

2014

URBAN LAND INSTITUTE **CHARLOTTE** - ANNUAL REPORT



**Urban Land
Institute**

Charlotte

2014



FY 14 HIGHLIGHTS

During 2014, the focus for ULI Charlotte was on impact, growth and new opportunities. Plans that had been in discussion for years came to fruition, and we are seeing incredible participation and growth as a result. The expanded focus on regionalism highlighted many activities, as our members' market areas and interests have grown over the years.

Regional collaboration with ULI Triangle and South Carolina reaped several benefits in FY14 as well as overall enhanced programming:

- **Regional Sponsorship** – for those companies that want to support and be recognized throughout the Carolinas.
- **Regional Initiative Councils (RICs)** – launched in January, 2014, the RICs are modeled after the national product councils. RIC members are ULI members who have the opportunity to meet and share best practices around a specific topic.
- **Carolinas' Meeting**
– the two-day program brought together more than 425 attendees, showcasing discussions by top decision-makers in the region, industry experts and discussions around building healthy places. In fact, this meeting won a special grant from the ULI Foundation to support the initiative.
- **Regional Partnership Forums** – Young Leaders throughout the Carolinas have the opportunity to meet and discuss land use topics.



FY 14 HIGHLIGHTS

- **Focused symposiums and programing for women** was enhanced. **The Women's Leadership Initiative** launched the Career Development Series featuring discussions around strength-building, life-work balance and communication skills.
- **Hosted discussions around land use.** A ULI National Advisory Panel discussed the **Applied Innovation Corridor** and future opportunities for this corridor. The Technical Assistance Program (TAP) committee has been active in discussing land use opportunities in the community.
- **Facilitated discussions about development** in the **Development 101** class. This class offered public sector officials (staff and elected) to delve into the financial analysis of projects.
- **Community impact** by working with **CONNECT OUR FUTURE** to deliver Reality Check through a HUD Sustainable Communities Grant. Our work and final report was completed in early FY14 and can be accessed at www.realitycheck2050.org

ULI Charlotte is committed to keeping an ongoing focus on being a thought leader in the region for quality development and healthy places. We are the intellectual exchange body in the region for best practices.



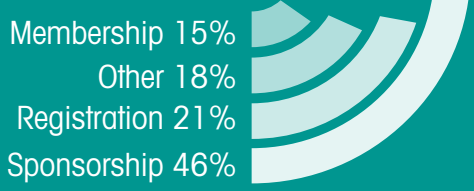
Tracy Dodson
Chair of Mission Advancement



METRICS

Revenue

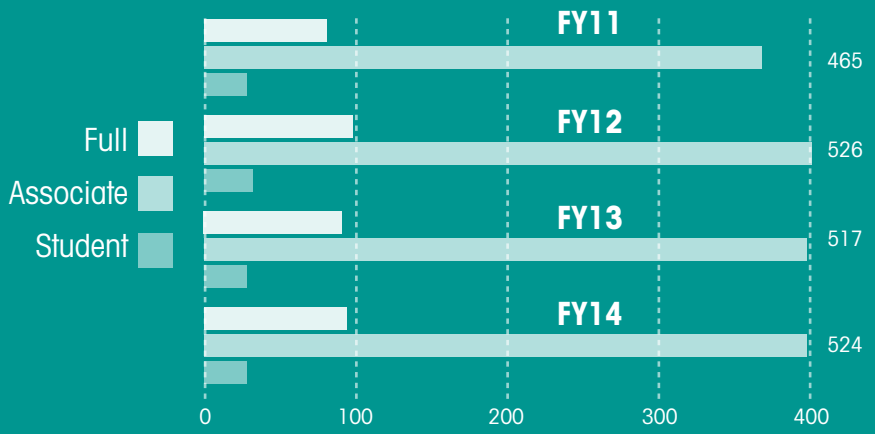
\$349,244



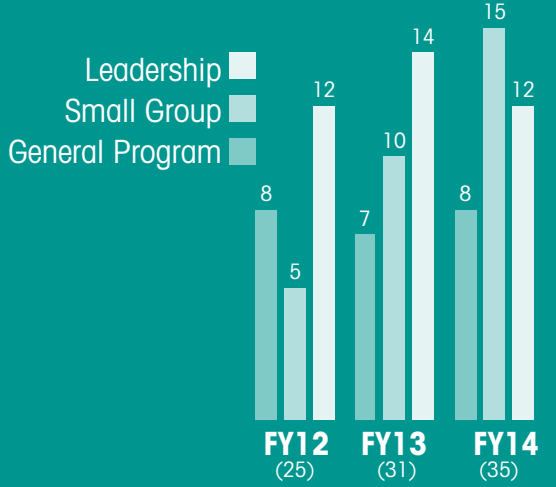
\$379,957

Expenses

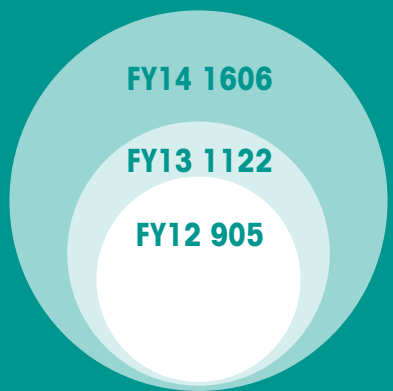
Members by Type



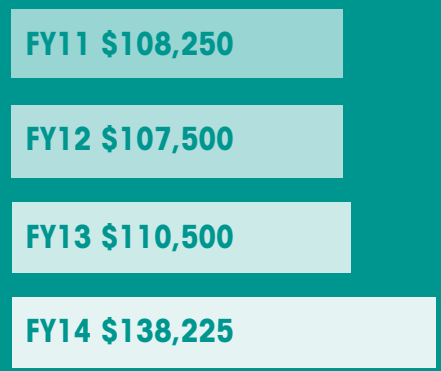
Number of Meetings



Event Attendance



Sponsorship Dollars Raised



CONTENT

Throughout FY14, ULI Charlotte evolved programming to meet the diversity of our membership offering small audiences discussions for targeted groups, as well as broader industry forums. The programs are alive and thriving.

Topics during the year include:

- Pioneers in Real Estate
- Infill and Political Will
- Women Leaders in Real Estate
- Principles of a Mixed Use Project
- Integrated Project Delivery
- Highlight on the Carolina Panthers
- Trends in Real Estate
- Mobile Workshop of Park Road Shopping Center
- Mobile Workshop of EpiCentre



- Development 101
- Charlotte Douglas Airport
- Spring Meeting Recap
- Fall Meeting Recap
- Infrastructure 2014:
The Shaping of a Competitive City
- Building Healthy Places
- Highlight of Greenville, SC
- Work/Life Plan

FY14 DISTINGUISHED SPEAKERS

ULI Charlotte brought top decision makers and leaders to discuss real-world experience focused on building better communities.

Ted Abernathy, Southern Growth Policies Board, Research Triangle Park, NC

Denise Altman, Altman Initiative, Charlotte, NC

Tom Anhut, Ashton Woods Homes, Raleigh Division, Raleigh, NC

Peter Barth, The Iron Yard, Greenville, SC

Jeff Baxter, Cityvolve LLC, North Charleston, SC

Mark Beattie, Hickey & Associates, LLC, Charlotte, NC

Robert "Bob" Bertges, Wells Fargo Corporation, Charlotte, NC

Stephen R. Blank, ULI - the Urban Land Institute, Washington, DC

Ken Bowers, City of Raleigh, Raleigh, NC

Chris Branch, Faison, Charlotte, NC

Collin Brown, K&L Gates, Charlotte, NC



Robert E. Bush Jr., Arts and Science Council of Charlotte-Mecklenburg, Charlotte, NC

Brent D. Cagle, Charlotte Douglas Int'l Airport, Charlotte, NC

Debra Campbell, Charlotte-Mecklenburg Planning Department, Charlotte, NC

Ron Carlee, City of Charlotte, Charlotte, NC

Mike Corona, Adolfson & Peterson, Charlotte, NC

Ned Curran, The Bissell Companies, Charlotte, NC

Pamela Davies, Ph. D, Queens University of Charlotte, Charlotte, NC

Tracy Dodson, Lincoln Harris, LLC, Charlotte, NC

Frank Emory, Hunton & Williams, LLP, Charlotte, NC

Mark Ferris, Hines, Atlanta, GA

Wendy Field, Wendy Field Consulting, Charlotte, NC

Sonja Gantt, WCNC-TV, Charlotte, NC



- Patricia G. Garrett**, The Housing Partnership (retired)
John Grab, Mead Westvaco, Summerville, SC
Rhea Greene, Trinity Partners, Charlotte, NC
Bob Hagemann, City of Charlotte, Charlotte, NC
Johnny Harris, Lincoln Harris, LLC, Charlotte, NC
Michael Harrison, Hines, Atlanta, GA
Clyde Higgs, Castle & Cooke, Inc., Kannapolis, NC
James Hill, Mead Westvaco, Summerville, SC
Ted Hill, Vision Ventures, Charlotte, NC
Mary Douglas Hirsch, City of Greenville, Greenville, SC
David Howard, Charlotte City Council and Charlotte Mecklenburg Housing Partnership, Charlotte, NC
Robert Hughes, Hughes Development, Greenville, SC
John Hunter, Womble Caryle Sandridge & Rice, Charlotte, NC
Kati Hynes, Charlotte Chamber of Commerce, Charlotte, NC
Rick Judson, Evergreen Group, Charlotte, NC

- John Kane**, Kane Realty Corporation, Raleigh, NC
Hal Kempson, CBRE, Charlotte, NC
Matt Kennell, City Center Partnership, Columbia, SC
Ron Kimble, City of Charlotte, Charlotte, NC
Ted Klinck, Highwoods Properties, Raleigh, NC
Mary Beth Kuzmanovich, Charlotte, NC
Todd Mansfield, Crescent Communities, LLC, Charlotte, NC
Matthew Martin, Federal Reserve Bank of Richmond, Charlotte, NC
Maureen McAvey, ULI-the Urban Land Institute, Washington, DC
Bill Meyer, City of Rock Hill, Rock Hill, SC
Jason Mink, Charlotte, NC
Chase Monroe, JLL, Charlotte, NC
Darla Moore, Palmetto Institute, Columbia, SC
Bob Morgan, Charlotte Chamber of Commerce, Charlotte, NC
Danny Morrison, Carolina Panthers, Charlotte, NC
Steve Navarro, The Furman Co., Greenville, SC
Dionne Nelson, Laurel Street Residential, Charlotte, NC
Steve Nicholson, Citrix, Santa Barbara, CA



- Tyler Niess**, Crescent Communities, Charlotte, NC
Peter A. Pappas, Pappas Properties, LLC, Charlotte, NC
Mack Paul, Morningstar Law Group, Morrisville, NC
Patrick Phillips, ULI - the Urban Land Institute, Washington, DC
Lat W. Purser, Lat Purser & Associates, Inc., Charlotte, NC
Dan Rajkowski, Charlotte Knights, Charlotte, NC
Dustin Read, UNCC Center for Real Estate, Charlotte, NC
Amy Riley, Thomas & Hutton, Mount Pleasant, SC
Toby Roberts, Wells Fargo Home Mortgage, Charlotte, NC
Kathleen Rose, Rose & Associates Southeast, Inc.,
 Davidson, NC
Ruth Samuelson, NC State House of Representatives,
 Charlotte, NC
Julie Schoenagel, BlueCross BlueShield of North Carolina,
 Durham, NC
Jim Schumacher, Schumacher Urban Projects, Charlotte, NC
Bobbie Shields, Mecklenburg County (retired), Charlotte, NC
Terry Shook, Shook Kelley, Charlotte, NC
Nina Shor, Rogers Townsend Attorneys at Law, Charlotte, NC
Frank Spencer, Habitat for Humanity, Charlotte, NC
Mayor Jill Swain, Town of Huntersville, NC



- Mark M. Sweeney**, McCallum Sweeney Consulting,
 Charlotte, NC
Charles Teal, Saussy Burbank, LLC, Charlotte, NC
Chris Thomas, Childress Klein Properties, Charlotte, NC
Tom Webb, Faison, Charlotte, NC
Nancy Welsh, Builders of Hope, Raleigh, NC
Ryan Wetherington, Allen Tate, Charlotte, NC
Knox White, City of Greenville, Greenville, SC
Nancy Whitworth, City of Greenville, Greenville, SC
Margo Williams, Town of Davidson
 (Davidson Design for Life), Davidson, NC
Perry Woodside, Dixon Hughes Goodman LLP, Greenville, SC
Kristin Worley, Woolpert, Charlotte, NC
Landon Wyatt, Childress Klein Properties, Charlotte, NC
Smedes York, York Properties, Inc., Raleigh, NC

FY14 VOLUNTEERS

From committee participation and leadership to community impact activities, ULI members are the strength of the organization. Thanks to our volunteers for their service to ULI.

Alan Aschenbrenner, 505Design
Kyle Baugh, Kimley-Horn and Associates, Inc.
Fred Bolt, Adolfson & Peterson Construction
Chris Briggs, Terracon Consultants, Inc.
Jeff Brown, Moore & Van Allen
Debra Campbell, City of Charlotte
Jeff Cernuto, Princeton Management
Rob Cochran, DTZ
Richard Cox, Charlotte City Center Partners
Nancy Crown, Bank of America Merrill Lynch
Josh Davis, Grandbridge Real Estate Capital, LLC
Mike Davis, City of Charlotte



Amy Jo Denton, BENCHMARK planning
Darryl Dewberry, Spectrum Properties
Ambrose Dittloff, Carocon Corporation
Bridget Dixon, City of Charlotte
Tracy Dodson, Lincoln Harris
Nate Doolittle, LandDesign
Walter Fisher, Troutman Sanders
Jim Gamble, Bohler Engineering
Chuck Graham, Newton Graham Consultants
Darlene Heater, University City Partners
Tobe Holmes, Charlotte City Center Partners
Mary Hopper, Hopper Consults
Hal Kempson, CBRE
Ron Kimble, City of Charlotte
Steve Lineberger, LINEBERGER Planning + Design
Emma Littlejohn, The Littlejohn Group
Jared Londry, DTZ
Keith MacVean, Moore & VanAllen
Bill Matthews, Jr., Womble Carlyle Sandridge & Rice, LLP
Jonathan McLester, GreerWalker
Elizabeth McMillan, Crescent Communities

Shawn Messimer, Vannoy Construction
Ron Messenger, Grant Thornton
Andy Miller, Kimley-Horn and Associates, Inc.
Mark Miller, Lat Purser & Associates
Scott Mingonet, Kimley-Horn and Associates, Inc.
Stefanie Mitchell, Parker Poe Adams & Bernstein, LLP
Jason Moore, Clancy & Theys Construction Company
Bart Murr, Insite Properties
Meg Nealon, LandDesign
Brian Nicholson, Levine Properties
Phil Norwood, Haviland Capital, LLC
Mike Ortlip, Grandbridge Real Estate Capital, LLC
Alysia Osborne, City of Charlotte
Philip Payne, Ginkgo Residential
Chris Perri, CB Richard Ellis
Richard Petersheim, LandDesign
Danny Pleasant, City of Charlotte DOT
John Porter, Charter Properties, Inc.
Jim Prosser, Centralina Council of Governments
Lat H. Purser, Lat Purser & Associates
Lat W. Purser, Lat Purser & Associates
Dustin Read, UNC Charlotte
Dennis Ritcher, Solterra Partners

David Rosenthal, Millennium Real Estate Advisors
Greg Ross, Grant Thornton
Charlie Rulick, Miller-Valentine Group
Danny Seagraves, Willis of NC
Terry Shook, Shook Kelley
Nina Shor, Rogers Townsend Attorneys at Law
Bill Simerville, Cushman Wakefield | Thalhimer
Frank Spencer, Habitat for Humanity
Stephen Stansbery, Kimley-Horn and Associates, Inc.
Cheryl Steele, Horack, Talley, Pharr and Lowndes, PA
Amy Sullivan, ECS Carolinas, LLP
Charles Teal, Saussy Burbank, LLC
Tina Votaw, Charlotte Area Transit System
Ian Wagoner, Spectrum Properties
David Walters, UNC Charlotte
Don Ward, Bank of America Merrill Lynch
Frank Warren, Kimley-Horn and Associates, Inc.
Brian Welch, ESP Associates, P.A
Scott Wilkerson, Ginkgo Residential
Jim Williams, LS3P
Steve Windell, US Bank
Kristen Worley, Woolpert
Tom Wright, NarmourWright



FY14 LEADERSHIP

Through the commitment and support of our volunteer leaders, we are able to deliver quality programming and outreach in our community.

Management Committee

District Council Chair

Tracy Dodson

Lincoln Harris

Chair of Mission Advancement

Ron Kimble

City of Charlotte

Treasurer

Greg Ross

Grant Thornton

Immediate Past Chair

Charles Teal

Saussy Burbank, LLC

Sponsorship Chair

Nina Shor

Rogers Townsend Attorneys at Law

Membership Chair

Mike Ortlip

Grandbridge Real Estate Capital, LLC

Programs

Rob Cochran

DTZ

Young Leaders Chair

Lat H. Purser

Lat Purser & Associates, Inc.



Governance Committee

Immediate Past Chair

and Chair of Governance

Charles Teal

Saussy Burbank, LLC

Chair of Mission Advancement

Ron Kimble

City of Charlotte

District Council Chair

Tracy Dodson

Lincoln Harris

Past Chair

Lat W. Purser

Lat Purser & Associates

At-Large

Phil Norwood

Haviland Capital, LLC

At-Large

Debra Campbell

Charlotte Mecklenburg
Planning Department

Advisory Board

District Council Chair
Tracy Dodson
 Lincoln Harris

Chair of Mission Advancement
Ron Kimble
 City of Charlotte

Immediate Past Chair
Charles Teal
 Saussy Burbank, LLC

Treasurer
Greg Ross
 Grant Thornton



Committee Chairs

Sponsorship
Nina Shor
 Rogers Townsend Attorneys at Law

Membership
Mike Ortlip
 Grandbridge Real Estate Capital, LLC

Programs
Rob Cochran
 DTZ

Outreach/HUD Grant
Scott Mingonet
 Kimley-Horn and Associates, Inc.

TAPS
Dennis Richter
 Solterra

Academic Development
Don Ward
 Bank of America Merrill Lynch

Young Leaders
Lat H. Purser
 Lat Purser & Associates, Inc.

Communications
Mary Hopper
 Hopper Consults

Women's Leadership Initiative
Bridget Dixon
 Charlotte Mecklenburg Planning Dept.



At Large Members

Phil Payne
 Ginkgo Residential

Dan Warren
 Elliott Davis Decosimos

Scott Mingonet
 Kimley-Horn and Associates, Inc.

Jonathan McLester
 GreerWalker

Fred Bolt
 Adolfsen & Peterson Construction

Steve Windell
 US Bank

Walter Fisher
 Troutman Sanders

Jeff Brown
 Moore & VanAllen

Tricia Gordon
 Bradley Arant Boult Cummings

Jim Prosser
 Centralina Council of Governments

ULI Charlotte Past Chairs

1999-2001

Peter A. Pappas, Pappas Properties

2001-2002

Arthur W. Fields

2002-2004

Lat W. Purser, Lat Purser & Associates

2004-2006

A. Michael Burnett, Burnett Real Estate
Advisory Services

2006-2008

Thomas B. "Skeet" Harris,
TB Harris & Associates

2008-2010

E. Allen Prichard, K&L Gates

2010-2012

Charles E. Teal, Saussy Burbank

2012-2014

Tracy Dodson, Lincoln Harris

FY14 SPONSORS

The financial support by our sponsors enables ULI Charlotte to deliver on our mission throughout the region. Thank you to each of these companies for their support in 2014.

Champion Level



Partner Level

CBRE | Crescent Communities | Robinson Bradshaw & Hinson | Stewart | Terracon

Advisor Level

Bissell | Carocon | Charter Properties, Inc. | CohnReznick | ColeJenest & Stone*
Dixon Hughes Goodman LLC* | Faison | First Tennessee Bank* | Horack, Talley, Pharr & Lowndes
Lat Purser & Associates, Inc. | LS3P Associates LLP | McAdams | McGuire Woods | Saussy Burbank
Spectrum Properties | Strategic Moves Air Charter | SunTrust Bank* | UNC Charlotte
The Walter Fields Group | Woolpert