in the process must recognize where and how they can best contribute to the process, respect and appreciate what knowledge and skills

they can contribute and—just as important—what they do not know, and work together to lay the ground-work for successful equitable TOD. “For the developer, time is money. Partnerships need to work together to make sure that things like permitting and reviews go smoothly. We should do whatever needs to be done to streamline the process.”

Community Advocate

Robin Kniech, program director for FRESC in Denver, presented what she described as “the troublemaker perspective” of a community organizer. Positing that partnership is not always the best model for negotiating with private developers for equitable TOD, she asserted that, because of a lack of metrics and shared knowledge—and thus an imbalance of power—community coalitions and other advocacy groups generally cannot know what the “tipping point” is that would make a project infeasible for a developer.

Kniech averred that the community-organizing model, whereby the community group makes its needs and wants known to the public, elected officials, and other advocacy groups to make the case that “more is possible” can bring developers back to the negotiating table and convince them to agree to community benefits that they originally said they could not afford to include. “Only after the equalization of power is partnership possible, and then beautiful, amazing things can happen,” she contended. “I want to encourage us to be open to the fact that, to get to some of these equitable outcomes, partnership—while it is the end goal—may not be the only model.”

Private Developer

Seattle developer Jim Mueller, managing partner of JC Mueller LLC, noted that developers often are members of the communities in which they work and thus have an interest in seeing these places thrive. Introducing what he dubbed the “curse of the IRR,” he described how the internal rate of return used to gauge investment success emphasizes short-term investments, encourages maximum use of leverage, and relies on easy comparisons with alternative investments—all factors that put real estate development projects at a disadvantage. He then described the “curse of the capital stack,” explaining how the ratios of equity (in the financial sense), mezzanine, and first-trust debt financing have shifted in recent years, requiring developers to put up much more money themselves and making financing even harder for them to attract. He explained the developer’s role as “holding back this wave of capital” and described how he and other relatively small, local developers work to develop TOD projects in their communities while balancing the needs and demands of the communities with those of the investors who are financing their work—and who must get a defined return on that investment.

Mueller went on to present some suggestions for how developers, local jurisdictions, and nonprofit organizations can approach each other to create equitable TOD projects. All three groups, he suggested, should be accessible, transparent, and open minded, as well as willing to accept opportunities to collaborate. Developers also should use what he termed “the shoe leather method,” educating themselves about a community’s needs and assets—and making themselves known to the community—by speaking informally with residents in local bars, attending meetings of the local small business association, and so forth. He recommended that developers learn about and consider the community before making plans about how much and what types of housing, retail, and other features to include in a project, which also will help result in a project that meets the neighborhood needs. Finally, he counseled developers to do well by doing good.

Speaking to those who seek to partner with developers, Mueller recommended that jurisdictions manage their processes proactively, address land issues early, and be willing to lead to make equitable TOD projects a reality. Nonprofit groups, he urged, should be realistic, be early, and expect to participate and create benefits or value for the other parties involved in the project. Being early is key for both parties, he urged; if one party makes new demands for additional community benefits after the developer has raised money, done market research, found the property, worn out shoe leather in the community, begun designing a project, and made promises to investors, most developers simply cannot be cooperative. “Blindsiding people is just not the way to get things done,” he contended.

Bridging the Gaps

The discussion that followed among the three panelists and other participants focused on how partners can work together to bridge the gaps between them. “The joint goal for us all is investment that is positive for the community,” commented Sage-Martinson. “Each sector brings imperfect information from its point of view to that joint goal.” The lively conversation that followed ranged from efforts to build trust—often by sharing information more broadly—to efforts to understand the value that all partners bring to a partnership as well as to help investors understand the value of social returns, and efforts to understand the risks being taken and the potential rewards to be gained by each partner.

Building Trust. Mueller compared the relationship among partners to that of a marriage, in which “you have to show enough of yourself to achieve mutual trust, knowing that if you expose a weakness, the person on the other side of the table has to recognize that exploiting that weakness just might kill you, and that isn’t the preferred option.” ULI senior fellow and ULI/J. Ronald Terwilliger chair for housing John McIlwain concurred, commenting on the importance of openly airing disagreements and conflicts early on: “This is the way partnerships form. . . . If you don’t have a fight, you’re never going to know how your partnership is going to work down the road when it gets really tough.” Information sharing, argued McIlwain, is one way to build this trust.

He and others noted that community groups and governmental agencies must have the capacity to run their own numbers and pro formas, so they can compare them with those of their developer partners and others, and discuss and negotiate with them more effectively.

Recognizing Value. Kniech pointed out that all parties bring value to the table, in one way or another, and that each party must recognize this. Nonprofit organizations (including environmental groups), for example, often can be seen as independent, credible advocates for TOD features such as lower parking ratios and increased density and thus may help “get things done” even in the face of opposition.

Mueller and other participants commented on the failure of most institutional investors to recognize the value of social returns. Although some large public pension funds, such as California’s public employees’ and state teachers’ retirement systems (CalPERS and CalSTRS), do recognize that social equity in a community is one measure of return for their investment portfolios, the funds that do so are few and far between. Mueller called on participants to bring investors—as well as large retailers, the other group that he commented “just doesn’t get it”—into the conversation and help educate them about the values of equitable TOD, as well as about the importance of reconnecting capital and community.

Risks and Rewards. While some participants commented that the developer is the only partner taking major—and sometimes monumental—financial risks, others pointed out that all parties are taking risks and that, for

a TOD project to be truly equitable and successful, all must stand to gain. In other words, a win-win outcome must exist.

“I think it’s interesting that we talk about risk and return mainly from the developer side, and not necessarily from the public sector or the community side,” noted Sam Zimbabwe, director of the Center for TOD. “The community often has a lot to risk by allowing new investment, and that’s where the community benefits discussion often comes from: what are we willing to risk in order to allow or to benefit from the return of private investment in our community?” The public sector, he noted, may be risking future tax revenues for current return by using TIF. A transit agency may be risking future ridership by getting rid of parking spaces that it knows provide ridership, whereas a proposed housing unit is more of an unknown.

Several participants noted that foundations and other philanthropic groups can help remove the risk from projects by providing foundation guarantees, triaging the capital stack, and that community development financial institutions can take on subordinated debt to help the numbers for a project pencil out.

Kniech and other participants commented that the community advocate’s responsibilities include making sure that community members understand the developer’s role in the process. “We try to make sure they understand this is not just about huge profit margins; we spend time with our coalition explaining to them that if you promise a certain rate of return, you can’t just add something to the development that’s going to reduce that.” More community partners, she and others added, need more capacity to educate residents so they will understand the system through which development happens, what the tradeoffs are, what is realistic, and what is not.

Principles

After a networking lunch break, Brophy asked forum participants to think about what they saw as the fundamental principles needed to create and sustain successful cross-sector partnerships. After a brief, silent brainstorming session, participants broke into four smaller groups—each of which included a cross section of individuals from various sectors and regions—for lively, insightful discussions that were facilitated by Brophy, McIlwain, Zimbabwe, and Rutheiser.

Following these discussions, participants reconvened, and reporters from each of the breakout groups presented the principles that arose from their discussions. These principles—which are described in detail in the following section—include identifying and involving all stakeholders early on; laying a foundation with shared data; creating a shared vision, operating principles, and outcomes; establishing rules of engagement; clearly articulating each party’s role and responsibilities; communicating early, often, and effectively; keeping the process moving; addressing institutional and systemic barriers; being leaders and champions for equitable TOD; and celebrating successes and sharing results to promote more equitable TOD nationwide.

Looking to the Future

Many participants commented throughout the day about the importance of continuing the conversation among cross-sector partners. Rutheiser closed the day by expressing his hope that the forum stimulate the development of a community of practice that, in turn, sustains the conversation and reaches out to other communities that are beginning to think about implementing TOD in ways that are beneficial to all.

Ten Principles for Successful Cross-Sector Partnerships for Equitable TOD

Participants in the forum reflected briefly on their own about what it takes to create and sustain successful cross-sector partnerships for equitable TOD. Participants then broke into small groups, each made up of a cross-section of participants from different regions and sectors, and spent several hours in break-out groups formulating principles. These small groups, facilitated by a leader, then reported back to the larger group. Common principles for successful collaboration on equitable TOD are reviewed below.

- 1** **Begin by Identifying and Involving All Stakeholders**
- 2** **Lay a Foundation with Facts**
- 3** **Create a Shared Vision, Operating Principles, and Outcomes**
- 4** **Establish Roles and Rules of Engagement**
- 5** **Communicate Early, Often, and Effectively**
- 6** **Keep Moving**
- 7** **Address Institutional and Systemic Barriers**
- 8** **Be Leaders and Champions**
- 9** **Hold Dearly, but Lightly, to the Intangibles**
- 10** **Celebrate Successes and Share Results**

1 Begin by Identifying and Involving All Stakeholders

Many different types of processes can be used to create partnerships. Cross-sector partnerships often find their roots in earlier partnerships within governmental, business, neighborhood, philanthropic, and other individual sectors. How and when these intrasector partnerships decide to work together, across diverse sectors, varies from city to city and region to region, but one important founding principle is that, to successfully promote equitable TOD, they must—early on—reach out to everyone who may be affected by and involved in that TOD. Who does this “identifying” and “reaching out” varies from one partnership to another.

Defining “everyone” is a challenging process; all parties view different groups and individuals as stakeholders. From the standpoint of equitable TOD, these stakeholders must include the public sector (usually multiple governments—including elected officials—municipal planning organizations, transit agencies, and so forth); the private sector (developers, business groups, and so on); the community (neighborhood organizations and individual residents, community development corporations, and other advocacy groups); and perhaps others. Two groups that often are missing from such partnerships—but should be included whenever possible because they can have tremendous influence in how, where, and what type of development takes place—are institutional investors and large retailers. Partnerships also typically include representatives of the philanthropic sector, who often provide much of the funding that makes such partnerships possible.

The “geography” of stakeholders should not be too tightly or too loosely defined; although those who live or work immediately adjacent to a proposed transit line or TOD project clearly will be affected by it, so will the broader community and region.

Some constituencies are easier to reach than others; government and business leaders generally are familiar with partnership processes and may be comfortable working together to reach shared goals. Identifying who speaks on behalf of the community can be particularly challenging: Are those with the loudest voices the only ones who will be heard? What about those who rarely speak at all? Residents of ethnically diverse or low-income communities may be suspicious of “official” processes or have little or no experience working with other residents, let alone representatives of other sectors, to make positive changes in their communities. Those attempting to reach out to these constituencies need to find creative ways to do so.

In Seattle, for example, where—as in many cities—those who came to planning meetings tended to be white homeowners, the city planning department decided to reach out to members of three very diverse station areas in the southeast part of the city by hiring community residents as planning outreach liaisons. The 14 planning outreach liaisons hired in these areas represented the young and the elderly, African Americans, and the disabled and were able to speak with residents in their native languages. Planning staff held meetings in the community—rather than expecting residents to come to them—and provided simultaneous translation services at those meetings.

All of these stakeholders must be involved—from the partnership’s very beginning—in ways that give them an authentic voice in the process. Partnerships must acknowledge and respect diverse interests while remaining mindful of power dynamics; not every member of a partnership is on equal footing. Recognizing and being respectful of existing power dynamics is a healthy way to start the partnership conversation. Different

voices will carry different weight at different times, and how and when those voices are heard is a process that must be negotiated and worked out among partners.

Partnerships also must recognize that different sectors, organizations, and individuals bring different perspectives, resources, strengths, and skills to the table. They must recognize, for example, that a transit agency's primary mission is to build and operate a transit system, not to ensure that a community has enough affordable housing. Successful partnerships find ways to respect each party's perspectives and use each party's strengths and resources to the best advantage of all. They must also work to address critical capacity gaps—in skills and personnel—that affect the ability of each member of the partnership to be successful in its own tasks.

2 Lay a Foundation with Facts

Although different members of a partnership typically bring different sources of information (on elements such as job projections, traffic counts, numbers of affordable-housing units, and so forth) to the table, a neutral source for those “facts”—or at least a source that all partners trust—will help lay a foundation of neutral data as the basis for discussions. Put bluntly, everyone is entitled to his or her own opinion—but not to his or her own facts. Good data will help create transparency and accountability.

A new partnership should begin with a shared learning agenda, so that members from different sectors can learn about and discuss issues, both within their own sectors and across sectors, at the same time and in ways that help them understand each others' perspectives. Beginning this learning process with good, trusted data creates transparency and helps the partnership—and individual partners—make good decisions and be accountable to one another and the broader community.

In addition to agreeing on data and data sources, partners should identify the benefits of equitable TOD using terminology that everyone can understand. Planning and governmental jargon and acronyms should be avoided as much as possible; use words and phrases like “walkable, affordable communities,” “better mobility,” “access to jobs,” and so forth to identify the benefits of TOD, rather than “compact,” “high density,” and “value added.” Partners should discuss the definitions of these words and phrases—what, for example, do we mean by “equitable TOD”?—and ensure that common agreement exists about these meanings upfront.

Partnerships involving residents with limited education or business experience will benefit from working together to educate those individuals and, eventually, the broader community, about transit, TOD, and other issues. In both Atlanta and Seattle, civic and community development leadership institutes are helping bring groups of residents up to speed on transit, TOD, and economic development issues to enable them to fully engage in ensuring the light rail that is coming through their communities will benefit them and help preserve those communities. In addition to educating residents, these types of programs help build bridges within and among diverse communities—as well as between residents and other partners.

The foundation of facts also should spell out the risks being taken and the returns expected by each party. Community groups should not assume that developers are making huge profits without taking huge risks;

likewise, developers should not be expected to understand what risks the community is taking with TOD—or what benefits community members hope to achieve. These “facts” also need to be discussed upfront, in clear and specific terms. Understanding each others’ interests and goals helps partners recognize where they are aligned and where they diverge—and enables them to better understand each others’ perspectives and actions. Whenever possible, objective intermediaries should be used as “honest brokers” to help facilitate conversations and set the table for neutral dialogue among partners.

3 Create a Shared Vision, Operating Principles, and Outcomes

This process starts with identifying each party’s expectations for the results of the partnership upfront. Partners need to be clear about these expectations, as well as flexible. They should not compromise on critical principles, but all parties must make sure the focus remains on getting things done; they must make clear that the goal of the partnership is to help all partners achieve their legitimate interests, but that not everybody is going to get everything they want. In other words, be realistic!

Articulating a shared vision, operating principles, and outcomes must be a collaborative and cooperative process. It will take a significant amount of time, but this will be time well spent, because the process will enable partners to become comfortable working with one another and thus help the rest of the partnership process proceed more smoothly.

A shared vision for the public realm is particularly important but is often overlooked in the planning process. Although private developers are clearly responsible for buildings, the spaces between buildings are a critical element in the success or failure of any TOD project. Establishing a process for thinking about the public realm is also a way to get nontraditional parties involved in the partnership process. Community members may not be interested in—or able to understand—many of the technical details of a TOD project, but they can come together to define, plan, and support some of the project’s public-facing elements, such as a mural, a water feature, or open space.

The vision should clearly articulate the benefits of equitable TOD in ways that everyone can understand: will it mean a more walkable community, one in which affordable housing is preserved, increased economic development opportunities, new mixed-use projects with mixed-income housing, or something else?

Operating principles must be clear but flexible enough that they can be adapted for use in a variety of situations and geographic areas.

Partners must collectively define and agree upon the partnership’s vision, operating principles, and goals—and they must be specific in translating those principles into terms that all partners understand.

4 Establish Roles and Rules of Engagement

Establishing the roles of all partners and the rules by which they will work together is another important step to take early in the partnership process. Different parties will play different roles; partnerships should examine the strengths of each partner and use each one to its highest and fullest potential. Each party’s role

and responsibilities should be clearly articulated in ways that ensure everyone contributes to the process. Partners must recognize that “what you give is what you get.” Their roles should be defined in ways that take into account both short-term and long-term accountability; all partners should understand who is being held responsible for success in transit and equitable TOD.

Defining any leadership roles upfront is also important. How will the partnership be organized—as a web of loosely interconnected entities, a strict hierarchy, or something in between? Will it have a leadership committee or council? Different structures can be effective in different places, but determining early on how the partnership will function and who—if anyone—will take on leadership roles is important.

As these roles are defined, all parties also must recognize that the individuals involved in the partnership process will change over time; new government officials will be elected, transit and other agency personnel will transfer into or out of agencies, and residents will move away and be replaced by others. Roles should not be defined so narrowly that only specific individuals can fulfill them, and may need to be redefined as different players—both groups and individuals—join or leave the partnership.

Creating a set of nested or overlapping partnerships within a larger mega-partnership may be necessary to plan and implement complicated TOD projects and processes. Partnerships will be needed at multiple levels; the relationships within them may be horizontal or vertical or a mix of both.

Likewise, establishing rules of engagement is an essential step in the partnership process, one that will build and maintain trust that, in turn, will help keep the partnership alive and viable through difficult discussions and negotiations. For example, the participants might agree on a “no ambush” rule in which all parties agree that before any disagreement or opposition is expressed in a public forum, the opposition will be conveyed privately to the partners. “Harry, we can’t seem to find a place of agreement on this point; I want you to know ahead of time that we will publicly oppose you on this point before City Council next week. We agree on so many other matters, and we’ve been working well together, and we do not want to let our public position on this point get in the way of future progress.”

Successful partnerships will at times involve principled disagreement; partners must “agree to disagree” about various issues while also agreeing to continue to work together. Partners must agree not to ambush each other; honesty and transparency are vital elements in creating a safe and trusting environment for discussions and civil discourse. Yet confidentiality also is vital at certain points in the process.

5 Communicate Early, Often, and Effectively

Each sector in a multisector partnership has its own jargon, acronyms, and language in which various terms and phrases are commonly understood to have a particular meaning, which can make communications among sectors difficult. One obvious example is the words *equity* and *equitable*, which have very different meanings for different people. Does equitable investment mean spending the same amount of money in both poor and wealthy neighborhoods, or does it mean investing more money in the communities that need it most? How do race and class factor into the meaning of equitable? Should equitable development aim to right the wrongs of the past? What is equitable often is in the eye of the beholder; sometimes it will be de-

terminated on a case-by-case basis, but agreeing on some basic definitions upfront will help the partnership move forward.

Those involved in cross-sector partnerships thus must figure out how to communicate and understand each other.

Once partners have learned how to communicate with one another, they must set up a framework for doing so on a regular basis, in ways that provide feedback to one another and keep all parties informed with consistent and ongoing communication. This communication must be a sustained, two- (or three-, or four, . . .) way process. Partners also should recognize that stakeholders sometimes can speak for each other in ways that are more powerful than if they were speaking for themselves. When advocates speak on behalf of a project, it can have far more influence than when a developer is arguing for the project.

Consistent and ongoing communications must reach beyond the partnership itself; the partnership must keep the larger community informed about its progress. The Seattle Housing Authority, for example, distributes a monthly newspaper to residents of low-income public housing and housing for seniors, as well as to local legislators and public officials. Much of the newsletter is written by residents, and it has been a useful tool with which to report to them, from their own perspective, on equitable TOD progress and outcomes.

6 Keep Moving

Partnerships are effective only if they keep moving along the pathway from vision to goals to strategies to implementation, with increasing clarity about each partner's role developing along the way. Partners must figure out how to move from setting goals to creating strategies that make implementing those goals possible.

"Process" can become a burden; it can be used as a way to avoid change rather than to implement it. Process can become a tactic for excluding people from active, meaningful participation, for wearing people down through too much talk, red tape, and bureaucracy. Partnerships must avoid getting bogged down in process—or allowing one or more partners to wear the others down. But process can be a useful, constructive, and effective tool, a trust-building mechanism that enables participants to collaborate and move toward real change. Each partnership must find its own "process sweet spot"—the time at which all (or most) parties recognize that they have engaged in enough, but not too much, process.

Then the partnership needs to move on to implementation, achieving the desired outcomes, and investing in and building real projects.

7 Address Institutional and Systemic Barriers

Partnerships face—and must address and overcome—a wide range of barriers. These include the capital market's expectations and restrictions, legal or governmental restrictions and limitations, and the like.

Examples of systemic barriers include the state of Washington's lack of a mechanism for TIF, which has required the city of Seattle to use zoning—an extremely blunt tool for this purpose—to meet some of the city's land use objectives. Another example is a state law in Colorado that restricts the RTD's ability to catalyze equitable TOD with its land holdings.

Successful partnerships recognize and identify these barriers and figure out creative ways to get around or over them.

8 Be Leaders and Champions

No change ever happens without a champion. A cross-sector partnership can be, or provide, that champion. Different parties may emerge from within a partnership to champion different efforts. (Government can sometimes be the least reliable partner, because government leaders and priorities change so frequently.)

Leadership is critical in moving partnerships forward; all successful partnerships have strong, effective leaders. Yet a partnership must not rely totally on one or two individuals. Partnerships should institutionalize each organization's commitments (see principle 4) in ways that ensure the partnership's long-term survival and leadership even as personalities change.

9 Hold Dearly, but Lightly, to the Intangibles

Partnerships must recognize that people feel passionately about their communities, even if they are not always able to articulate those feelings. Those planning for equitable TOD in diverse communities should pay special attention to the cultural effects of any proposed development. Partners should acknowledge both the negative and positive potential impacts of TOD, particularly those that may not be quantifiable.

Some displacement, for example, may be unavoidable, but if partners acknowledge this possibility upfront and handle it honestly and sensitively, community members are more likely to understand and accept it. When a light-rail line opens, bus services may be cut back, resulting in reduced rather than improved mobility for some people; partners should acknowledge this possibility and work to improve all forms of transit service for those who need it most. By its very nature, TOD can change substantially the structure of the community; partners need to explore what may be subtle ways of maximizing the positive effects of that change and minimizing negative ones. Partners should discuss and address these types of issues early and often in the planning and development processes, and be upfront and honest about how they may affect the community.

10 Celebrate Successes and Share Results

Partnerships must share information about what works—and, just as important, what does not—in equitable TOD by sharing their results as broadly as possible. Only through shared knowledge can individuals, partnerships, and other groups learn how to work together to best implement equitable TOD projects. ULI recognizes this in its mission statement, which states that the Institute is committed to “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.”

Cross-sector partnerships to promote equitable TOD are a relatively new phenomenon; they are still learning what works well and what does not, and their experiences will inform future partnerships as they evolve and spread throughout the nation.

The work of forming and maintaining cross-sectoral partnerships is very difficult. After all the hard work of partnering, celebrating successes helps justify and validate that effort. It can enable all parties to feel good about the process—and make it possible for them to commit to continuing the partnership process in pursuit of future successes. So, when milestones are met, when projects resulting from the partnerships occur, the partners need to celebrate their successes, not only because celebrations are good in and of themselves, but also because the celebration typically has the effect of strengthening the partnership so it can move on to additional work. In addition, it can be an object lesson for others who are engaged in partnerships in other settings.

Case Studies

This section provides case studies of each of the four corridors discussed in the forum, including Denver's West Corridor, Seattle's Central Link, Minneapolis–St. Paul's Central Corridor, and Atlanta's BeltLine. For each, information on current status, demographics, costs and funding opens the section, followed by a review of partnership strategies for affordable housing and employment, and finally a discussion of features and observations that are unique to each place.

Denver West Corridor

The 12-mile (19-km) West Corridor is a 12-station light-rail line providing access to Union Station, the region's multimodal hub in lower downtown Denver, from the Denver Federal Center in the city of Lakewood, to the Jefferson County seat in the city of Golden, and to neighborhoods on Denver's west side and in northern Lakewood. It will be part of FasTracks, a new regional transit system that will include 122 miles (196 km) of new commuter and light rail and 18 miles (29 km) of bus rapid transit, as well as 21,000 parking spaces. Early construction on the West Corridor began in 2007, with full construction beginning in 2009. The West Corridor is expected to open in 2013. The Regional Transportation District is building and will operate the West Corridor and the FasTracks system.

Overview

Demographics. The west side of Denver is one of the region's most diverse areas and has an abundance of affordable, market-rate rental-housing options. The West Corridor is home to working-class and lower-income communities, including immigrant Latino residents.

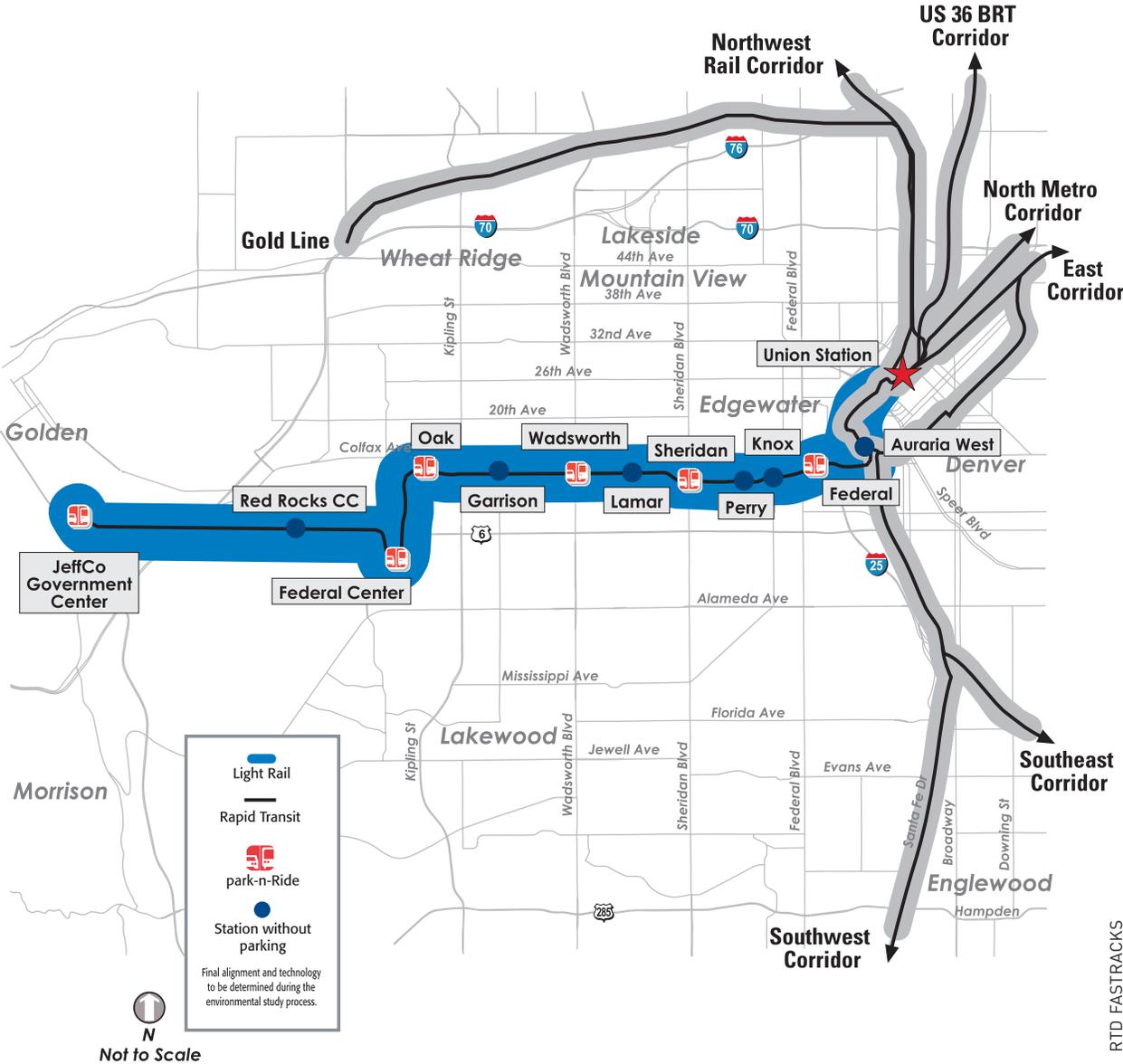
West Corridor residents earn less than the regional average; the regional annual median income for the seven-county Denver region was \$52,000 in 2000, whereas the annual median income of all West Corridor station areas averaged about \$35,355, but ranged significantly along the corridor. The West Corridor is home to a diverse mix of renters and owners; 63 percent of all households along the West Corridor rent rather than own, about twice the rate of the region. About 42 percent of West Corridor residents are white, while 49 percent identify themselves as Hispanic or Latino. About 4 percent of all residents along the corridor are African American.

Costs and Funding. In 2004, Denver-area voters approved a sales tax referendum to fund the FasTracks system. The FasTracks program is estimated to cost \$6.7 billion at buildout. The West Corridor line will cost an estimated \$710 million. Funding for the line has come through a mix of federal and local funds, with approximately \$392 million from local sources and \$318 million from federal funding. Of the federal funding, \$309 million was provided through a federal New Starts grant and \$10 million through other federal sources.

Partnerships

As the Denver region's transportation agency, the West Corridor's builder, the RTD, has a board of directors, each member of which represents one of 15 districts. The RTD and the Denver Regional Council of Governments have partnered with local jurisdictions to help implement TOD along the existing and planned transit system.

Denver West Corridor Map



To communicate with the public during the design process, to ensure that the corridor would grow in a manner beneficial to the existing community, and to meet National Environmental Policy Act requirements, the RTD facilitated public involvement through an urban design committee, public meetings, and small group meetings. Partnerships among public and private entities were formed, as described below, to foster affordable housing and job creation in West Corridor communities.

Affordable Housing

As of 2009, 1,424 affordable homes existed within a half-mile (0.8-km) radius of the West Corridor light-rail line. Predictions are that by 2030 the West Corridor will add approximately 15,000 homes, opening a win-

dow of opportunity to create more affordable housing in the region. For example, MGL Partners, a private developer, built a 63-unit affordable apartment complex, the Villas at Sloan's Lake, within one block of West Corridor transit access. The development achieved 95 percent occupancy within eight weeks of completion.

The nonprofit and foundation sectors also have been involved in the affordable-housing effort. They have worked to create a \$15 million TOD Fund, with support from national and local foundations—including a \$2.25 million grant from the MacArthur Foundation. The TOD Fund will purchase and hold key parcels within a half-mile of rail stations to ensure the availability of land for the development of affordable housing and preserve or create 1,200 units of affordable housing for sale or rent along Denver's transit corridors. The fund is a partnership of the participating foundations, as well as the city and county of Denver, Enterprise Community Partners, the Urban Land Conservancy, and other organizations. The loan structure will be managed by Enterprise, while the Urban Land Conservancy will acquire and control assets for public and charitable purposes and partner with vertical developers.

The Jody Apartments, a 62-unit apartment complex near the Sheridan Station on the West Corridor, is an example of the type of projects undertaken by the TOD Fund. This complex was acquired by the fund and will be preserved as affordable housing until it is redeveloped into a higher-density mixed-use, mixed-income project. The partnership behind the Jody conversion includes the city of Denver, Enterprise, and the Urban Land Conservancy, as well as the Colorado State Division of Housing and NEWSED Community Development Corporation, a local nonprofit group, as the development partner.

At the community level, a redevelopment plan for Sun Valley has been prepared as part of the station-area planning around Federal/Decatur Station. Partners in the redevelopment of Sun Valley include governmental entities such as the Denver Housing Authority and the city and county of Denver, as well as the nonprofit Annie E. Casey Foundation and Making Connections Denver.

The Lakewood Housing Authority has purchased 15 acres (37 ha) of land adjacent to West Corridor stations to ensure the availability of affordable housing and has been working on this effort with the city and county of Denver. The city of Lakewood also has been acquiring land surrounding West Corridor stations to support community development in Lakewood and ensure affordable housing is available to residents. Lakewood has rezoned and remapped the land surrounding several West Corridor stations in support of TOD.

In September 2010, the RTD adopted a revised TOD policy that incorporates a new, more focused policy on mixed-income housing. This policy outlines a process whereby the RTD will work with local jurisdictions to evaluate affordable-housing opportunities on land it owns. The city of Denver recently purchased from the RTD 2.5 acres (6.2 ha) next to the 10th and Osage Station for affordable housing.

Employment

The local nonprofit FRESC (formerly the Front Range Economic Strategy Center) has been active in launching a community benefits campaign, the West Alliance. As a supporter of TOD, the West Alliance looks to the development of the West Corridor to create economic opportunities for residents. The intent is to provide jobs, training and education, entrepreneurship opportunities, and stable business ownership for community

members. FRESC is joined in this effort by Metro Organizations for the People, Making Connections Denver, Project Wise, and the National Civic League, all of which are community partners in the West Alliance.

Features and Challenges

The Denver region is expected to experience strong population and economic growth in coming years. The FasTracks project has the potential to channel that growth in transit-oriented ways. However, some challenges remain. Local authorities, businesses, and residents are making land use decisions that correspond to the predicted development, with land surrounding the West Corridor being upzoned for a mix of uses. As a result, a large amount of price speculation has surrounded land values along the West Corridor, which has resulted in unrealistic asking prices for real estate.

Additionally, despite strong station-area planning, corridor-wide collaboration over some matters has been difficult. Affordable housing has been one of the key challenges. At the corridor level, jurisdictions have been wary of accepting a disproportionate share of affordable housing. The city's west side is already one of the more affordable housing areas in the Denver metropolitan region, with an abundance of affordable market rentals. The challenge will be to preserve this affordable-housing stock in the face of the transit expansion. The proactive land-acquisition strategies designed to create more affordable housing along the West Corridor have themselves caused concern that this part of the region will not offer an adequate amount of mixed-income housing, which could hinder the area's economic development potential.

The local tax structure also has proved problematic for housing. Local governments in the region rely heavily on sales taxes for their revenue base and generally desire large amounts of retail—rather than residential—uses in new development.

Seattle Central Link

Seattle's first light-rail transit line, the Central Link—part of the Link light-rail system—became operational in July 2009. The Central Link route connects Seattle's central business district to surrounding neighborhoods to the south; future connections will lead north and east. Specifically, the Central Link route runs along Martin Luther King, Jr., Way (MLK), providing transit access in some of Seattle's poorest and most ethnically diverse neighborhoods, including Rainier Valley. The area along MLK is characterized as predominantly auto-oriented retail uses, with an eclectic mix of housing types and vacant property on small lots.

The Sound Transit 2 (ST2) Plan incorporates additional extensions to the Link network. Upon completion of ST2 in 2030, the Central Link will be a part of the 53-mile (85-km) Link light-rail system. Sound Transit is building and operating the system.

Overview

Demographics. Equity issues are important to the Central Corridor. The line runs through diverse, mixed-income communities with multicultural experiences and businesses that nevertheless are experiencing challenges, including limited access to capital and jobs paying a living wage. The corridor areas are also home to a disproportionately high number of renters. In particular, Rainier Valley has many transit-dependent immigrant

communities, as well as a historically disadvantaged African American community facing high unemployment and barriers to entering the workforce. In addition, the International District, which has a station, is home to Asian immigrant populations that are primarily low-income seniors. Tukwila and SeaTac, both with stations south of Seattle, have many low-income residents, people of color, and renters.

Costs and Funding. In December 2009, the corridor was extended to include a connection to the Seattle-Tacoma International Airport, making the route a total of 15.6 miles (25.1 km) with 13 stations. The cost to construct the Central and Airport Link was \$2.6 billion, of which \$500 million was financed through federal New Starts funding. The remainder was funded through a variety of local sales and use taxes, motor vehicle excise taxes, bonds, and other federal funding.

Partnerships

The Link system required the development of regional relationships among separate government entities. These regional relationships allowed coordinated transit-policy decisions and actions. At a regional level, the Puget Sound Regional Council was responsible for making overarching decisions related to transportation and land use for four central Puget Sound counties (King, Pierce, Snohomish, and Kitsap) consistent with state and city policies to promote economic growth and support the viability of light rail.

At the city level, the city of Seattle is responsible for developing policy that encourages transit use and complementary land uses within the city. To implement Seattle’s Comprehensive Plan, 38 neighborhood plans were developed and adopted in the late 1990s. Immediately following that process, the city, in partnership with Sound Transit, conducted an extensive station-area planning exercise. Since that time, the city in general, and the southeast Seattle neighborhoods in particular, have grown and changed, and the light-rail system is up and running.

Seattle Central Link Map



A neighborhood plan update process was started in three station areas in 2009, using a very different model of public engagement to reach traditionally underrepresented populations. The city council recently approved Neighborhood Action Plans for Othello, North Beacon Hill, and North Rainier, and the city is working with community teams on implementation. Work is also starting on the plan update process in the Rainier Beach station area. The goals for these plans were divided into two major categories: “creating choices for living, working, and playing,” and “shaping a transit-oriented town center.”

The original station-area planning process in the late 1990s resulted in a very limited amount of upzoning. At the time, neighborhoods were still challenging the concept of surface light rail, which they expected to disrupt their fragile neighborhoods. Today, light rail is a reality, and each community is looking for ways to create a true town center—a safe and secure “people place.” Increased densities and heights are not a given in these communities, but people are starting to recognize the advantages that could come with such development.

The city has amended other zoning regulations for station areas, such as prohibiting drive-in businesses, eliminating parking requirements, and increasing the State Environmental Policy Act threshold, all with an eye to encouraging pedestrian-friendly development in station areas. The city is continuing to review zoned heights and development capacity to help create the desired amenities and densities to encourage ridership and leverage the significant transportation investment.

Sound Transit operates the Link light rail and is responsible for the integration of Sound Transit Regional Express buses, Sounder commuter rail, and light rail for the regional high-capacity transit network. Sound Transit’s long-range plan calls for combined rail and express bus systems to link urban growth centers to suburban communities. To achieve a transit network of this magnitude, Sound Transit has developed relationships with other public transit agencies that provide community and local bus service. Sound Transit also has used regional relationships, partnering with the city of Seattle to fund the undergrounding of electric utilities in Rainier Valley.

Seattle recently was awarded nearly \$5 million under HUD’s Sustainable Communities Regional Planning Grant Program. This effort, coordinated by Puget Sound Regional Council and involving a variety of stakeholders, will support activities focused on fostering vibrant transit corridors and addressing equity concerns, including housing and employment. The program will improve the region’s capacity to foster compact, equitable development, while providing affordable housing, reduced transportation costs, better environmental outcomes, and access to jobs for low-income households and communities of color in areas receiving major transit and housing investments.

Affordable Housing

Various government agencies have been engaged in efforts to develop affordable housing near transit. Through its two HOPE VI developments at Rainier Vista and New Holly, both near transit stations, the Seattle Housing Authority and its partners have built or will build more than 2,500 housing units, including more than 1,000 affordable units, and expect to see another 500 units built on TOD sites that are on the market. The Seattle Housing Authority has additional TOD sites with capacity for another 500 units in the corridor.

In response to affordable-housing incentive programs offered by the city of Seattle, many for-profit private developers have proposed housing projects within a ten-minute walk of the Central Link corridor. Private developers receive the benefits of these programs if 10 to 20 percent of the units qualify as affordable housing. The specific percentage of units and targeted income brackets (very low, low, or medium) vary by program.

In the not-for-profit arena, SouthEast Effective Development, a community development corporation in southeast Seattle, has created partnerships and encouraged investments in housing, arts, and economic development projects near the Central Link. A mix of local, federal, and private sources has provided funding for these projects. SouthEast Effective Development also has partnered with other nonprofit groups to fund and develop affordable-housing projects adjacent to the Central Link.

The city is partnering with Artspace to build the Mt. Baker Lofts next to the Mount Baker light-rail station along Rainier Avenue South. The project will include 51 units, designed to meet the needs of artists and their families with modest annual incomes, as well as ground-floor commercial space and a large community room for exhibitions, performances, and rehearsals.

Southeast Seattle and Rainier Valley have seen very little market-rate housing built in the postwar years until the Seattle Housing Authority's (subsidized) mixed-income HOPE VI projects. The presence of light rail is starting to generate interest in the development of market-rate housing near stations. One market-rate project at Othello Station is scheduled for completion in the first quarter of 2011.

Employment

In an effort to mitigate the negative impacts on businesses along MLK during the construction of the Central Link, the Rainier Valley Community Development Fund (RVCDF) was established by Seattle's mayor, the Office of Economic Development, Sound Transit, and King County and Rainier Valley community leaders. To capitalize the fund, RVCDF received a \$50 million grant from Sound Transit and the city of Seattle. The purpose of the fund was to provide supplemental mitigation assistance during construction. The fund was used to assist businesses with rent increases, equipment replacement, tenant improvements, and operating costs that were necessary to maintain business operations or reestablish a business that was located on MLK. As a result, 85 percent of the businesses operating on MLK survived the construction of the Central Link.

In addition to providing funding for supplemental mitigation assistance, the RVCDF created a construction Pre-Apprenticeship Program. The Pre-Apprenticeship Program introduced eligible Rainier Valley residents to construction apprenticeship opportunities, with the goal of setting these residents on the path to journey-level construction careers. As of 2009, more than 140 local residents had obtained construction-related jobs through the program.

Features and Challenges

As Sound Transit's first constructed light-rail line, the Central Link's ability to channel and facilitate economic growth is strategically important as a benchmark for decisions related to ST2. In looking forward to the Link's route extension as a part of ST2, transit availability in areas of traffic congestion provides a potential time-saving incentive to users, but whether the area has a traffic congestion problem that is severe enough to change driving habits remains to be seen.

In addition, to preserve future development opportunities, the Central Link has been designed with limited surface and structured parking facilities. Some riders have complained about the lack of parking. To address these concerns and better use existing parking areas until they can be developed for other uses, the city is allowing parking on a limited, interim basis in some locations.

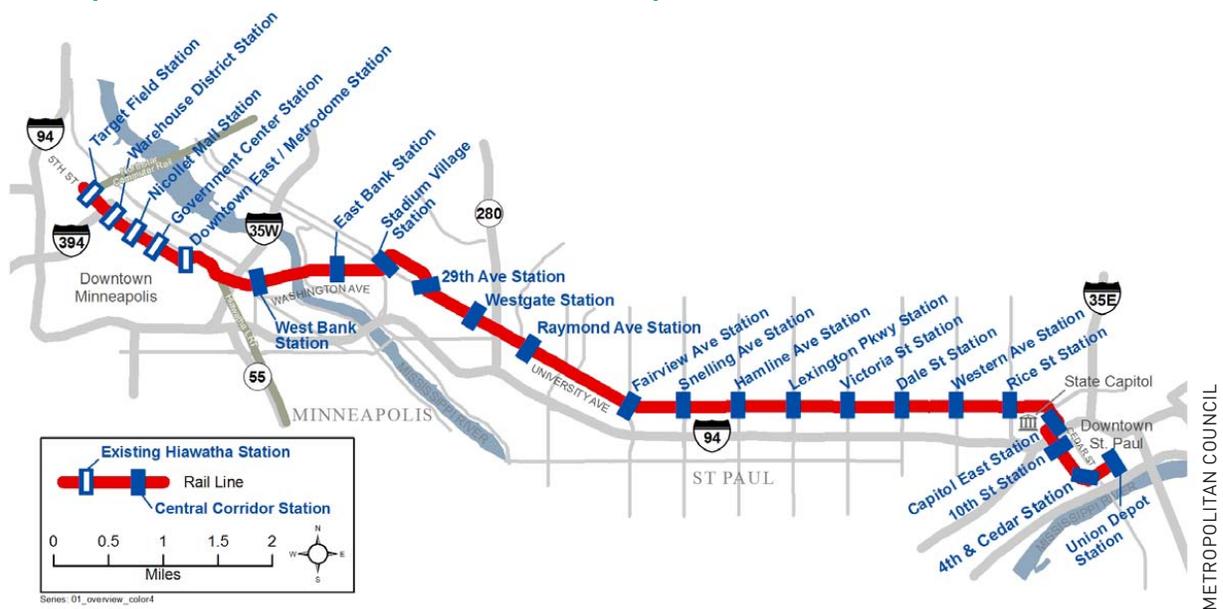
Development near the line also faces legal obstacles. The state of Washington’s constitution does not allow public funds to be used for “private benefit.” Historically, this provision has prevented the use of TIF, public development authorities, or similar tools to encourage private development in station areas. This situation is slowly starting to change, but it has been an impediment to development partnerships in the region. In addition, the inability to use TIF means that the city of Seattle relies heavily on upzoning to create incentives for things like affordable housing, but zoning is a blunt instrument at best.

Although many see light rail as an asset that can help revitalize the community, some see it as a threat as well, fearing that communities in the Rainier Valley will be displaced by market-rate development. Any equity strategy will need to address questions of how to ensure that existing residents benefit from the Central Link and that the Rainier Valley remains a diverse, mixed-income area, while at the same time fostering the economic diversity that will help create retail demand, jobs, and an improved quality of life—including better public schools—for the valley.

Minneapolis–St. Paul Central Corridor

The 11-mile (18-km) Central Corridor light-rail line will run through the heart of the Twin Cities region and connect five major economic centers—the downtowns of Minneapolis and St. Paul, the University of Minnesota, the Midway district, and the Minnesota State Capitol complex—that are home to 325,000 jobs. The backbone of the planned regional transit system, the Central Corridor Light Rail Transit (LRT) will provide a link to the region’s two existing rail-transit lines, Hiawatha LRT and Northstar commuter rail, when it opens in 2014.

Minneapolis–St. Paul Central Corridor Map



The Central Corridor LRT is in the final design phase and has received funding from the Federal Transit Administration. Early construction on the line began in 2010, with major construction scheduled to begin in the spring of 2011. It is being built and operated by the Twin Cities' seven-county governing body, the Metropolitan Council, through an operating division known as Metro Transit, which operates some of the region's other rail and bus transit services.

Overview

Demographics. The Central Corridor LRT includes 18 new stations in a dozen neighborhoods. Many of these neighborhoods are among the metropolitan area's most diverse and economically challenged. Central Corridor neighborhoods are home to 120,000 residents, 23 percent of whom live below the poverty line and 44 percent of whom are people of color. These communities include working-class residents and immigrant populations from Laos and Vietnam.

Costs and Funding. The proposed financing structure incorporates a mix of funding from the federal government, the Counties Transit Improvement Board, the state of Minnesota, and Ramsey and Hennepin counties. President Obama committed \$45 million to the Central Corridor LRT in his fiscal year 2011 budget. The total cost of the Central Corridor project is \$957 million.

Partnerships

The Central Corridor LRT is a key element in a regional transportation plan that will ensure the Twin Cities region sustains economic growth and vitality, maintains its regional and national competitiveness, and creates more livable communities for residents. A large number of organizations have been involved in the planning of the line and surrounding development, and several new organizations and partnerships have been formed to address the interests of corridor stakeholders.

The Metropolitan Council, which acts as the lead local sponsor, is the regional planning authority for the Twin Cities and will build and operate the Central Corridor line.

The Counties Transit Improvement Board was created in March 2008 when five metropolitan counties voted to levy a 0.25 percent sales tax dedicated to funding transit construction and operations. The board will provide major funding for the Central Corridor LRT.

The Central Corridor Partnership is a business-led coalition founded in 2004 to promote the Central Corridor and advocate for a fully integrated transportation system with a long-term regional funding source. The partnership aims to provide a voice for the St. Paul and Minneapolis business communities regarding the development of the Central Corridor LRT.

The Central Corridor Funders Collaborative was created in 2008 to leverage the investment in the Central Corridor LRT for the benefit of the people and places closest to the line, with a special emphasis on benefits for low-income residents and residents of color. The Funders Collaborative now has 12 members—including the Annie E. Casey, McKnight, and Saint Paul foundations—and focuses its work beyond the rail, seeking to provide access to affordable housing, build a strong local economy, create vibrant transit-oriented places, and encourage effective coordination and collaboration in the corridor. In pursuit of these goals, the Funders

Collaborative helps convene multisector working groups to build shared solutions and invests grant funds to support these strategies and their implementation.

In its work, the Funders Collaborative has supported the formation of several additional partnerships:

- The Central Corridor Business Resources Collaborative, a multisector group pursuing construction mitigation, business development, and long-term economic development;
- The TOD Investment Framework Working Group, a collaboration of six government agencies aiming to align and maximize public investments to attract private investment that will fulfill community-based plans;
- The Great Minds Retreat, a multisector gathering of more than 40 organizations seeking to boost construction workforce and DBE use; and
- The newly formed, multisector Central Corridor Affordable Housing Implementation Group.

The Energy Innovation Corridor is yet another multisector partnership involved in the corridor. Launched in 2008, it is a collaboration of 16 utilities, government agencies, businesses, nonprofit groups, and the Metropolitan Council to promote renewable energy, energy efficiency, electric transportation, and smart-energy technologies.

Affordable Housing

Affordable housing already exists in the neighborhoods along the Central Corridor, but the area is likely to experience increases in rents, home prices, and property taxes because of its proximity to transit. One of the Funders Collaborative's key goals is to ensure that affordable housing continues to exist in the Central Corridor after construction is complete. Therefore, the Funders Collaborative is working with the Local Initiatives Support Coalition to convene a multisector working group that will create a corridor-wide plan to preserve and expand affordable housing. The plan will seek opportunities to leverage expected Central Corridor development to provide a percentage of new affordable-housing units and to limit involuntary displacement by preserving the affordability of existing housing.

Employment

Businesses along the corridor have been concerned about economic effects from construction. The 13-member Business Resources Collaborative—which includes the Metropolitan Council, the cities of St. Paul and Minneapolis, the Central Corridor Partnership, five business associations and chambers of commerce, and several nonprofit service providers—launched a “Ready for Rail” campaign in summer 2010 to help businesses adapt to the changes in the marketplace expected as a result of the new light-rail line. The campaign includes construction information, free technical assistance for businesses, a parking mitigation plan and fund, a “buy local” marketing campaign, and a \$1.5 million, zero-interest loan program.

The Metropolitan Council's Office of Diversity and Equal Opportunity and the Minnesota Department of Human Rights have formed a Central Corridor Joint Committee on Equal Opportunity and DBEs. The Joint Committee has more than two dozen members representing the transit project owner (the Metropolitan Council), the enforcement agency (the Department of Human Rights), labor unions, contractor and minority contractor associations, nonprofit construction training programs, other government agencies, and advocacy organizations.

The Joint Committee was launched in 2007 and was the basis for the January 2010 Great Minds retreat. This multisector gathering produced a report listing five priorities for boosting participation of women and minorities in the construction workforce and four priorities for enhancing DBE use.

Features and Challenges

As communities surrounding the Central Corridor experience effects from light rail, corresponding opportunities also exist, including expanded access to services and jobs and decreased total housing-plus-transportation costs. These impacts and opportunities have been the focus of extensive community planning and engagement in the corridor. The city of St. Paul used broad outreach efforts to create the Central Corridor Development Strategy, a document that guides future land use and lays out equitable development goals. Community engagement continues, as the Metropolitan Council uses a multilingual outreach staff to communicate with residents about the project, a resident-led Community Agreements Coordinating Committee seeks to explore community agreements around issues of equity, and a community-based Health Impact Assessment is underway.

Despite all the efforts to involve the communities located along the Central Corridor in the development and building process, some residents remain skeptical. Their skepticism is partly based on displacement that took place in the wake of local transportation projects in the past. For example, when I-94 was built in the 1960s, the predominantly African American Rondo neighborhood, a thriving middle-class community just south of the Central Corridor, was bisected, and homes and businesses were removed. In January 2010, the NAACP (National Association for the Advancement of Colored People) and allied minority groups filed a federal lawsuit challenging the Central Corridor project's final Environmental Impact Statement and claiming that the line's location unfairly and disproportionately affects minority neighborhoods.

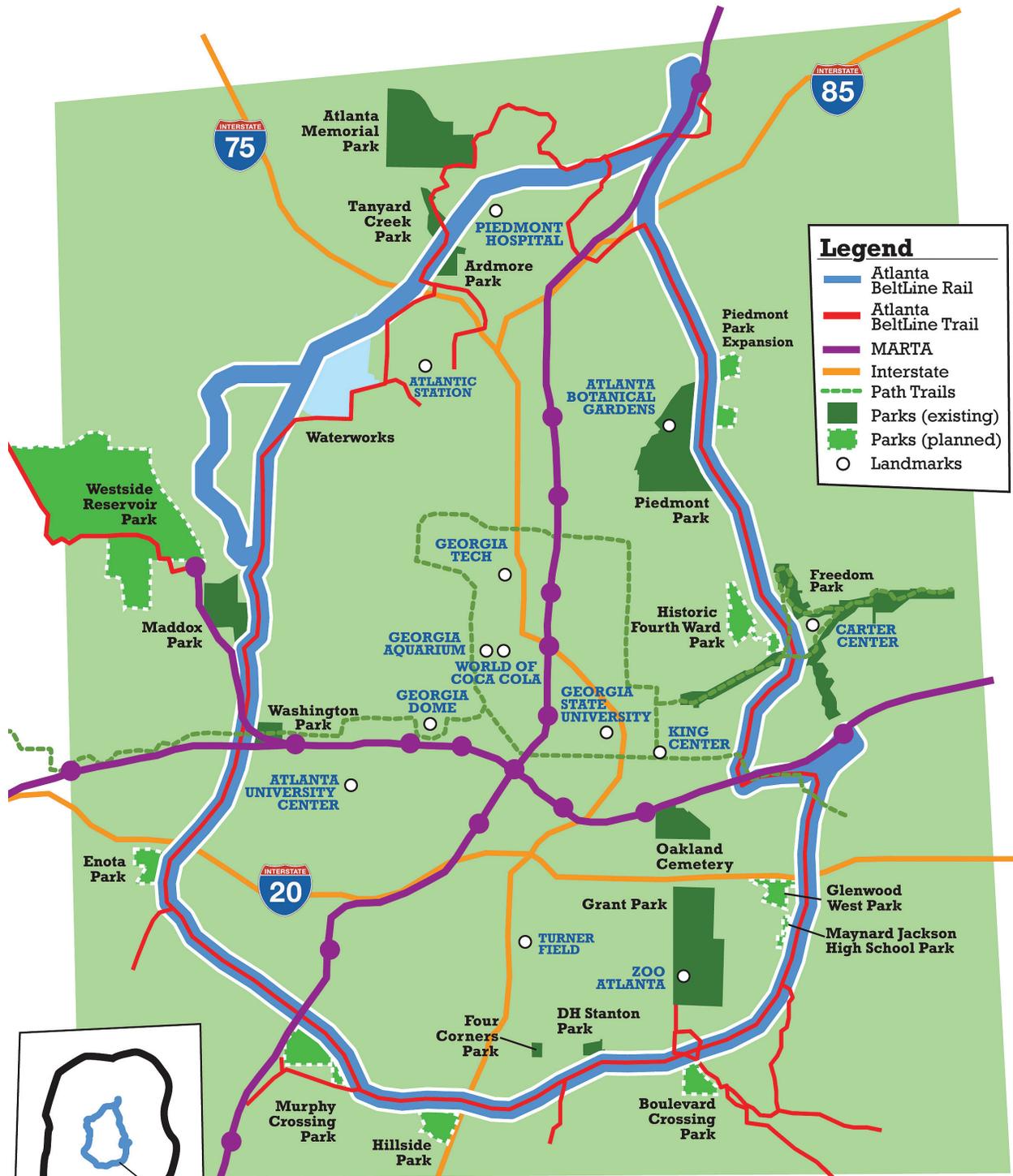
To address these concerns, the organizations involved in developing the Central Corridor line will need to maintain open communication with community representatives and advocates to ensure that the needs of the communities surrounding the Central Corridor are met.

Atlanta BeltLine

The planned Atlanta BeltLine will include 22 miles (35 km) of rail transit, a 33-mile (53-km) network of multiuse trails, and 1,300 acres (526 ha) of new parks and green space. The Atlanta BeltLine will circle the urban core of downtown Atlanta and connect to 45 surrounding neighborhoods. The Atlanta BeltLine transit system also will connect to existing MARTA service in up to five locations.

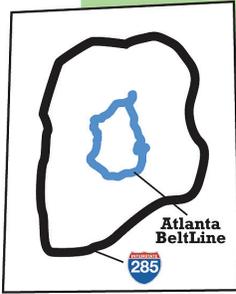
Before beginning construction, the Atlanta BeltLine project must complete preliminary engineering and a final design phase. As of early 2011, the Environmental Impact Statement is underway for the first leg of the rail system. Right-of-way acquisition and transit planning for the remaining legs of the transit system also are underway. Construction of the first leg of usable transit is expected to begin in the next few years, depending on the type of funds secured. If federal funds are used, the first leg is unlikely to be complete before 2015. If local funds are secured, the date of initial operations is expected to be earlier.

Atlanta BeltLine Map



Legend

- Atlanta BeltLine Rail
- Atlanta BeltLine Trail
- MARTA
- Interstate
- Path Trails
- Parks (existing)
- Parks (planned)
- Landmarks



ATLANTA BELTLINE, INC.

Overview

Demographics. Some 97,000 people live in the area covered by the BeltLine, in about 61,000 housing units. Median household income was \$47,500 in 2009, and per capita income was \$32,000. Of the total housing units, about 54 percent are renter occupied, 30 percent are owner occupied, and 16 percent are vacant.

Costs and Funding. The estimated cost of the Atlanta BeltLine is \$2.8 billion. The proposed financing structure is a mix of public and private funding. The majority of the project will receive funding through TAD or TIF. The Atlanta BeltLine TAD was created by the Atlanta City Council in 2005. The remaining portion of the project will receive funding from federal, state, and local governments, as well as from private donors. In 2007, the ABLP began a \$60 million capital campaign for private charitable dollars to fund green space acquisition and trail construction. To date, the campaign has raised \$35 million from more than 50 donors, with lead gifts from many of Atlanta's largest foundations and corporations.

Partnerships

In addition to the ADA—the economic development arm of the city of Atlanta—the two main entities involved in the development of the Atlanta BeltLine are the ABLP and ABI. In 2005, then-mayor Shirley Franklin established the ABLP to support ADA's efforts in the Atlanta BeltLine project. The ABLP is a nonprofit organization that generates community support, raises funds from private and philanthropic sources, and solicits pro bono and volunteer support for the Atlanta BeltLine project. It serves as the catalyst to mobilize resources to address the social concerns raised by the new developments around the Atlanta BeltLine. Accordingly, the composition of the ABLP's board includes leaders from the business, neighborhood, and faith communities citywide to adequately represent the diverse audience with interests in the Atlanta BeltLine project.

In 2006, ADA established ABI to coordinate and execute the city of Atlanta's 25-year Atlanta BeltLine initiative. Specifically, ABI is tasked to plan and build the BeltLine. ABI's key functions are defining the Atlanta BeltLine plan; leading efforts to secure federal, state, and local funding; continuing the Atlanta BeltLine community engagement process; and serving as the overall project manager for the Atlanta BeltLine plan. ABI also is responsible for communicating Atlanta BeltLine progress to the Atlanta City Council, the Atlanta Board of Education, and the Fulton County Board of Commissioners, the government bodies that consented to participate in the Atlanta BeltLine TAD. Other partners playing a key role in the development of the BeltLine are the PATH Foundation, the Trust for Public Land, MARTA, numerous city departments, and many private, public, and nonprofit organizations.

ABI and the TAD Advisory Committee approved an Equitable Development Plan in 2009. The plan's principles are based on general principles put forward by PolicyLink and include integration of people and place strategies; reduction of local and regional disparities; consideration of a triple bottom line (economic, environmental, and social); and inclusion of a meaningful community voice, participation, leadership, and ownership.

Affordable Housing

Each Atlanta BeltLine TAD bond issuance must set aside 15 percent of net proceeds toward a BeltLine Affordable Housing Trust Fund. The Atlanta City Council has established the goal of creating 5,600 units of affordable housing over 25 years, with an estimated \$240 million from the trust fund. ABI drives policy

and ensures the success of the overall program in coordination with other implementation and community engagement components. The ADA implements and administers the trust fund, including evaluating and deciding which projects will be funded. Policies for the trust fund were established and approved in 2008. According to these policies, 20 percent of the projects financed by the BeltLine Affordable Housing Trust Fund will be developed through community housing development organizations based in the Atlanta area.

The Atlanta Land Trust Collaborative was also established to maintain affordability in neighborhoods at risk of gentrification and displacement through the creation of community land trusts.

The Atlanta City Council also established the BeltLine Affordable Housing Advisory Board, which provides advice related to affordable-housing policy and tracks the availability and location of affordable housing. The board is composed of local housing experts and residents representing a broad range of local affordable-housing interests.

Employment

The Atlanta City Council established a “community benefits” provision in the 2005 TAD enabling legislation. One portion of the community benefits provision is a first-source job policy to provide job training to local residents where developments and infrastructure for the Atlanta BeltLine occur. A developer seeking to receive TAD funds therefore must provide benefits to the community in the form of job or contractor placement. Additionally, ABI is working with communities and developers to establish other community benefit agreements to ensure that new jobs are created in an economically viable manner by producing area-appropriate amenities and services.

Redevelopment in the TAD is expected to result in the creation of approximately 30,000 permanent new jobs in the Atlanta BeltLine area over the next 20 to 25 years.

Features and Challenges

Development of the Atlanta BeltLine has involved comprehensive corridor-wide planning prior to construction, which may prove advantageous to channeling and facilitating economic growth. In addition to allowing for extensive business planning, this strategy has enabled the development of a community engagement framework—which was created by ABI and approved by the Atlanta City Council—to provide an avenue for community input and participation throughout the design and construction of the Atlanta BeltLine project. Comprehensive planning also has allowed the character and heritage of the communities surrounding the Atlanta BeltLine to be featured through identification and preservation of unique and historic sites.

The Atlanta BeltLine project faces the upcoming challenge of obtaining federal and local funding, in addition to the private donations sought during the project’s capital campaign. Another challenge for the Atlanta BeltLine is obtaining the rights-of-way necessary for construction, as these lands are owned by multiple parties. As of early 2011, about half of the rights-of-way for the corridor have been preserved. The remaining rights-of-way are owned by CSX Transportation, the Georgia Department of Transportation, MARTA, and a private owner.

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Promoting Cross-Sector Partnerships for Equitable TOD November 9–10 Forum Agenda

Tuesday, Nov. 9	Farmers & Fishers restaurant, 3000 K Street, N.W., Georgetown Waterfront
6:00–6:30	Cocktail reception
6:30–9:00	Dinner, welcomes, and self-introductions Presentation, Jair Lynch, President and CEO, JAIR LYNCH Development Partners, Washington, D.C.
Wednesday, Nov. 10	Urban Land Institute, 1025 Thomas Jefferson Street, N.W., Suite 500 West
8:00–8:30	Continental breakfast
8:30–9:10	Welcomes and Forum Overview <input type="checkbox"/> Paul Brophy, Facilitator, Principal, Brophy Reilly LLC <input type="checkbox"/> Patrick Phillips, CEO, Urban Land Institute <input type="checkbox"/> Charles Rutheiser, Senior Fellow, Annie E. Casey Foundation
9:10–9:50	Regional Overviews: Case Studies from Denver, Seattle, Twin Cities, and Atlanta Rachel MacCleery, Managing Director for Infrastructure, ULI, with additional insights from: <input type="checkbox"/> Bill Sirois, Director of TOD, RTD FasTracks, Denver <input type="checkbox"/> Diane Sugimura, Director of Planning, City of Seattle <input type="checkbox"/> John Couchman, Vice President, St. Paul Foundation, Minnesota <input type="checkbox"/> Brian Leary, President and CEO, BeltLine Inc., Atlanta
9:50–11:00	Group discussion
11:00–11:40	Partnerships Panel: Balancing Financial Realities and Equity Goals—the Roles of Partners Moderator: Jonathan Sage-Martinson, Director, Central Corridor Funders Collaborative, Minnesota. Panelists: <input type="checkbox"/> Jim Mueller, Managing Partner, JC Mueller, Seattle <input type="checkbox"/> Robin Kniech, Program Director, FRESC, Denver <input type="checkbox"/> Dr. Beverly Scott, CEO, MARTA, Atlanta
11:40–12:30	Group discussion
12:30–1:00	Networking lunch
1:00–1:20	Developing Principles for Successful Cross-Sector Partnerships for Equitable TOD Overview, individual activities
1:20–2:20	Small group breakouts <input type="checkbox"/> Green group: Library Conference Room, facilitated by Paul Brophy <input type="checkbox"/> Red group: Medium Conference Room, facilitated by Charles Rutheiser <input type="checkbox"/> Blue group: Library, facilitated by John Mclwain <input type="checkbox"/> Yellow group: Executive Conference Room, facilitated by Sam Zimbabwe
2:20–3:00	Small group reports
3:00–3:50	Group discussion
3:50–4:00	Closing remarks and next steps Charles Rutheiser and Paul Brophy