

ULI District Council Task Forces
for Health and Social Equity

Change for Good

Lessons from ULI's District Council
Task Forces for Health and Social Equity



Cover photo: Left: Eric Allix Rogers.

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www.uli.org/taskforces

About the Urban Land Institute

The Urban Land Institute is a global, member-driven organization comprising more than 45,000 real estate and urban development professionals dedicated to advancing the Institute's mission of shaping the future of the built environment for transformative impact in communities worldwide. Established in 1936, the Institute has a presence in the Americas, Europe, and Asia Pacific regions, with members in 80 countries.

About the ULI Building Healthy Places Initiative

Around the world, communities face pressing health challenges related to the built environment. Through the Building Healthy Places Initiative, launched in 2013, ULI is leveraging the power of ULI's global networks to shape projects and places in ways that improve the health of people and communities. Building Healthy Places is working to make health, social equity, and wellness mainstream considerations in real estate practice. Learn more and connect with Building Healthy Places: uli.org/health.

ULI's District Council Task Forces for Health and Social Equity

ULI's District Council Task Forces for Health and Social Equity program are led by the ULI Building Healthy Places Initiative with support from the Robert Wood Johnson Foundation. ULI district councils in Arizona, Chicago, Sacramento, and Tampa organized member-led task forces to explore solutions to local policy and practice barriers to promote healthier and more equitable communities. To view more resources from this project and the participating cities, visit uli.org/taskforces.

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Introduction

Change for Good: Lessons from ULI's District Council Task Forces for Health and Social Equity chronicles the efforts of district councils in Chicago, Phoenix, Sacramento, and Tampa to address local policy and regulatory barriers to creation of healthier and more equitable places for all residents. These initiatives were sparked by a program led by ULI's Building Healthy Places Initiative.

Conducted during 2019 and 2020, the program provided ULI members the opportunity to leverage their leadership positions in their communities to explore and document problematic policies and practices, push for reform, and effect positive change. Three of the four district councils convened task forces of local members and other experts in areas such as health and wellness to participate in the initiative; another assembled a panel of nonlocal experts to work with a local advisory group.

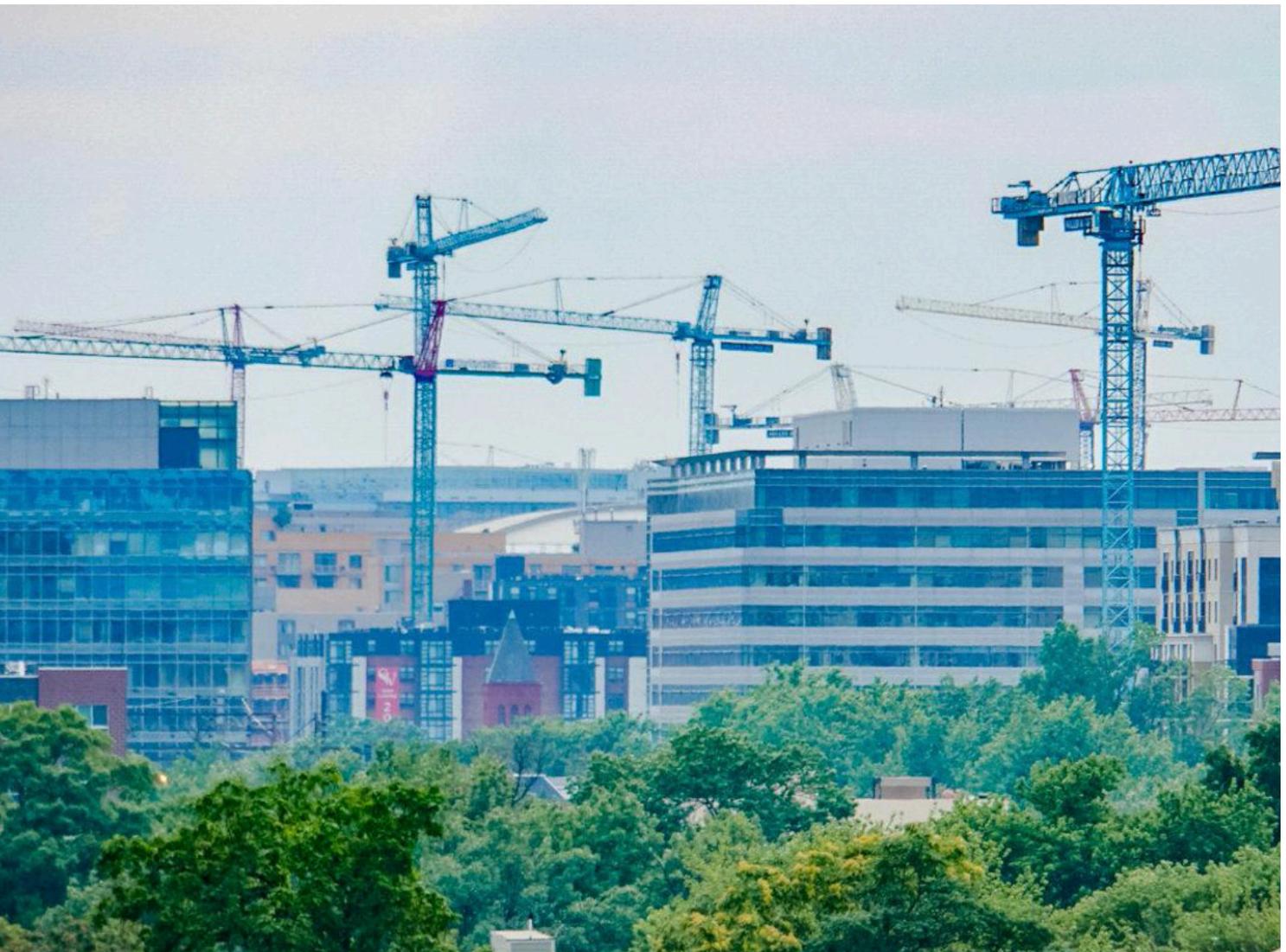
The program was based on five primary goals:

- Move the needle on crucial land use and transportation policy and practice barriers affecting health;
- Address social equity issues and engage historically underrepresented or underserved citizens;
- Bring a level of health, policy, and planning expertise that is often out of reach to the host community;
- Deliver replicable, sustainable, and model solutions applicable to communities nationwide; and
- Advance and/or foster action and implementation.

Within the framework of these goals, three district council task forces targeted housing affordability, recognizing that good-quality attainable housing is linked to health and equitable outcomes. ULI Chicago sought to increase the availability of accessory dwelling units (ADUs) to help offset the city's affordable housing shortage; ULI Arizona worked to raise awareness of the housing affordability crisis gripping the Phoenix metro area; and ULI Tampa Bay's initiative involved advising the city of Tampa on its plan to meet aggressive new goals for new units of affordable and attainable housing. ULI Sacramento took a slightly different approach, building upon recommendations of a 2018 ULI Advisory Services panel promoting equitable transit-oriented development in South Sacramento, by focusing on building trust and empowering residents to engage in neighborhood decision-making.

This report features executive summaries of each of the four initiatives that include observations, findings, and recommendations from the task forces and the panel implementing the initiatives. This report also includes common themes and takeaways gleaned from the experiences.

One lesson learned early on is the importance of being nimble—being able to switch or alter plans because of unforeseen circumstances. The year 2020 brought increased attention to health as a result of the COVID-19 pandemic and to social equity in the form of the racial justice movement across the United States. In addition, local political issues affected projects, in one case requiring a team to pivot after a year of work when a regional transit bill, the focus of their task force, was ruled unconstitutional by the state's supreme court. Despite the unforeseen external forces, district councils persevered, and early indications are that these efforts are beginning to make a measurable difference in their communities.



Market-driven growth, past and current policy decisions, and demographic shifts have converged, exacerbating the shortage of affordable housing for renters and buyers throughout the United States.

The program was designed to promote the cross-collaboration of ideas among teams and to ensure that race and class considerations were thoughtfully embedded into their project work plans. The program cultivated a multidisciplinary cohort of geographically diverse ULI members who acted as “pollinators” within their communities and ULI. Through recurring joint convenings and online forums that provided program participants opportunities for listening, learning, and networking, task force members became passionate experts in health and social equity. Participants were also exposed to a variety of perspectives from experts in the field, including the project’s team of equity advisers, who often moderated sessions and provided space for personal reflection and growth.

The task force community has increased awareness of critical issues, built trust with and empowered residents, and advanced policy change in their cities. Importantly, ULI’s work does not end here. Each team is committed to advancing task force recommendations and community-defined outcomes. ULI and the participating district councils hope the initiatives shared in this report inspire cities across the United States to ground their decision-making in health and equity considerations, making these lenses integral and permanent components of community-building going forward.

Chicago has a worsening shortage of affordable housing for moderate- and lower-income households. However, a partial remedy, accessory dwelling units (ADUs) such as backyard, attic-, and basement-level units are restricted and challenging to construct. The ULI Chicago task force identified the numerous barriers to building ADUs and developed a set of recommendations that inspired and informed Chicago’s ADU pilot program.

Chicago

Unlocking a Citywide Accessory Dwelling Unit Policy

ULI CHICAGO TASK FORCE
CO-CHAIRS

Todd Berlinghof and
Molly Ekerdt

@2020 GOOGLE



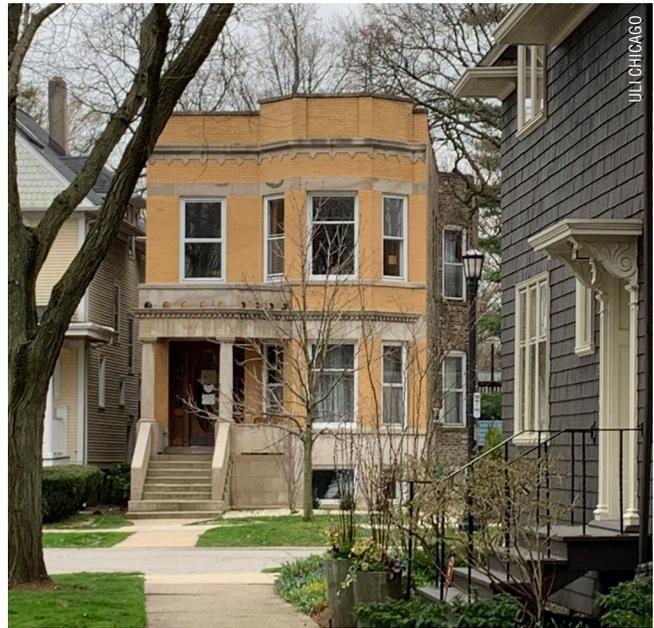
Although accessory dwelling units have historically been an integral part of Chicago’s inventory of affordable housing, city policy since the 1950s has made such units difficult or even impossible to create or maintain.

The ULI Chicago task force worked to expand housing options in the city by addressing regulatory barriers to the creation of ADUs. The effort was a collaboration between ULI Chicago and the city of Chicago, including the Departments of Housing, Buildings, and Planning and Development. The effort prompted a set of zoning reform proposals that were approved by the Chicago City Council on December 16, 2020. The approved proposals were part of a package that had been under consideration by the city’s Joint Committee on Housing and Zoning to allow construction and rehabilitation of ADUs throughout the city.

ADUs are smaller, independent dwelling units with a full kitchen and bathroom and can be attached or detached from a primary residential building. The units, sometimes referred to “granny flats,” “mother-in-law units,” or “coach houses,” are emerging as a much-needed housing option in cities nationwide. They can be created as part of new construction or added to existing residential buildings by repurposing basement and attic spaces or by building an extension or a separate stand-alone unit on the property.

Starting in August 2019, ULI Chicago convened a task force that engaged nearly 100 community, industry, and public-sector stakeholders to develop a successful ADU policy for the city that could be replicated in other communities. Co-chaired by ULI Chicago leaders Todd Berlinghof, partner at commercial development firm Hamilton Partners, and Molly Ekerdt, vice president at the Preservation of Affordable Housing organization, the task force consisted of housing, planning, and development experts from across the Chicago-land region. As the group continued its work during 2020, it became apparent that the need for safe, healthy, and affordable housing would likely increase as more households faced unemployment and rising economic uncertainty because of the COVID-19 pandemic. This further reinforced the need for ADUs to address the city’s growing housing challenges.

Many types of ADUs, such as basement units, are likely to be more affordable than other housing in neighborhoods, thereby increasing rental housing options for lower- and middle-income households, including younger households seeking starter housing or seniors looking to downsize. ADUs can serve as a source of financial stability, wealth building, and revenue generation for property owners, especially those who are affected by rising housing costs and who would benefit from an additional income stream.



The new Chicago building code has a separate occupancy category with more flexible requirements for smaller residential buildings.

The task force’s initiative was based on the premise that housing is fundamental to health. From this, it focused on ADUs as a way to help foster more inclusive, equitable, and healthier living environments by opening up more neighborhoods and their amenities to people in a broader income range, encouraging engagement by a more diverse group of residents, and ultimately cultivating more stakeholders committed to providing a better quality of life for all people in the community.

The ADU proposal approved by the City Council involves lifting restrictions on “illegal” units—those that are still occupied but that cannot be repaired or upgraded to comply with the city’s building code under the current zoning ordinance. This proposal reflected recommendations from the task force on bringing ADUs up to code to make sure the residents would have healthier living conditions.

The task force’s work fits well with ULI’s efforts to create vibrant, equitable communities, because it involves enhancing land value through the addition of less intensive density, and it enhances the existing urban fabric by retaining and improving housing, rather than demolishing it to build more expensive, less dense housing. The initiative aimed at creating ADUs in neighborhoods throughout the city but took special care to consider the needs of underinvested neighborhoods as well as traditionally exclusionary neighborhoods.

Unlocking ADUs

Policy Research and Convening Lessons for Chicago



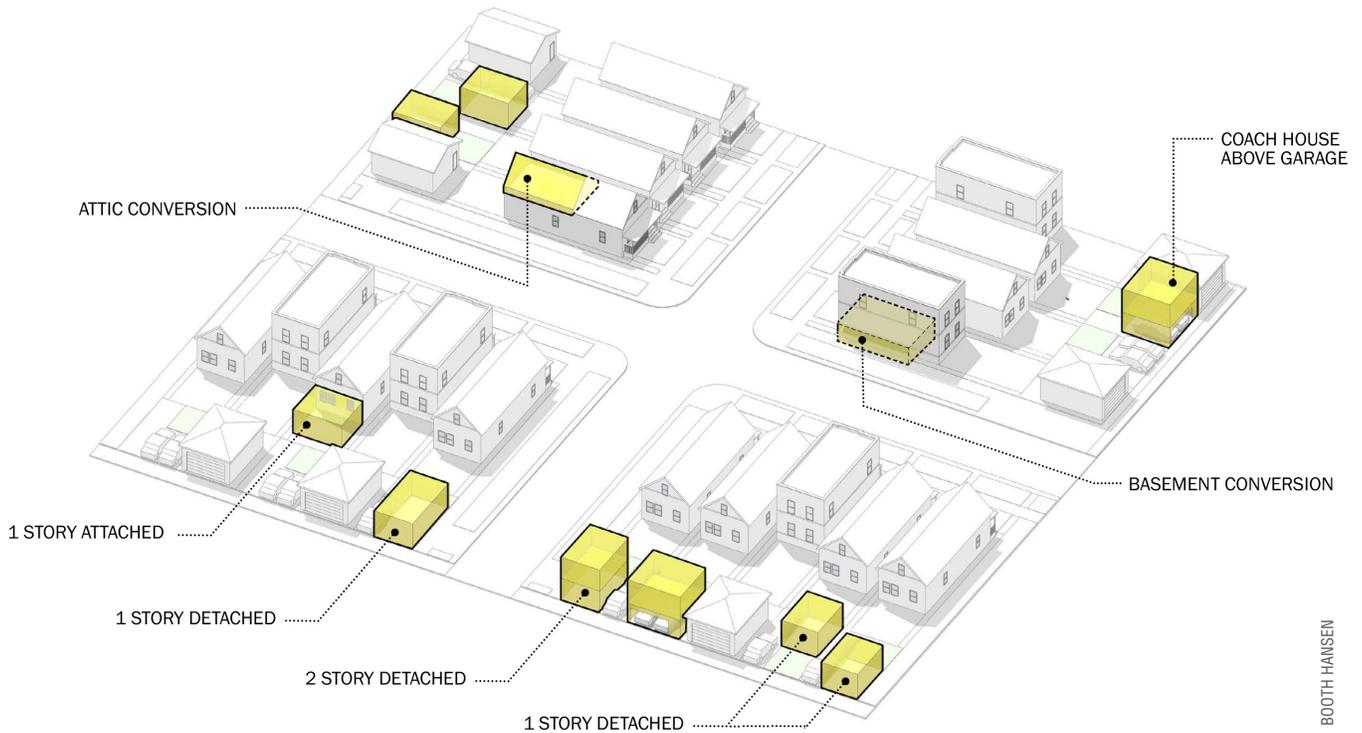
The full ULI Chicago task force report and companion resources are available at uli.org/taskforces.

The city's most recent five-year housing plan, which focused on policy changes to encourage ADUs as a way to create affordable rental housing and increase homeownership opportunities, informed the task force's work. The group conducted extensive stakeholder engagement as well as a comprehensive review of the city's housing stock and development trends, and it explored best practices and research from other cities that support ADUs, including Minneapolis, Boston, Washington, D.C., and Los Angeles. From this work, the group prepared a framework of recommendations for the city as it considers adopting new ADU-friendly zoning regulations. The recommendations, featured in a ULI Chicago report, *Unlocking ADUs: Policy Research and Convening Lessons for Chicago*, include the following:

- **Ease regulatory restrictions.** Easing restrictions that either prohibit the creation of ADUs or make it very difficult to site them on typical lots is the first step in unlocking the ADU opportunity in Chicago.

- **Raise awareness of the city's new ADU-friendly building code.** A new building code that took effect in August 2020 includes many ADU-friendly regulations, including those for building materials, minimum space requirements for building size and ceiling heights, and exiting requirements.
- **Make the application and review process simple, unambiguous, and expeditious.** The city should coordinate interdepartmental review processes to provide a single point of contact for ADU applicants, and the city should adopt a solutions-based approach to building inspections that focuses on improving health and safety.
- **Explore ways to lower the costs of ADU construction.** Cut construction costs by using design guidelines developed for Chicago site and building conditions; using a preapproved ADU design for stand-alone backyard ADUs; using prefabricated dwelling units; and minimizing fees such as permit and inspection fees, fees for utility connections, and development impact fees.
- **Overcome financial barriers.** Expand financing options for owner-occupiers and smaller property owners, who are likely to face greater challenges in accessing financing.
- **Foster an equitable ADU policy.** Encouraging equitable development, where a variety of ADUs are built in neighborhoods across the city by property owners from a range of incomes, racial and ethnic backgrounds, and at affordable price points, will require a deliberate effort including direct subsidies.

The pilot ordinance approved by the City Council allows construction of ADUs in five neighborhoods equitably distributed throughout the city. It lifts some of the restrictions that have made existing units difficult to replace or reuse, and it eases requirements for off-street parking that have often made it difficult to accommodate ADUs. It also provides for the establishment of grants to help homeowners bring illegal units up to code, as well as funding from the city's Low-Income Housing Trust Fund to help moderate-income homeowners fund new ADUs.



Accessory dwelling units come in a variety of forms, including attic- and basement-level units, as well as stand-alone structures.



Older two-flats and four-flats make up a significant portion of Chicago's residential building stock.

The task force is hopeful that the new zoning ordinance change will ultimately lead to greater ADU availability throughout the Chicago metropolitan region and serve as a model for other metro areas across the nation. In addition to co-chairs Todd Berlinghof and Molly Ekerdt, task force members included Bryan Esenberg, deputy commissioner, Department of Housing, City of Chicago; Rafael Leon, executive director, Chicago Metropolitan Housing Development Corporation; Brad White, associate director, Alphawood Foundation, Chicago; Paul Williams, former staff member, Department of Housing, City of Chicago; and Stacie Young, director, The Preservation Compact, Chicago.

City of Chicago representatives working with the task force included Patrick Murphey, zoning administrator, Department of Planning and Development; Harry Osterman, Alderman, 48th Ward; Cynthia Roubik, assistant commissioner, Department of Planning and Development; Grant Ullrich, deputy commissioner, Department of Buildings; and Steven Valenziano, assistant zoning administrator, Department of Planning and Development.

Throughout metro Phoenix, a growing number of households are being priced out of the housing market, particularly near transit and essential service infrastructure. The ULI Arizona task force prepared a framework for planners and policymakers to collaboratively implement market strategies for attainable housing solutions that support inclusivity and avoid displacement.

Phoenix

Expanding Workforce Housing Strategies for Metro Phoenix

ULI ARIZONA TASK FORCE
CO-CHAIRS

C.J. Eisenbarth Hager
and Silvia Urrutia



Throughout metro Phoenix, a growing number of households—low income, workforce, millennial, and senior—are being priced out of revitalizing urban centers, particularly near transit and essential service infrastructure.

Recognizing the connection between health, social equity, and proper housing, the ULI Arizona task force sought to uncover applicable solutions to the growing housing affordability crisis facing essential service providers and other moderate-income workers throughout the Phoenix metropolitan region. The effort, which identifies strategies to increase the area's supply of workforce housing, is intended primarily to support residents who do not qualify for housing subsidies but also do not earn enough to afford market-rate housing in centrally located neighborhoods near transit, essential service infrastructure, and employment hubs.

Working in partnership with the Vitalyst Health Foundation in Phoenix and the ULI Building Healthy Places Initiative, the district council began in 2019 by forming the task force to identify innovative ways to counter the region's shortage of workforce housing. This type of housing is generally defined as housing for workers earning between 60 and 120 percent of the area medium income (AMI), which ranges between \$38,000 and \$74,000 annually in the metro Phoenix area. It is distinguished from affordable housing, which is generally characterized as housing for lower-income residents earning less than 60 percent of the AMI.

The task force's work was informed by a February 2020 roundtable discussion including representatives from Arizona governor Doug Ducey's staff and local stakeholders from the public, private, and nonprofit sectors; and by an evaluation of existing housing programs in Arizona as well as best practices in workforce housing development in other areas. Research was conducted by Arizona State University graduate student Elizabeth Van Horn, who is now an urban planner and public health analyst for Harris County, Texas.

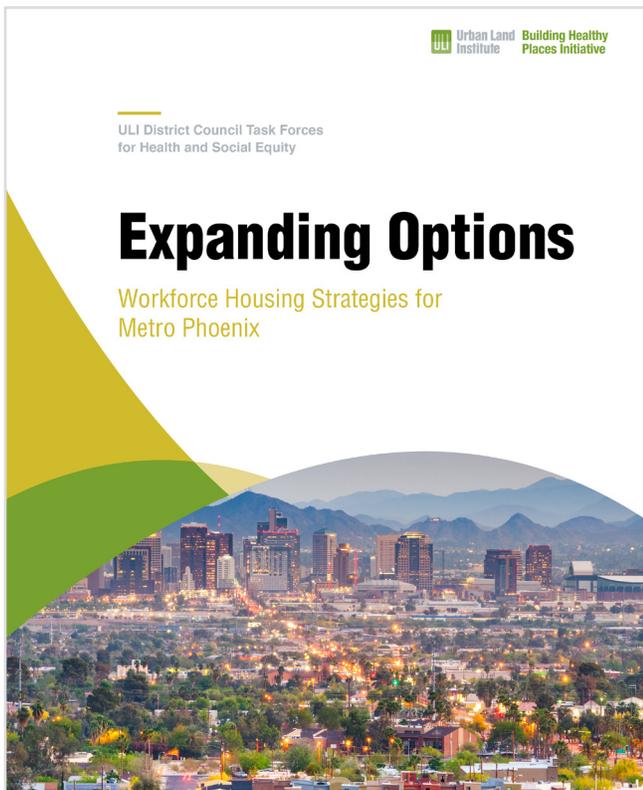
Co-chaired by C.J. Eisenbarth Hager, director of healthy communities at the Vitalyst Health Foundation, and Silvia Urrutia, founder and chief executive officer of U Developing LLC, the task force examined 74 policies for community investment that foster health and social equity. Although the Phoenix metro area has a variety of housing challenges, such as rising homelessness, a lack of subsidized housing, and statewide prohibition of policy tools such as inclusionary zoning and tax increment financing, the task force chose to address workforce housing because of its often overlooked and growing importance in the market.



While affordable housing developers often have tight budgets, strategies exist that allow them to build units that are visually appealing and offer comfort and convenience to residents while meeting all the essential requirements of safe, healthy housing.

Historically, the supply of workforce housing has been replenished through the natural maturation of older products, often referred to as “naturally occurring affordable housing” (NOAH), rather than new development. However, in evaluating workforce housing availability, the task force found that NOAH in the Phoenix region has been squeezed by redevelopment pressures, with the existing supply at risk of becoming unaffordable or being demolished to accommodate new, more expensive housing. In addition, much of the existing NOAH stock is subpar and unhealthy, with poor ventilation and no air conditioning, and is concentrated in areas with a history of disinvestment.

Even before COVID-19, which spotlighted the health vulnerabilities of people living in substandard and crowded housing, working families living in these conditions have suffered from a variety of health issues. The task force noted that housing intersects with health from three standpoints: shelter, affordability, and location. As shelter, housing fills a basic human need for a safe, decent place to live. Regarding affordability, families on tight budgets often are forced to compromise their health (such as skipping doctor visits or forgoing medicine prescriptions) to make housing payments. And in terms of location, the context in which housing is placed (near jobs, good schools, economic opportunity, and other assets) is very important to the well-being of individuals and families.



The full ULI Arizona task force report and companion resources are available at uli.org/taskforces.

In exploring how to make workforce housing more widely available, the task force also considered historical injustices related to health and housing that are reflected in neighborhoods segregated by race and ethnicity, as well as access to necessities such as transit, preventive health care services, and healthy foods. Because those who need workforce housing include a significant number of Black people, Latinos, indigenous people, and other people of color, increasing and distributing the supply across the metro area would help increase neighborhood diversity, social equity, and inclusiveness, the task force concluded.

The group examined the potential for five housing typologies to be expanded throughout metro Phoenix: “missing middle” housing, ADUs, co-located housing and community facilities, co-living, and cohousing. The task force drew upon successful examples of each type in cities across the nation to determine how each could effectively address the region’s workforce housing shortage.

The task force’s work is detailed in a report, *Expanding Options: Workforce Housing Strategies for Metro Phoenix*. It is centered around six key themes and related solutions that are directed at Phoenix’s housing situation but remain equally valid as solutions for communities nationwide. These themes and solutions are as follows:

- **Inclusive community investment without displacement.** Conduct neighborhood demonstration projects that use inclusive and equitable redevelopment strategies; create a regional housing strategy to address the workforce and affordable housing shortage; develop an interactive web platform for housing affordability; and consider using community benefits agreements and housing cooperatives to help residents to stay in neighborhoods.
- **Planning and regulations.** Review and simplify zoning codes and development guidelines; offer incentives for workforce housing development; promote consistency between jurisdictions with model building codes; foster collaboration between local government agencies to address housing objectives holistically; develop a repository for preapproved, permit-ready housing plan options; and prioritize community engagement and education to cultivate “yes-in-my-backyard” strategies.
- **Finance and capital.** Work with investors to expand and diversify project financing; create more local financing options and equitable access to capital; leverage vacant private and city-owned land to increase the workforce housing supply; and leverage tax abatement incentives to encourage development that is affordable.
- **Land and location.** Maximize and leverage the use of existing buildings; partner with landowners to explore opportunities for adding value to underused or vacant land through workforce housing development; leverage land banks to acquire land; and use community land trusts to help ensure long-term affordability.
- **Sustainable, healthy design.** Embrace zoning that encourages density, walkability, and accessibility; focus on specific health elements such as active staircases, efficient energy and ventilation systems, and natural lighting; offer affordable design options; and use off-site, modular construction methods and prefabricated materials.
- **Partnerships.** Engage new public and private entities entering the housing arena; encourage more employer-assisted housing; form strategic partnerships to reduce land costs; and leverage partnerships involving the public, private, and nonprofit sectors.



Manzanita Village co-housing in Prescott, Arizona.

The next phase of the initiative will include advancing a partnership with the city of Tempe, which has actively pursued an affordable and workforce housing agenda. Tempe, home to Arizona State University, has housing pressures related to its growing student population and worsening affordability for university staff as well as other workers in the community. While Tempe is one of the few transit-oriented communities in the area, those who most need access to transit are increasingly priced out of homes within walking distance of the rail lines. The city is addressing the issue through community engagement and data gathering to create a comprehensive plan on improving housing affordability. The task force aims to support the city's efforts and use its work as an example for other cities in Phoenix Valley and beyond seeking to address their affordable housing challenges.

In addition to co-chairs C.J. Eisenbarth Hager and Silvia Urrutia, the task force included the following local housing, urban planning, and finance experts: Terry Benelli, executive director, LISC Phoenix; Dean Brennan, principal, Project for Livable Communities; Stephanie Brewer, executive director, Newtown CDC CLT; Tom Hester, principal, Jacobs; Levon Lamy, housing and revitalization manager, city of Tempe; Maria Laughner, economic development program manager, city of Tempe; Brande Mead, human services program manager, Maricopa Association of Governments; Gloria Munoz, executive director, Housing Authority of Maricopa County; Sally Schwenn, Arizona market president, Gorman & Company Inc.; and Humphrey Shin, executive vice president, First Bank.

The legacy of inequitable land use and transportation decisions has contributed to rising health issues, economic disparities, and a general feeling of being left out felt by far too many. The ULI Sacramento task force led culturally inclusive conversations with the residents of Meadowview, a South Sacramento neighborhood, to develop a community toolkit designed to empower residents to engage in neighborhood decision-making more fully.

Sacramento

ULI SACRAMENTO TASK
FORCE CHAIRED BY
Jose Bodipo-Memba

Empowering Community and Building Trust in South Sacramento



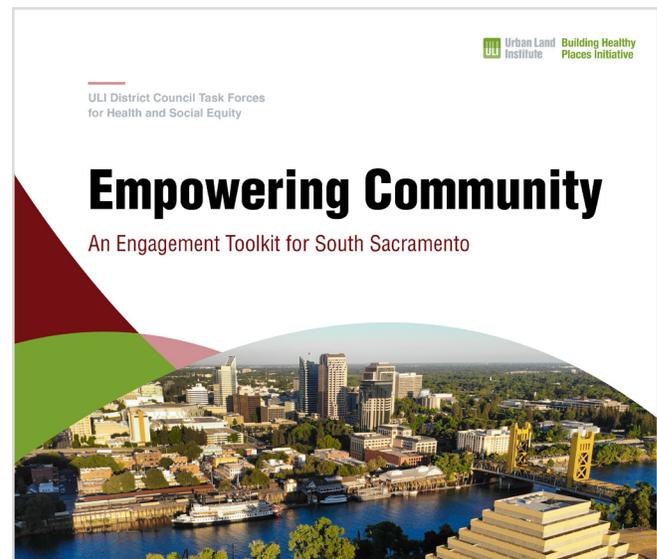
Though Sacramento was one of the country's hottest housing markets in 2021, residents of the city's underserved and underinvested neighborhoods are not seeing equal benefits from the changes.

The ULI Sacramento task force is promoting healthier, more equitable development by focusing on building trust with a long-underserved community. The group partnered with the Meadowview neighborhood of South Sacramento with an emphasis on lifting it up through community-led land use and transportation improvements.

The initiative built on the work of a 2018 ULI Advisory Services panel, which advised the city on opportunities for more equitable transit-oriented development to help boost use of two light-rail stations in South Sacramento. The panel's overarching recommendation—"Do projects with the community, not to the community"—carried over as the philosophy guiding the task force's work in Meadowview. Chaired by Jose Bodipo-Memba, ULI Sacramento chairman and director of sustainable communities for the Sacramento Municipal Utility District, the task force consisted of a cross-functional group of local health, urban planning, business, community, transportation, and economic development leaders.

The Meadowview neighborhood, while ethnically and culturally diverse, has suffered from years of underinvestment that has resulted in limited options for employment and affordable, decent housing, as well as a dearth of convenient and safe transportation alternatives, safe streets, high-quality schools, high-quality health care, and health-promoting amenities such as sidewalks, bike lanes, and parks. While residents want neighborhood improvements, many are distrustful of real estate and economic development proposals they view as overlooking their needs and leading to gentrification and eventual displacement.

Despite these challenges—made worse by the impacts of COVID-19 on neighborhood residents—the task force identified promising opportunities within Meadowview for infill development and activations, including retail, entertainment, community gathering places, housing, and social and cultural destinations. Given the residents' concerns about new development, the task force members concurred that the key to a successful, equity-focused transformation would be to ensure authentic community involvement, incorporate health outcomes into project design and creation, and leverage the neighborhood's diversity as a marketable asset and an economic development driver. The group's work is detailed in a report, *Empowering Community: An Engagement Toolkit for South Sacramento*.



The full ULI Sacramento task force report and companion resources are available at uli.org/taskforces.

During late 2019 and in 2020, the group engaged with nearly 600 neighborhood residents, including in-person and virtual meetings as well as surveys taken before and following the onset of the pandemic and during the protests for racial justice. The surveys showed that community members consistently prioritized job creation and training, affordable housing, youth programs/education, and safety.

Another key component of the task force's community engagement was to host an abbreviated version of UrbanPlan—ULI's popular urban design and development curriculum for high school students (as well as undergraduates and public officials)—at a neighborhood school. The task force felt that UrbanPlan could serve not only as an education opportunity for the youth, but as an effective outreach tool to overcome language barriers within a community with a high number of non-English-speaking residents.

UrbanPlan was introduced with the belief that the students would take lessons from the UrbanPlan experience back home and discuss them with their families—helping build community interest, momentum, and trust as a result of participation in the program. The one-day UrbanPlan for Youth session was highly successful, attracting 20 teens (the maximum capacity), and the event drew many neighborhood residents who learned through the planning exercise about the community-wide benefits of thoughtful development.

The task force's intensive community engagement yielded two types of takeaways: observations on improving the area's quality of life and observations based on the outreach process itself. Observations for community improvement include the following:

- Diversity and sense of community are Meadowview self-defined assets.
- COVID-19 reordered community priorities, with job creation/training being the top priority.
- Community members are uncertain about how to prioritize and achieve multiple neighborhood projects.
- There is untapped community leadership that is necessary to improve residents' engagement.
- Building trust is necessary for a productive dialogue with all community members.
- UrbanPlan should be expanded to reach more young people in the neighborhood.

Observations on the community outreach process include the following:

- Teams with cross-functional expertise are better positioned to advance project goals and outcomes.
- Multiple engagement methods tailored to different audiences increase participation.

The community engagement effort shaped the task force's development of three toolkits—for (1) development site activation, (2) project funding and budgeting, and (3) project approval—to help community members navigate planning, design, and development processes and bring to the community more neighborhood-oriented projects that achieve better health and social equity outcomes.

The development site activation toolkit was created for temporary placemaking as well as long-term uses. During the community engagement activities, residents raised numerous activation ideas for temporary uses, such as farmers markets, drive-in movie locations, and street soccer fields, but they did not understand how to transform their vision into reality. In response, the task force developed a site activation toolkit



Incorporating youth engagement into outreach plans is an effective strategy for building community interest, momentum, and trust.

with a step-by-step guide for identifying project champions and goals, setting a budget, selecting a site, communicating efforts, obtaining permits and licensing, conducting community outreach, and celebrating the kick-off. The task force noted that the temporary placemaking envisioned by Meadowview's residents could lead to long-term investments that are in line with community needs and desires.

The project funding and budgeting toolkit was developed to address the gap between opportunities identified for new development and revitalization in Meadowview and obtaining funding for projects that are aligned with community priorities. The task force provided a toolkit with steps for the budgeting process, including establishing goals and a budgeting scope; conducting community outreach and collecting community input; holding a community vote on the budget and communicating the voting results; implementing the project as budgeted; and collecting feedback to inform future budgeting decisions.

The project approval toolkit was developed to help empower community members to voice their needs during the planning and entitlement process, rather than after the approval process has been completed. This includes guidance on how to effectively participate in site identification, preapplication, entitlement application, and project reviews and hearings.

As part of its initiative, the task force also developed recommendations for city officials to ensure that community engagement is an ongoing, necessary component of land use decision-making going forward. Among the recommendations:

- Delegate a portion of the city's budget for participatory budget purposes.
- Engage youths in community planning and physical development initiatives.
- Partner with community groups authentically and equitably by leveraging technology and other methods to gather input from residents who cannot easily access public meetings.
- Engage with neighborhood residents and businesses on their plane to provide a level of comfort and cultural understanding.
- Train and empower residents to become community advocates.
- Effectively and regularly communicate progress on development projects in the neighborhood.

Having built the trust, ULI Sacramento is committed to continuing its relationships with Meadowview residents and public officials on improving the neighborhood. Subsequent planned activities include presenting a community-designed site activation plan to Sacramento City Council member Mai Vang, whose district includes Meadowview. This action would represent a key step in an ongoing effort to transform the area into a more vibrant, equitable, and healthier living environment.

In addition to chairman Jose Bodipo-Memba, the task force members were Bernadette Austin, acting director, UC Davis Center for Regional Change; Matthew Bryant, District 8 chief of staff, city of Sacramento; Dr. Flojaune Cofer, senior director of policy, Public Health Advocates; Adrian Engel, senior associate, Fehr & Peers; Allen Folks, director of planning and design, Ascent Environmental; Trina Gonzalez, vice president for policy, California Hospital Association; Monica Hernandez, director of innovation and partnership, Sacramento Area Council of Governments; Allison Joe, District 5 chief of staff, city of Sacramento; Debra Oto Kent, founder and chief executive officer, Health Education Council; Joanna Mack, designer III, Mogavero Architects; Kriztina Palone, workforce development manager, city of Sacramento; Kendra Macias Reed, deputy director, Franklin Boulevard Business District; and Ashlee Webb, sustainable communities representative, Sacramento Municipal Utility District.



Temporary or permanent site activations, such as community gardens, can transform vacant lots into vibrant public spaces providing a wealth of resources.

Tampa mayor Jane Castor set the bold goal of adding 10,000 new housing units—a mix of affordable and attainable—by 2027. ULI Tampa Bay assembled a panel of experts to advise the city on how best to reach the target while emphasizing inclusivity and equity.

Tampa

Achieving Tampa’s Attainable Housing Goals

ULI TAMPA BAY TASK
FORCE CHAIRED BY
Keith Greminger

EXPERT PANEL CHAIRED BY
Jess Zimbabwe



Tampa is looking to “attainable housing” as a tool for addressing the housing crisis. In contrast with affordable housing, attainable housing is typically not managed by government agencies or restricted to people below specified incomes.

ULI Tampa Bay convened a panel of experts to advise the city of Tampa on how best to improve housing options for people of all incomes. The group was tasked with building upon the foundational recommendations outlined by Tampa mayor Jane Castor in her report *Transforming Tampa's Tomorrow*, which sets a goal of adding 10,000 new affordable and attainable housing units in the city by 2027.

Under the leadership of Tampa mayor Jane Castor, increasing the availability of attainable housing is a particularly pressing priority. Attainable housing is market-rate housing that is affordable to lower- and moderate-income residents. In contrast to affordable housing, attainable housing is typically not managed by government or restricted to people below specified income thresholds.

According to the U.S. Census Bureau, the Tampa Bay region is one of the nation's 10 fastest-growing metropolitan regions in terms of population; it is rated the sixth most favorable investment market in the United States by *Emerging Trends in Real Estate® 2021*. As a result, development pressure is high, which is further constraining affordability.

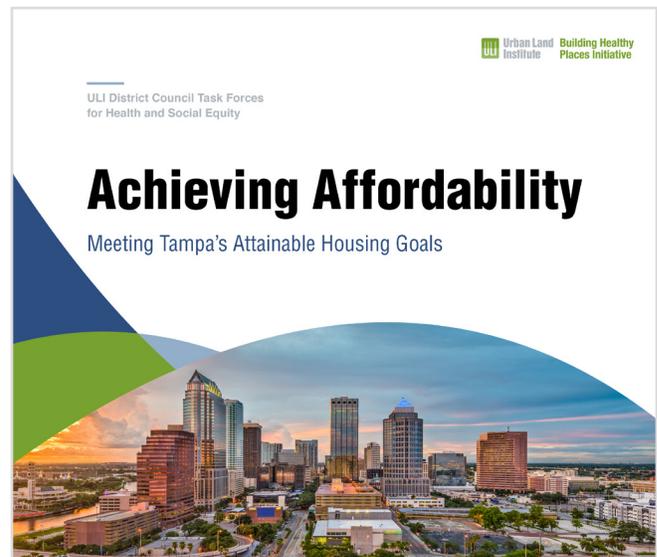
Given the city's surging growth and ambitious housing goal, a major contribution of the panel was to reinforce the need for the city to think holistically, be bold, and be prepared to address numerous aspects of the plan at the same time. The panel, chaired by Jess Zimbabwe, executive director at Environmental Works in Seattle, consisted of ULI members from across the nation who specialize in attainable housing, urban planning, finance, and development. The group met virtually for eight days and was assisted by a task force of local urban design and real estate leaders.

Although the panel recognized that creating conditions for the development of attainable housing is a challenge, it began its work with the belief that Tampa should ensure that the benefits of its growth are realized by all residents, particularly communities of color, and that the city should commit resources where needs are greatest and prioritize neighborhoods that have been historically underinvested.

To identify priorities, the panel examined how the city could best leverage portfolios of public properties in support of Tampa's new Community Land Trust (CLT) program to provide lasting affordability, with an emphasis on multifamily and mixed-use opportunities and on promoting equitable and healthy neighborhoods.

The panel also explored development of a land acquisition framework for specific sites within targeted communities to achieve maximum impact; effective and efficient developer incentives; data and mapping tools to inform decision-making and track progress; and creative ways to include more minority and women-owned business enterprises in the development process.

Building upon Tampa's recent housing report, and numerous interviews with public- and private-sector leaders and other community stakeholders, the panel made comprehensive recommendations to Mayor Castor and her staff on ways to enhance the city's housing initiative by making it more flexible, scalable, replicable, and more reflective of housing needs throughout the community. The recommendations are explained in a new ULI Tampa Bay report, *Achieving Affordability: Meeting Tampa's Attainable Housing Goals*.



The full ULI Tampa Bay task force report and companion resources are available at uli.org/taskforces.

Foremost among the panel's recommendations is the need for a senior administration position focused exclusively on housing, such as a "chief housing officer." Panelists advised that the individual in this role be given the authority and resources to pursue the city's housing goal and collaborate with various city departments and nongovernmental agencies to expedite attainable housing production. The city launched a national search to fill the role.

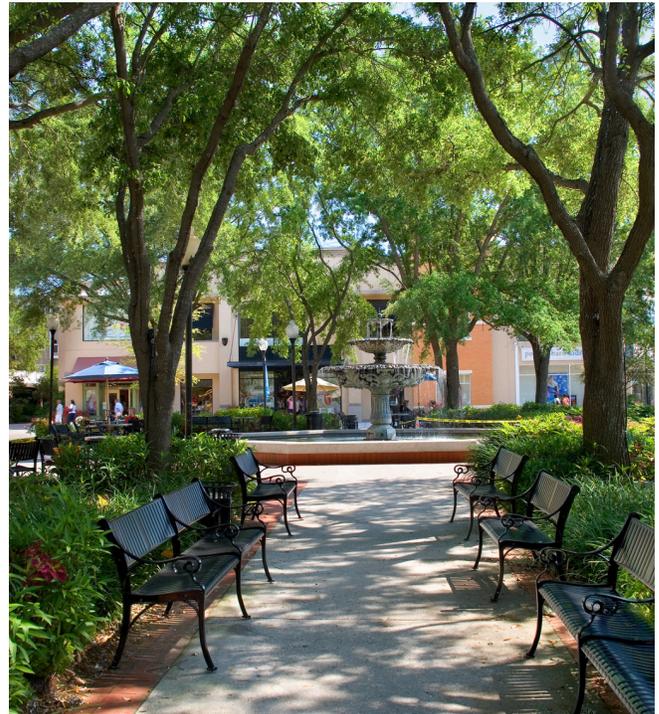
Other key recommendations included the following:

- Conduct a thorough, data-based analysis of attainable housing needs to identify existing inventory and geographic need.
- Lower the costs of adding 10,000 housing units by 2027 by using existing tools such as public land contributions, impact fee abatements, tax abatements, and parking waivers.
- Preserve existing attainable housing with a strategic, scalable strategy that is incorporated into an annual housing needs assessment.
- Implement anti-displacement strategies with measures such as property tax relief, rent relief, eviction and foreclosure prevention, as well as equity-sharing programs and the forthcoming CLT program.
- Increase access to capital for the CLT as well as other nonprofits to fund land acquisition and develop attainable housing.
- Remove and reduce impediments to attainable housing creation.
- Cultivate public/private partnerships to help fill in funding gaps for housing.
- Adopt a multipronged strategy for building partnerships that targets nonprofits, major employers, and anchor institutions.

While the city's downtown was transformed into a more walkable, mixed-use, denser environment during the previous mayoral administration, the Castor administration has the difficult task of figuring out how to similarly transform the rest of the city's neighborhoods in ways that accommodate demographic shifts and new population growth while preserving neighborhood character and helping existing residents stay in neighborhoods and benefit as they are incrementally improved.

The panel focused on how to frame the housing initiative in terms of community engagement and social equity, noting that the city must continue to emphasize a highly inclusive and equitable approach. In evaluating how best to do this, panelists noted that in some neighborhoods, an organizational infrastructure already exists; whereas in others, the city will need to conduct more direct engagement work and capacity building.

Equitable development and attainable housing options have long been stifled in Tampa by the city's restrictive, single-family-only zoning that exists in many neighborhoods beyond the downtown. The panel offered several suggestions to achieve more equitable outcomes, such as identifying and cultivating community champions; implementing a comprehensive, inclusive community engagement process; creating more capacity building in neighborhoods that lack an existing organizational infrastructure; and using tools such as the CLT to generate small-scale wealth-creating opportunities for communities of color.



Making historic neighborhood development patterns legal once again is a key strategy for promoting equitable neighborhood development.



Leveraging partnerships is essential for addressing the housing affordability crisis, not just in Tampa, but in towns and cities across the United States.

The group urged the city to implement policy changes and invest in ways that lift up underinvested areas as well as open up more neighborhoods to people in a broader income range. It suggested the following strategies to increase attainable housing while encouraging more equitable neighborhoods:

- Relegalizing previous neighborhood development patterns to encourage more dense housing designs and a greater mix of housing with retail such as neighborhood stores;
- Building “missing middle” housing (housing for people with moderate incomes) that is based on that type of housing that already exists in the city;
- Expanding the availability of ADUs on an incremental basis or through a pilot program;
- Training residents of disadvantaged areas to lead their own infill development; and
- Promoting access to capital for community-led development efforts.

In addition to panel chair Jess Zimbabwe, other panelists were Charles T. Brown, senior researcher, Alan M. Voorhees Transportation Center, Rutgers University, New Brunswick, New Jersey; Christopher Coes, principal deputy assistant secretary for transportation policy, U.S. Department of Transportation, Washington, D.C.; John Hodgson, founder and president, The Hodgson Company, Sacramento; Eric Kronberg, principal, Kronberg Architects + Urbanists, Atlanta; James Nozar, chief executive officer, Strategic Property Partners, Tampa; Amanda Rhein, executive director, Atlanta Land Trust, Atlanta; Phillip Smith, president, Framework Group, Tampa; and Tanya Stern, deputy planning director, Montgomery County, Maryland.

ULI Tampa Bay’s task force members included Keith Greminger, principal, Stantec; Taryn Sabia, director, Florida Center for Community Design and Research, University of South Florida; Taylor Ralph, president, Real Building Consultants; and Tyler Hudson, partner, Gardner Brewer Martinez-Monfort.

The task force initiatives yielded common themes and valuable takeaways that can inform future efforts by other district councils as well as other ULI member networks and global programs that aim to foster healthier, more equitable, inclusive, and ultimately more successful communities.

Change for Good

Six Takeaways for Building Healthy and Equitable Places

As important as their local successes, the four task forces yielded common themes and valuable takeaways that reinforce findings from health- and equity-related work by ULI and other organizations. Collectively these takeaways can inform and inspire future efforts led by other ULI district councils and their members in the advancement of the Institute's mission:

SHAPE THE FUTURE OF THE BUILT ENVIRONMENT FOR TRANSFORMATIVE IMPACT IN COMMUNITIES WORLDWIDE.

Key program takeaways include the following:

1

Ground Projects In Health and Social Equity

Applying a specific health and social equity lens uncovers opportunities for impactful changes to real estate and planning practice. In each case, task forces sought to foster policies and development projects that serve people in a broad income range, encourage engagement by a more diverse group of residents, and cultivate more stakeholders committed to providing a better quality of life for all people in the community. For instance, by applying a health lens to its discovery process, **ULI Chicago** uncovered the specific need to address air quality and mold abatement in future basement-level ADUs. As all the task forces learned, centering health and social equity upfront is the first step toward achieving those desired outcomes.

2

Identify Challenges and Create Solutions with Residents

Multiple methods of community engagement and careful cultivation of allies, including young people, are necessary to achieve change. **ULI Sacramento** effectively engaged key businesses, real estate professionals, elected officials, and key community leaders through individual and small group meetings. However, this approach was not as successful with grassroots community leaders, in part because the task force was introduced to many stakeholders too late in the project.

The group's efforts to connect with the community were more successful with the rollout of UrbanPlan in the neighborhood high school. The task force helped design the curriculum not only as an educational opportunity for neighborhood youth, but also as an outreach tool to overcome language barriers within a community with a high number of non-English-speaking residents. Once engaged, the students expanded the project's reach when they talked with their families about all they learned and shared how they might get involved. As a result, the task force recommended incorporating multiple outreach pathways into grassroots-level projects.



Physical distance is no longer a barrier to communication. The COVID-19 global pandemic proved the power of readily available technologies to connect experts and communities in ways never before possible.

3 Take Time to Listen and Learn from the Outside Experts

In addition to engaging with hometown stakeholders and resident experts, involving geographically dispersed leaders can inspire and infuse communities with fresh ideas and new perspectives. **ULI Tampa Bay** assembled a virtual panel of professionals from across the United States to advise city leaders on plans to increase the availability of attainable housing. As a group of outsiders, the panel was unencumbered by local politics or traditions. Panel members’ freedom to be bold continues to generate excitement locally, and the city is already moving forward with several of the panel’s key ideas. Likewise, **ULI Arizona** infused its task force with perspectives from a variety of outside speakers, including Christopher Ptomey, executive director of ULI’s Terwilliger Center for Housing, and Mike Kingsella, executive director of Up for Growth.

Silo busting and bold thinking were not limited to Tampa and metro Phoenix; all task forces sought to act on forward-thinking ideas and establish new partnerships between health and real estate, between public and private sectors, between city leaders and community groups, and within the cohort of participating district councils.

4 Maintain a Vision while Staying Nimble

Defining a problem statement upfront and committing to an executable scope of work can facilitate rapid project execution and momentum around resulting outcomes. For instance, **ULI Chicago** and partners started with a clearly defined problem statement and a detailed scope of work. Armed with clarity of purpose and a persistence of vision, the group move rapidly from inception to recommendations to inspiring adoption of the city’s pilot program. **ULI Tampa** was forced to abandon initial plans because of the defeat of a local transit bill. Organized and at the ready, upon learning of the mayor’s need to refine the city’s vision for affordable housing, Tampa easily made the pivot to assist.

Staying nimble also means respecting the culture, capacity, and individual needs of local teams, while meeting overarching program goals within the timeline. For instance, rather than develop a report template, teams determined how to best tell their story. The result is a library of four task force reports, distinct in length, tone, and media, each reflecting the work done in each city.



The ULI team worked in the community as part of its commitment to build trust and credibility with neighbors.

5 Work with a Variety of Partners

Tapping cross-functional expertise and forming partnerships positioned teams to build trust and advance project goals and outcomes. For example, **ULI Sacramento** assembled a task force composed of members with an array of professional backgrounds, which helped ULI expand its network, engage a larger group, and build trust with the community. Based on this experience, the task force recommended that future district council working groups as a policy be multidisciplinary and diverse.

6 Identify Funding Sources to Implement Ideas

Identifying and leveraging available funding is critical for moving from ideas to adoption. **ULI Arizona** partnered with Vitalyst Health Foundation, which provided additional funding to support the task force's initiative to increase affordable housing in metro Phoenix. The district council's partnership with a health-focused organization helped amplify and spotlight the clear connection between access to affordable, decent housing and maintaining good health.

Conclusion

The district council initiatives featured in this report add to ULI's growing body of work related to the connection between health and social equity and thriving communities. Clearly, health and social equity are playing increasingly important roles in what is built, where it is built, and why it is built. These initiatives also remind us that, at its core, ULI's work is not about buildings, but about people—improving people's quality of life through thoughtful urban design and development. This impressive legacy stems from the commitment of the Institute's members to advance ULI's mission, which is to shape the future of the built environment for transformative impact in communities worldwide.

ULI's district council members are industry leaders, and they are doers—doers who form partnerships with other community leaders whose goals and interests align with ULI's mission. As a result, it comes as no surprise that the success of these initiatives is largely owing to the leadership of each group:

- ULI Chicago task force co-chairs **Todd Berlinghof**, partner at commercial development firm Hamilton Partners in Chicago, and **Molly Ekerdt**, vice president at the Preservation of Affordable Housing organization in Chicago;
- ULI Arizona task force co-chairs **C.J. Eisenbarth Hager**, director of healthy communities at the Vitalyst Health Foundation in Phoenix, and **Silvia Urrutia**, founder and chief executive officer of U Developing LLC in Phoenix;
- ULI Tampa Bay task force chair **Keith Greminger** and expert panel chair **Jess Zimbabwe**, executive director at Environmental Works in Seattle, who, along with the panel, worked closely with leading ULI Tampa Bay members; and
- ULI Sacramento task force chairman **Jose Bodipo-Memba**, ULI Sacramento chairman and director of sustainable communities for the Sacramento Municipal Utility District.

Many thanks are owed to these dedicated leaders and all of the task force members and panel participants for donating their time and expertise to make this a productive endeavor with real, lasting impact.

In addition, much credit is due to ULI's team of health and transportation equity-focused advisers: **Charles T. Brown**, senior research specialist with the Alan M. Voorhees Transportation Center at Rutgers University in New Brunswick, New Jersey; **Tiffany Pertillar**, co-owner and chief operating officer, Epic Health Solutions, Washington, D.C.; and **Robyn Taylor**, health equity consultant at the National Association of Chronic Disease Directors in Decatur, Georgia. They were immensely helpful in guiding the ULI program, catalyzing the district council initiatives, as well as the work of each district council, and they have been particularly adept at helping ULI navigate sensitivities and equity issues related to the social justice movement and the COVID-19 pandemic. We offer special thanks to these extraordinary individuals.

The project would not have been possible without the leadership of ULI staff, including **Cindy McSherry** and **Swasti Shah** at ULI Chicago; **Kristen Busby** and **Deb Sydenham** at ULI Arizona; **Siobhan O'Kane** and **Jenna Wylie** at ULI Tampa Bay; **Mary Sater Clementi** at ULI Sacramento; **Christopher Ptomey** and **Rosie Hepner** at ULI's Terwilliger Center for Housing; and **Elizabeth Foster**, **Billy Grayson**, **Sara Hammerschmidt**, **Rachel MacCleery**, **Matt Norris**, **Diana Schoder**, **Reema Singh**, and **Ellie White** of ULI's Center for Sustainability and Economic Performance.

Change for Good reaffirms a familiar adage about the Institute: "ULI is only as strong globally as it is locally." Time and time again, this has been borne out by our members working at the local level, offering their considerable expertise to shape land use decisions that make a positive difference in how our communities grow and evolve. This report exemplifies just that—ULI's long-cherished tradition of sharing knowledge and lessons learned for the betterment of our members, the industry, and the built environment. Every local success can spark successes in other localities, all of which contribute to greater impact by the Institute nationally and worldwide.

ULI is grateful for the many residents and stakeholders in Chicago, metro Phoenix, Sacramento, and Tampa whose perspectives informed and inspired this process. Special thanks to the Robert Wood Johnson Foundation for making this effort possible.



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