

Denver TOD

Economic and Market Study

Survey Results

Transit Induced Growth

July 2007

- Survey sent out to 50+ experts in Economic Development / Business, Transit and Land Use Planning from regions with established rail systems and national experts in TOD/Site Selection

<u>Regions</u>	<u>National Experts</u>
San Francisco Bay Area	ULI
Washington, DC	IEDC
Portland	APTA (Land Use and Development)
Dallas	FTA
San Diego	Public Policy/Transportation Institutions
Salt Lake City	Universities
Minneapolis/St. Paul	Consulting Firms

- Received more than 25 responses
- Survey focused on addressing central question of does investment in transit induce new growth to a region that otherwise would have not occurred without transit or is it a redistribution of growth, or some combination
- Respondents viewed issue as an important topic; however, one that has a limited amount of research completed

1. *Do you think the investment in transit (in your region or elsewhere) induces new growth (e.g. business location, new jobs, new residents) to the region that otherwise would not have occurred in the region without transit or does transit investment represent a redistribution of growth within the region, or some combination of both?*

Summary Results

- **Both a Redistribution of growth with New Growth under certain conditions**
- **New growth with a true comprehensive transit system**
- **New growth due to transit is a minor consideration in overall regional growth patterns**
- **Limited data on this issue**

Economic Development/Business Community

- Transit investment has done both in Salt Lake City; largely induced new growth and slightly redistributed growth.
- Combination of both.
- Gut feel is that we have probably had redistribution within, rather than new growth in the region, due to the Hiawatha line
- I don't have any data that indicates one option over the other. The literature (esp. Boarnet and Guiliano), however, suggests highway improvements do not attract new growth to a region—they just redistribute growth within the region. That same literature indicates that transit has the effect, but at a smaller scale, i.e., that redistributed growth occurs in a smaller footprint around station areas compared to the growth attracted by a highway.
- Do not see transit being a key determining factor in causing locations to the area. Companies move here for other reasons. An increasing number of companies consider transit once they have made the decision to locate here, or when moving around within the region. It is important in that regard.
- Transit Investment induces new growth. 1 new metro stop, in-filled into the existing system (NY Ave), has induced 4 new office buildings around it in the past three years and will induce 2500 housing units and in the coming seven years. In Tyson's Corner, VA where four new metro stops are planned there are nine new office and residential towers planned around just 1 stop – including 1,300 new condos.
- Transit does both.
- Combination.
- Both. New growth (jobs and residents) has appeared with the opening of the streetcar in Tacoma in 2003 and speculative new growth in the South Lake Union district in Seattle even before the streetcar opens. Elsewhere it has been a redistribution of growth, particularly with relocation or expansion of public facilities near transit

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Transit Providers

- Yes. “Livability” is Portland’s economic development calling card. Our transit system widely recognized as a key to maintaining livability.
- Redistributes growth and changes the type of development; also some new occurs. A combination.
- Combination of both. Good transit is cited as a reason for business to locate in our region. Commercial realtors also market properties with good transit access within the region.
- Short-term, transit investments result in new growth only as it brings new dollars into the region (federal match, or private \$ for the transit project). Long-term, transit investments may make the region more competitive, and bring new jobs, dollars, and people -- growth that would otherwise have gone to some other region.
- BART did to a limited degree but all their surrounding property is surface parking and they have a poor unwritten rule that for any developer to develop they would require each parking space to be replaced. I have proposed that in lieu they should require the developer to start up a bus shuttle service during peak since about 80% of BART riders access BART during that time.
- The development that has occurred around transit is different than what would have normally development. It’s taken on a more innovative twist rather than typical development.

National Experts

- Yes I do – especially if the region is in a growth mode and constrained by transit issues such as an Atlanta or a Denver. The redistribution issue depends on the link to land use planning and this strength.
- There may be some induced new real growth but it is probably a minor consideration. It would depend on the profile of the projects, overall economic health etc. A project may impact the reputation or perception of a region that may in turn impact job or person attraction. To a certain extent the impact will depend on how unique the initiative is. For example if every city has some TOD developments their presence will not differentiate between areas.
- Both. Redistribution for sure because it offers products that are usually underprovided. New growth comes if there is truly a comprehensive system, or promise of one. A single corridor or two generally aren’t perceived to offer enough promise of mobility and quality of life to be material.
- If done well, I think TOD can induce additional population and business growth by increasing regional productivity and competitiveness, and creating more residential options that meet market demand that would otherwise not be available in a region.
- For smaller markets (e.g. Dallas, Salt Lake, Denver) primarily redistribution; larger markets (e.g. DC, Chicago, New York) more premium associated with transit investment
- I’ve seen no evidence to believe transit creates new growth in any region. There is lots of evidence that transit can redirect where growth occurs within a region in combination with supportive public policy. Portland and the Washington, DC region are well documented examples. We well understand the numerous benefits. But the question of induced growth seems to go to transit’s impact on larger forces shaping growth in regions. Are regions rich in transit growing faster than they would have otherwise or are they simply growing better? The presence of 29 Metro stations in the District of Columbia has not caused DC to better compete for growth within the region. If transit induced growth one might think a central city like DC as the focal point of an approximately \$12b transit investment would have seen more growth. Yet since Metro opened growth in DC moved in a different direction. Certainly Arlington County and the Rosslyn Ballston Corridor have done a fantastic job of capturing and focusing growth. Yet places like Tysons Corner have captured

- much more growth with no transit. I'd certainly rather live in Arlington than Tysons, but is that attraction causing the transit rich DC region to out perform Houston?
- Both, primarily redistribution

2. *If transit induces new growth to the region, what is the percent of this growth that you think is transit induced (e.g. 5% of new growth is transit induced)?*

Summary Results

- **Very little hard data on this issue**
- **Anecdotally, ranges from 2% to 50%**
- **Depends on growth patterns of region (is it a fast growing or slow growing region?)**

Economic Development/Business Community

- Anecdotally, perhaps 50%
- Hard to say, and I don't have any solid data on this.
- I have not done enough research to calculate this. It can be done but I can't do it off the top of my head.
- This varies from year to year as transit investments and related growth is lumpy. I'd guess around 8%.
- 2% to 4% of employment growth is at least partially transit induced.
- Less than 5%

Transit Providers

- 20%
- Since transit is part of overall transportation and transportation is only one of many factors I'd say 5% or less.
- The short-term growth can be calculated fairly accurately, based on the dollars, using regional economic models. The long-term growth can only be an educated guess, at best.
- MTC our Regional body that controls all the US and State funds to the Region has finally come up with criteria of X residential units with in ½ mile of major transit extensions. You may want to contact them.
- To be conservative, it's about 5-10%.

National Experts

- What are you measuring? I estimate 7% - 10% - includes growth that chose to stay and not go elsewhere due to transit enhancements.
- In fast growth areas no where near 5%. I suspect that the share of new DUs in TOD is a few percent on a regional basis and the share of those that are induced from outside the area is a modest share. Highly dependent on overall growth. You can calculate the maximum share by assuming 100% induces if you know the share of TOD/total new DUs.
- 10-15%
- It varies. In most communities, TOD represents a minor portion of total new development, and only a portion of this will be induced (i.e., a net increase). This portion probably

- increases over time. If 10% of current development is TOD and 20% of this is induced, this represents 2% of total development, which may increase to 3-4% after a few years as rail transit becomes more established in the market.
- Depends on region, relative amount of investment, transit travel advantages, public policies, etc.
3. *If transit induces new growth to the region, why do you think this growth was induced from the transit system? In other words, what about the transit system prompted this net new growth to occur?*

Summary Results

- **Improved accessibility, quality of life, commuting times**
- **Transit indicative of progressive region which can be a plus in the eyes of businesses looking to locate their companies**
- **Offers new locational opportunities for jobs**

Economic Development/Business Community

- Accessibility to downtown area, university area and southern suburbs.
- In any region experiencing growing VMT and traffic congestion and/or air quality problems, the presence of a robust transit system will help to mitigate those problems in the eyes of employers considering a move to the area. High quality transit also indicates lower transportation costs for employees, as well as higher mobility and quality of life.
- People are looking for ways to reduce their commutes and reclaim time in their busy lives. This is driving huge demand for housing around metro stops.
- Transit brings state and federal dollars into the region, creates growth thru agglomeration effects & attracts investment by creating good proximity relations.
- Some firms looking to relocate view transit as a big plus – viewing it as an indication of a progressive region, one in which urban problems are being directly confronted. In addition, in regions where traffic congestion is severe, some firms seeking to relocate identify transit as a key means for workforce mobility. In both of those cases, it is more than just redistribution.
- Visibility of streetcar with fixed rail route is more visible and tangible than other modes, particularly in building or rebuilding neighborhoods. Also easier to market development nationally with “streetcar” buzz.

Transit Providers

- The high quality of our transit system attracts a broad socio-economic ridership.
- High capacity transit supports infill developments, city codes encourage ground floor retail in many of these. Transit changes the real estate market and enables more dense developments. Some portion of this new housing activity would have occurred on the urban fringe or in suburbs instead but would have been of a completely different type/ urban form.
- Transit is part of an environmental sensibility and overall livability that are valued in our region. Many companies locate or expand here because of those broader regional values.

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- IF the transit investment is large enough to be significant to mobility and to travel/housing/job location choices, it can improve lifestyle by reducing travel costs and time; help manage congestion (which is important to business); and offer new locational opportunities for jobs. This is what makes a region more economically competitive.
- Because of the growing congestion. SF area has the second highest congestion, however, when congestion increases Bart use increases.
- Transit has allowed people to access areas that they may not have driven to, especially from the suburban areas. Plus more people want choices in what activities they do as well as where they live.

National Experts

- Access to employment base. Quality of life. Commuting times.
- Transit's presence can change the perception of the region and this can impact growth. If transit labels an area as progressive it could impact growth. This induced growth may not have anything to do with TODs of actual transit use.
- The growth was attracted by the perception that it will be economically healthier in the long run, and be an attractive place for workers to locate.
- High quality transit service can provide (directly and indirectly) several significant economic benefits: improved accessibility, reduced infrastructure costs (particularly parking), reduced consumer costs (which shifts consumer spending to goods with more regional inputs, benefiting the overall economy), reduced accident costs, agglomeration economies, and responding to consumer demand (many people want to live and work in compact, multi-modal urban neighborhoods and may move if such options are unavailable in a region). To the degree that TOD leverages these benefits it makes a region more economically competitive and attractive.
- Depends: peer cities, level of transit investment, policies related to transit, level of congestion

4. *If transit induces new growth to the region, how much of this net new growth do you think occurs around the transit stations (e.g. within 1/2 mile of the station)?*

Summary Results

- **Hard to say**
- **Depends on the link between transit and land use**
- **Varies according to respondents (from less than 5% to 80%)**
- **Depends if stations are located in growth areas**
- **Depends on the degree to which TOD provides benefits that are unavailable elsewhere in region**

Economic Development/Business Community

- Salt Lake City's TOD has not been immediate, but we are now (5 years later) beginning to see more growth within 1/2 mile of stations
- Hard to say. I think some of the influence merely helps bring businesses to the region, even if they and their employees don't actually use the transit system. Some, on the other hand, will

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- see the system as a direct benefit to their employees, and will seek sites close to transit stations for easy access to the system.
- We will have both types of growth. I anticipate 20% of new housing will be developed within a half mile of a metro stop – but I have not studied this enough to be confident in the number.
- The bulk of new growth is due to the initial construction. Less than half is station-related.
- 20%
- Depends on mode: Streetcar – significant; LRT – some; Bus –significant at multimodal transit centers, otherwise minimal; Commuter Rail - minimal

Transit Providers

- 5%
- 80% (20% can occur further than ½ mile if PNRs or really strong bus lines exist; other distant development changes are redistributions of growth)
- Downtown Seattle and downtown Bellevue are two of the areas best served by transit and they are both seeing significant office and retail growth. Growth is also occurring near the Northgate transit center. So the majority of transit induced growth to the region is probably occurring in areas within ½ mile of our downtown bus tunnel and Bellevue Transit Center
- Probably very little. Most of the new growth around stations will likely be redistribution within the region. Induced growth is likely to be spread around the region.
- Unfortunately we do not have Regional Planning and all the communities have to be convinced the sprawl advocates for TODs.
- About 5-7% has occurred with the ½ mile of the station. There has been secondary developments within a 1 mile radius.

National Experts

- Depends on the link between land use and transit – 40% is a guess.
- Employment growth may occur near stations if stations are in growth areas. Usually there are stations in the CBD and usually the CBD attracts 5-15% of new jobs. Throw in lines in active corridors and by default some of the development will be around transit. On top of this proportional share impact there may be a slight bias to location near guideway transit. There is little evidence that location near transit is premised on accessibility advantages – more an issue of choice, contingency value of alternative mode or perception and incentives.
- 20-30%
- It varies, depending on the degree to which TOD provides significant benefits that are unavailable elsewhere.

5. *How important do you think the presence of a transit system (in your region or elsewhere) is a criteria that businesses look at when deciding to move to a region and/or expand within the region?*

Summary Results

- **Varies from not a significant factor to of paramount importance**
- **It may be a factor in site selection depending on circumstances**
- **More important among businesses that employ the demographic which may be more inclined to use transit (e.g. young professionals)**
- **Important if it is comprehensive and well used transit system**
- **Not on many CEO's radar screens when making corporate site selection decisions**

Economic Development/Business Community

- Of paramount importance. I believe it is one of the key drivers for many business decisions.
- I think the importance of transit as a criterion for business relocations is growing, especially as gas prices rise, and congestion and air quality problems become more pronounced in some urban areas.
- Only marginally or indirectly. Depending on the business, the quality of life can be important in making location decisions. To the extent that rail transit signifies some sort of quality of life indication, it might have some impact on location decisions.
- Not a significant factor in the decision to move to a region. But, once a region has been selected transit is considered a plus when looking at various sites and buildings.
- Very important. Especially if they employ the 20-35 year old crowd which demonstrates much higher mass transit usage.
- It's not determinative but still quite important especially to business expansion decisions.
- Depends on the business, overall it is notable but not significant.
- Very – tracks are strong commitment giving certainty

Transit Providers

- Transit is an element in a “quality of life” package that is very important to some business location decisions.
- I think it is a factor many consider but not the overriding consideration.
- It is increasingly becoming one of several criteria businesses look at. (They tend to look at overall mobility and transportation, and the transit system is just one of the factors in that.) It is also a factor in livability or lifestyle effects that businesses look at.
- Check with our MTC on this.
- It is becoming an issue with the congestion on the roadways, the price of gasoline and the air quality issues.

National Experts

- Can be very important

- Currently there is some perception value as high energy costs and sensitivities regarding congestion may impact the appeal or image of a community.
- Very important IF it is a comprehensive and well used system.
- Overall, I think it is a minor factor. However, if rail transit delivers significant benefits, increasing employment accessibility and leveraging more compact, walkable, multi-modal communities where residents and employees own fewer cars and drive less, and more economic activity is concentrated in attractive centers, it can have a major impact.
- Not on CEO's radar screen when making corporate site selection decisions
- If there was an argument for induced growth it would be as part of a "quality of life" package. I think you can argue that the complete package of transit and land use controls in Portland has helped to make it a desirable place to live and that there is a quality of life attraction. Does that make Portland grow faster than other western cities? Or simply to growth differently. The attached CEO's for Cities Report helps to make that point about the attractiveness of metro areas to the young and educated. I suppose Richard Florida makes a similar point. Atlanta certainly was a poster child in the 1990's for what happens if growth gets out of control - people chose not to invest there. But Atlanta seems to be back and its transit system is worse than it was in the 1990's - still under funded, still not serving the growth areas in the region and smaller in terms of service hours and staff than it was.
- The last decade has seen record levels of transit expansion and more new investment around transit than anytime in recent history. Central cities are back in a big way (with and without transit). Yet everything I've seen out of Brookings and other observers of metropolitan trends seems to also indicate larger trends are underway that our cities are continuing to spread out and lose market share. If transit induced growth in a region wouldn't that counteract some of these trends? Or if there is induced growth is it so small that on a metropolitan scale it does not register in terms of broader trends?

6. *Do you know of any anecdotal information from developers, businesses, or others indicating why the transit system prompted them to locate in and/or expand within the region? Please be specific if possible.*

Summary Results

- **Limited amount of hard data available, mostly related to rent and/or land value premiums associated with TOD**
- **Selected developers looking at TOD sites**
- **Anecdotal information is limited, but there are examples (Bellsouth in Atlanta, Boeing in Chicago)**

Economic Development/Business Community

- Several new housing developments have grown along the university line. New retail development with demographics of transit users purchased land along potential light rail line.
- Don't know of any specific examples.
- None that would be true new locations to the region. Other factors drive the decisions, with transit being a secondary consideration.
- No, I don't.

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- Tacoma downtown revitalization – streetcar/light rail was key. Expansion of Univ. of Wash. Campus in Tacoma, additional housing, redevelopment of underutilized industrial buildings

Transit Providers

- Yes.
- Yes. In-fill developers and real estate brokers are speculating and/or actually putting in new developments along a light rail line still under construction in Seattle. High levels of this activity are occurring in Rainier Valley. Tacoma Link light rail / streetcar line has coincided with a dramatic downtown renaissance. Retailers and political leaders there attribute it to the Link service. Business owners there are changing opening hours to capture PNR users.
- In the Northgate area (Seattle), Simon Properties is expanding their retail mall and doing so in part because of a shared use parking agreement with Metro Transit. Shared use park and ride was even more critical to a cinema/housing expansion across the street in the Northgate area.
- Anecdotal information is somewhat suspect, but there is some. Several years ago, Boeing moved its corporate HQ from Seattle to Chicago, and reportedly gave good transit as one of several reasons for the change.
- Holliday Fenoglio Fowler LP closed on the sales of four buildings near DART's Mockingbird and Lovers Lane stations in 2003. "Many investors have come to look at proximity to the DART light rail stop as offering a competitive advantage for their properties," the brokerage firm's senior managing director told *The Dallas Morning News*, adding, "If you look at the buildings that are directly on the rail line, they have had higher occupancy and effective rents."
- These dramatic new additions to the landscape are generating plenty of excitement among local cities, developers and the public. And now the first trickle of urban pioneers is starting to give way to a landslide. One of those leading the way in smart growth is Richard Howe, the developer behind 15th St. Village, a four-building complex with townhouses and condominiums near DART's Downtown Plano station. "The transit village is a great example of the new urbanism, and DART is obviously an integral part of that," says Howe. "DART is definitely one of the reasons I decided to build where I did, and it's a big selling point with our buyers; it's an incredible value proposition."
- Downtown Dallas properties likewise benefit from proximity to transit. "The people who live downtown are looking for urban living," Nancy Hormann, formerly with the Central Dallas Association, told *The Dallas Morning News*. "If we didn't have the light rail, it wouldn't be as urban as it is."
- Robert Shaw, Columbus Realty Partners, who built Eastside Village adjacent to Downtown Plano Station and a second phase nearby, agrees. "I think everyone now generally recognizes that building near transit is a big positive. It's like waterfront property - it's physically limited and can't be duplicated just anywhere."
- The Adam's Mark Hotel represents an investment of more than \$150 million by HBE Corp., which converted the former Southland Center in one of the most expensive real estate projects in the CBD. The DART Rail stop at the hotel's front door is the key. "DART is the reason we did the project," said Fred Kummer III, general manager of the 1,900-room hotel, the largest in Texas. "That light rail line is our lifeblood - our connection to the Convention Center. It also gives our guests direct access to the West End and NorthPark."
- Thomas Garner, regional manager of Chicago Title Company, added, "The rail line runs right in front of our building (Bryan Tower), and it was a real selling point to our employees when we said we were moving people from LBJ to downtown. They can leave their cars at a DART park and ride and come downtown without worrying about where to park."

National Experts

- Bellsouth's redeployment in 2000 is a good example of transit oriented location in Atlanta.
- Our economic development folks say they ask what the community is doing to deal with congestion. Transit initiatives give the impression of a plan of action.
- Developers such as Joseph Freed from Chicago came to Denver specifically to work on the Broadway Station with Cherokee. Their architects (Rosetti) followed them and opened an office.
- If you do believe there is an "inducement factor" of whatever size I'd be surprised to think it could be should to be a result of transit alone. Just having transit is not enough. The early history of BART is a great case study. That showed at a station scale "build it and they will come" did not work. It took public policy and leadership to attract growth to BARTs station areas. If the Denver Region does not use transit as a growth shaping tool and simply builds FasTracks I see no induced or growth benefit. By analogy this is what I believe is happening in Dallas, and it might be a future for what could happen in Denver. You spend a few billion dollars and build a huge transit system, then you take a passive role in shaping growth around the system and the real estate market pretty much ignores you. I think that is exactly what has happened in Dallas. You can also do lots of TOD planning and not act on the plans (Miami, Atlanta and Fairfax County in the 1980s and 90s) and get little or no benefit. You can probably also make the same case with Sacramento, San Jose, Baltimore and LA.

7. *Do you know of any research (academic or otherwise) that has documented the issue of transit-induced growth? Please list if so.*

Summary Results

- **Limited research on this issue, none that specifically address this issue of Net new growth**
- **Nothing that addresses redistribution vs. new growth**
- **Similar studies have focused on highway impacts not transit**

Economic Development/Business Community

- No – sorry
- Gen Guilanano's chapter in *The Geography of Urban Transportation* (3rd ed.) provides a nice summary with lots of useful citations. Marlon Boarnet wrote a nice white paper for Brookings titled "Do Highways Matter?" that might be useful, too.
- Nothing specific. Most research I have seen does not address the question of whether transit is a factor in NET new growth. Sometimes, the studies look at retail, residential, commercial that develops around rail stations and calls that new growth when in fact it's largely a redistribution or market dependent.
- No.
- *Economic Impacts of Expanding Public Transportation in the Wasatch Front Region* (Prepared for Envision Utah by Cambridge Systematics, February 2005)
- Portland Development Commission in Portland Oregon has done studies on the Pearl District redevelopment associated with the Central City Streetcar.

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Transit Providers

- <http://portland.bizjournals.com/portland/stories/2004/06/21/daily11.html>
- Google Joe Cortright, Young & Restless study
- Not that addresses redistribution vs. induced growth.
- I would check with Prof Landis and Cervero of UC Berkeley for I think they have made such a study

National Experts

- No
- *Transportation/Land Use Relationship: Public Transit's Impact on Land Use* (Steven Polzin, P.E.)
- Try Robert Lang at Virginia Tech if you haven't yet talked to him.
- Todd Litman (2004), *Rail Transit In America: Comprehensive Evaluation of Benefits*, VTPI (www.vtpi.org); available at www.vtpi.org/railben.pdf.
- Todd Litman (2005), *Evaluating Public Transit Benefits and Costs*, VTPI (www.vtpi.org); available at www.vtpi.org/tranben.pdf.
- Jeffery J. Smith and Thomas A. Gihring (2006), *Financing Transit Systems Through Value Capture: An Annotated Bibliography*, Geonomy Society (www.progress.org/geonomy); available at www.vtpi.org/smith.pdf.
- *Reconnecting America* (2004), *Hidden In Plain Sight: Capturing The Demand For Housing Near Transit*, Center for Transit-Oriented Development; *Reconnecting America*; Federal Transit Administration (www.fta.dot.gov); available at www.reconnectingamerica.org/html/TOD/newReport.htm.
- Transit on its own is not enough. And while linking transit with supportive policy results in clear benefits and positive results, at the metropolitan scale I see no evidence transit induces growth over what would happen anyway.

Basile Baumann Prost & Associates, Inc.

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SURVEY PARTICIPANTS

City/Region	Organization	Contact	Title
REGIONS WITH TRANSIT			
San Francisco Bay Area	San Francisco Center for Economic Development	Dennis Conaghan	Executive Director
	Bay Area Economic Forum	R. Sean Randolph	President & CEO
	Bay Area Rapid Transit (BART)	Jeff Ordway	Manager of Property Development
	Bay Area Rapid Transit (BART)	Roy Nakadegawa	Board Member (BART)
Washington, DC	Greater Washington Board of Trade	Tim Priest	Executive Director, GWI
	WMATA	Doug Hale	Office of Property Development and Management
Portland	Portland Regional Partners for Business	Pamela Treece	Executive Director
	Portland Development Commission	Seth Hudson	Senior Economic Development Director
	TriMet	Jillian Detweiler	Land Development Planner
	Metro	Richard Brandman	Transportation Planning Director
Dallas	Greater Dallas Chamber of Commerce	Mike Rosa	Economic Development Department
	City of Dallas	Karl Zavitkovsky	Director, Office of Economic Development
	DART	Jack Wierzenski	Director, Economic Development and Planning
San Diego	San Diego Regional Economic Development Corp.	Julie Meier Wright	President & CEO
	SANDAG (San Diego Association of Governments)	Sookyung Kim	Associate Planner
	Metropolitan Transit System (MTS)	Rob Schupp	Director of Marketing and Communications
Seattle	Puget Sound Regional Council Economic Development District Board	Bob Drewel	Executive Director
	Sound Transit	Scott Kirkpatrick	TOD Program Manager
	Metro Transit	Ronald Posthuma	Assistant Director
	Sound Transit	Tracy Reed	Project Manager, Link LRT Dept.
	Seattle Department of Transportation	Calvin Chow	Station Area Planning
Salt Lake City	Salt Lake Chamber of Commerce	Lane Beattie	President & CEO
	Salt Lake City Department of Economic Development	Alison McFarlane	Senior Advisor for Economic Development
	Salt Lake City Redevelopment Authority	DJ Baxter	Executive Director
	Envision Utah	Ted Knowlton	Assistant Executive Director
	Utah Transit Authority	Mike Allegra	Head of Planning
	Wasatch Front Regional Council (MPO)	Chuck Chappell	Executive Director
	Salt Lake Chamber of Commerce	Bob Farrington	Executive Director
	University of Utah	Keith Bartholomew	Professor of Urban Planning
	University of Utah	Philip Emmi	College of Architecture
	Future Moves Coalition	Roger Borgenicht	Executive Director

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Minneapolis/St. Paul	Minneapolis Regional Chamber of Commerce	Todd Klingel	President & CEO
	The Great North Alliance (Regional Economic Competitiveness)	Douglas Petty	CEO
	Metro Transit	Robert Gibbons	Director, Customer Services and Public Relations
	Metropolitan Council (MPO)	Connie Kozlak	Transit Planning
ECONOMIC DEVELOPMENT / TRANSIT / REAL ESTATE EXPERTS			
National	LG-CH2MHill	William Hearn	Director of Site Selection and Economic Development
National	APTA	Richard Weaver	Project Manager, Planning and Programs
National	ULI	Robert Dunphy	Senior Fellow, Transportation
National	IEDC	Ed Gilliland	Vice President, Advisory Services
National	FTA	Effie Stallsmith	Community Planner, Office of Planning
National	PB Placemaking	GB Arrington	Principal Practice Leader
National	Holland & Knight	Jeffrey Booth	Partner
National	DMJM+Harris	Diana Mendes	Vice President
National	University of South Florida	Steven Polzin PhD	Director Transit Research & Education
National	Brookings Institution	Chris Leinberger	
National	Citiventure LLC / ULI Colorado	Marilee Utter	President
National	Calthorpe Associates	Peter Calthorpe	Principal
National	Virginia Tech, Metropolitan Institute	Robert Lang	Professor / Director
National	Victoria Transport Policy Institute	Todd Litman	Founder/Executive Director
National	BBP Associates	Jim Prost	Principal