

CASE STUDY GUIDELINES (2/2019)

ULI Charlotte Case Studies explore new market trends and project best practices. The intent of the case study is to draw from the experience of our region to share innovative approaches to real estate and development. Projects may be a private or public and of any size/scale. Suggested topics may include affordable housing, sustainability, creative placemaking, mobility, TOD, open space, community engagement, adaptive reuse. Other topics are also encouraged.

The projects and topics selected should:

- Achieve a high standard of excellence in areas of design, planning, construction, financing, economics and management.
- Demonstrate relevance to present and future needs of the community.
- The project should be largely completed and operating.
- Data and information on the project should be readily available for inclusion in the case study.
- The project should provide lessons, strategies, and techniques that can be used or adapted in other developments.

Case Study Elements

1. Project Data/Information Form – each case study submission should include the case study data form.
2. Project Summary – a brief description (150 words or less) of what the project is, what uses are included, basic facts about the project, and why it should be of interest to others.
3. Site and Idea – a brief description of the site and how the developer came to the ideas behind the development concept. What other people or cities were considered when creating your vision?
4. Development Background – description about the steps that lead up to the state of the project, including the approval process, community engagement, development challenges, and the developer’s organization and approach to development.
5. Financing – a brief description of the basic costs, sources of equity and financing, financing strategy and public financing or other partnerships, and general project cost.
6. Planning and Design – discussion of the design of the project, including where and why, the architecture, interior layouts and design, parking, landscape design, etc.
7. Special Features – if applicable, a discussion of the special project features such as sustainability, energy efficiency, health, resilience, universities, or other topics.
8. Marketing, Management, Tenants, and Performance – a discussion of the marketing, management, sales and leasing strategy, the tenants and project performance as compared to proforma expectations.
9. Observations and Lessons Learned – discuss what is unusual, or exemplary about the project, why it is important, mistakes that were made, what worked best and what did not, and general lessons learned.

Graphics

- Provide 3-5 images and a site plan. Images should be high resolution (300 dpi) and should be accompanied by captions and photographer credits. Color and digital images are preferred.
- Submit a signed image release form noting the images.

Final Case Study Package

A volunteer from the ULI Charlotte Content Development Committee will assist with case study development. A committee member can interview, review and assist with putting together a compelling package. Once the package is submitted, the committee will review and produce a 2-3 page Case Study to publish on www.charlotte.uli.org. The submitter will have the opportunity to review, prior to publishing, to ensure all facts and critical information are included and stated correctly. Submit Project Information form and package to theresa.salmen@uli.org.

Project Information

Project Name

Project Address

Development Timeline (site purchased, construction started, project opened)

Land Uses/Gross Building Area (office, retail, hotel, residential, industrial, parking, other)

Developer Name (Company, City/State, website)

Owner (if different than developer)

Lead Designer

Other Key Development Team Members

Primary Contact Name

Primary Contact Phone

Primary Contact Email