

Atlanta BeltLine Five Year Work Plan 2006 -2010 Review

Commissioned by Atlanta Beltline TAD Advisory Committee
January 2012



Acknowledgements

Atlanta BeltLine Tax Allocation District Advisory Committee (TADAC)

Independent Review Subcommittee

Al Caproni, TADAC Chair

Eugene Bowens

Monty Bruell

Anne McGlamry

Atlanta BeltLine, Inc. Executive and Senior Staff

Brian Leary, President and Chief Executive Officer

James Alexander, Housing and Economic Development Manager

Nate Conable, Director of Transit & Transportation

Ethan Davidson, Director of Communications

Rukiya S. Eaddy, External Affairs Manager

Lisa Gordon, Chief Operating Officer

Lee Harrop Program Management Officer

Richard Lutch, Director of Finance

Beth McMillan, Director of Community Engagement

Patrise Perkins-Hooker, Vice President and General Counsel

Paul G. Vespermann, Director of Real Estate

Fred Yalouris, Director of Design

Consultant: BAE Urban Economics

Janet Smith-Heimer, MBA, Managing Principal

Paul Peninger, MCP, Principal

Nancy Fox, MCP, Vice President

Stephanie Hagar, MCP, Associate

Nina Meigs, MCP, Associate

Additional Interviews

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James Alexander, Atlanta Development Authority

Valarie Wilson, Atlanta BeltLine Partnership Executive Director

Ryan Gravel, Perkins + Will

Kate Little, Chair, BeltLine Affordable Housing Advisory Board (BAHAB)

Andy Schneggenburger, Member, BeltLine Affordable Housing Advisory Board (BAHAB)

Raye Rawls, Fanning Institute, University Of Georgia

Langford Hollbrook, Fanning Institute, University of Georgia

Catherine Ross, Director, Center for Quality Growth and Regional Development, Georgia Tech

Michael Elliott, Associate Director, Center for Quality Growth and Regional Development, Georgia Tech

Rick Jacobus, Cornerstone Partnership

Carole Walton, CreateBoston Manager

Salvatore DiStefano, Boston Back Streets Manager

Alan Schleifer, Boston ReStore Manager

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Executive Summary

Purpose of Report

This report provides a review of the Plan of Work for 2006 – 2010 Budget for the Atlanta BeltLine, a transformative initiative to acquire railroad rights-of-way encircling the City of Atlanta, connect neighborhoods, create parks and pedestrian/bicycle trails, install a transit system, develop affordable housing, and stimulate economic development. Based on the review of past achievements and challenges, this report recommends eight items and provides examples of best practices from across the US where these items have been successfully implemented.

Recommendations & Best Practices

To address the challenges identified in this report, the following recommendations are made:

1. **Develop Consistent Financial and Progress Reports.** To record Atlanta BeltLine's progress, this report recommends that a simple report for the general public outlining ABI's expenditures made to date, and the projects/programs that these expenditures have funded, be prepared on an annual basis. This report should be posted online in a top-level location on the ABI web site.
2. **Reorganize Web Site.** The ABI web site is very informative, and contains extensive current and historic information. However, it is organized so that it becomes difficult to navigate in order to find some types of basic information. Examples are provided in this report to optimize the structure of a revamped web site.
3. **Create Dynamic Work Plan Process Including Annual Updates.** The Five Year Work Plan is a longer-term look ahead. To respond to the changing dynamics of public funding and private market cycles, the look ahead should be updated annually so that the Work Plan becomes a dynamic implementation strategy, with a continuous five year forward outlook, adjusting to upcoming opportunities.

4. **Enhance Advisory Committee's Roles and Procedures.** Both TADAC and BAHAB's advisory roles have been integral to ABI's work. However, there have been challenges along the way. This report recommends enhanced staffing support to these important advisory groups, as well as formalizing the advisory process so that input is better integrated into ABI Board and City of Atlanta decisions.
5. **Develop Real Estate Partnership Guidelines.** Most public agencies and affiliate organizations engaged in implementing major public-private projects operate with a set of established guidelines regarding acquisition, financing, partnerships, and disposition of real estate and other assets. It is recommended that ABI establish these guidelines.
6. **Create Parks/Trails Business Plan with O & M Funding Mechanisms.** The Atlanta BeltLine will build extensive public parks and trails. It will be critical to ensure ongoing high-quality operations and maintenance, with sustainable funding mechanisms. Work on a detailed Business Plan, including short- and long-term operations and maintenance, is recommended to commence as soon as possible.
7. **Refine Affordable Housing Program.** A goal of the Atlanta BeltLine is to produce extensive affordable and workforce housing over its lifetime. To date, production has lagged for several reasons. This report provides examples of refinements to the Housing programs, to increase future production.
8. **Stimulate All Aspects of Economic Development.** The Atlanta BeltLine has ambitious goals to stimulate workforce development, business growth, and private investment along the corridor. This report recommends a more comprehensive set of programs to achieve all of these aspects of economic development.

Each recommendation includes one or more examples of best practices from similar ambitious public agency initiatives around the US, to illustrate approaches that could be adapted and utilized by ABI.

Background

The Atlanta BeltLine concept grew out of a graduate school thesis authored in 1999 by Ryan Gravel, then a student at Georgia Tech. His initial vision, embraced by politicians, community leaders, businesses, and residents, has grown to become the single largest revitalization project in the history of the City of Atlanta. After several years of extensive community meetings, numerous studies, and broad discussion, the concept was formally initiated by City Ordinance 05-O-1733 in November, 2005. This ordinance, along subsequent legislation, created the TADAC and outlined its responsibilities, including the requirement to conduct an independent review of the Plan of Work for 2006 – 2010 Budget. This report is the result of that required independent review.

Atlanta BeltLine Goals

Specific goals of the Atlanta BeltLine over its 25-year life include:

- **Parks**— develop over 1,300 acres of new or expanded parks, as well as make improvements to over 700 acres of existing parks
- **Trails**— construct 33 miles of continuous trails connecting 40 parks, including 11 miles connecting to parks not adjacent to the BeltLine
- **Transit**—create a 22-mile transit system connecting to the larger regional transit network, including MARTA and the proposed Peachtree-Auburn Streetcar
- **Jobs**—create more than 30,000 permanent jobs and 48,000 construction jobs
- **Affordable Housing**—produce 5,600 new affordable housing units

Sources and Uses of Funds

The Five Year Work Plan (see Appendix B for entire document) laid out a spending plan and implementation activities to start the process of achieving these ambitious goals. It envisioned receiving and also spending \$427 M in the first five years (2006 – 2010) on a variety of items, including Parks & Trails, Right-of-Way and Transit, Development, and

Project Support. Actual revenues and spending have been lower than this initial estimate; according to ABI, it received and spent \$337 M between 2006 and 2010. Major changes from the initial estimate include lower bond proceed amounts, lower levels of affordable housing production, higher costs of plans and studies, and a slower ramp-up for transit plans and implementation. This report particularly notes that funding for the Atlanta BeltLine Affordable Housing Trust Fund has lagged in the production (and financing for ownership assistance programs) of affordable housing; only 147 units received funding commitments in the five years of the Work Plan, meaning the goal of producing 5,600 units in 25 years is thus far experiencing delays. In addition, the initially envisioned \$19M economic development incentive program has not occurred, leading to limited BeltLine-related economic development in the five targeted “activity centers”

Achievements & Challenges

The Atlanta BeltLine achieved a great deal from its inception in 2006 through 2010.

Achievements for the period included:

- Formation and staffing of Atlanta BeltLine Inc.
- Creation of Atlanta BeltLine Tax Allocation District Advisory Committee (TADAC)
- Creation of BeltLine Affordable Housing Advisory Board (BAHAB)
- Establishment of Community Engagement Framework
- Extensive community conversations and subarea study group input
- Adoption of 7 out of 10 Subarea Master Plans (+2 adopted in 2011)
- Extensive land and right-of-way acquisition
- Construction and opening of three parks (Historic Fourth Ward Phase I, D.H. Stanton, and Boulevard Crossing Phase I)
- Construction and opening of 5.8 miles of trails (along with 7 miles of interim trails)
- Adoption of Affordable Housing Policies and funding allocations
- Creation of Equitable Development Plan, Jobs Policy, and Community Benefits Plan
- Completion of Tier 1 Environmental Impact Statement (EIS) for transit system and trails

These achievements and the plans underway have laid a strong foundation for this transformative 22-mile corridor of transit, parks and trails, and revitalization to accommodate Atlanta's population and job growth. However, there have been notable challenges along the way, including economic decline, lagging affordable housing production, controversial land acquisition, a legal challenge regarding use of tax increment related to school districts, and limited targeted economic development. Mechanisms to operate and fund parks and trails' maintenance have not been clearly identified. Moreover, there have been challenges in finding clear, transparent, mechanisms to effectively obtain advisory input from TADAC and BAHAB.

To address these challenges, this report recommends eight items and provides examples of best practices to indicate approaches that could benefit the Atlanta BeltLine and future ABI activities.

Introduction

Purpose of Report

This report provides a review of the Plan of Work for 2006 – 2010 Budget for the Atlanta BeltLine, a transformative initiative to acquire railroad rights-of-way encircling the City of Atlanta, connect neighborhoods, create parks and pedestrian/bicycle trails, install a transit system, develop affordable housing, and stimulate economic development.

The BeltLine concept grew out of a graduate school thesis authored in 1999 by Ryan Gravel, then a student at Georgia Tech. His initial vision, embraced by politicians, community leaders, businesses, and residents, has grown to become the single largest revitalization project in the history of the City of Atlanta. After several years of extensive community meetings, numerous studies, and broad discussion, the concept was formally initiated by City Ordinance 05-O-1733 in November, 2005. This ordinance created the BeltLine Redevelopment Area, Tax Allocation District (TAD), and the Tax Allocation District Advisory Committee (TADAC). The TAD was described in this Ordinance to be created as of December 31, 2005, with a 25-year life, ending in December, 2030.

Notable studies and plans which laid the foundation for this event included *The BeltLine Emerald Necklace: Atlanta's New Public Realm* (Alex Garvin & Associates for Trust for Public Land, 2004), Tax Allocation District Feasibility Study (EDAW et al, 2005), and the Atlanta BeltLine Redevelopment Plan (EDAW et al, 2005).

When the BeltLine was approved by the Atlanta City Council, it created a new organization to implement the project. This new organization, Atlanta BeltLine Inc. (ABI), was charged with planning for and implementing the Atlanta BeltLine, including proposing Tax Allocation District (TAD) bonds backed by future tax increment collected from a defined area surrounding the project, to be issued by the Atlanta Development Authority. One of

the first steps taken by the new ABI in July, 2006 was to adopt a Plan of Work for 2006-2010 Budget (hereafter referred to as the Five Year Work Plan 2006-2010).

In September, 2006, the Atlanta City Council passed Resolution 06-R-1577, which further described the composition, purpose, and responsibilities of the BeltLine Tax Allocation District Advisory Committee (TADAC). One of the responsibilities listed for TADAC is:

Section 5. Independent Review. The Advisory Committee shall receive and provide an independent review of the Work Plan, which review shall be funded by the Redevelopment Agent.

This report is the result of the required independent review of the Five Year Work Plan 2006-2010. The TADAC issued a Request for Proposals, and in December 2010 selected BAE Urban Economics, Inc. to conduct the research and analysis for this independent review. Information about BAE Urban Economics is included as Appendix A to this report.

Report Methodology and Organization

This review includes both “looking back” and “looking forward” components. BAE had extensive discussions with members of the TADAC who serve on its Independent Review Subcommittee. BAE also interviewed key members of ABI staff, and 11 additional partners and related organizations’ staff members. BAE also reviewed more than 20 documents, as listed in Appendix D. The objective of this part of the research was to “look back” and understand the Atlanta BeltLine’s origins, early plans, initial Five Year Work Plan, revenues and expenditures over time, key reporting mechanisms, accomplishments, and challenges. To the extent possible, the summary of accomplishments was quantified using metrics including acres, units, and expenditure dollars.

Once the Atlanta BeltLine’s plans, accomplishments, and challenges were identified, BAE proposed and conducted several case studies of best practices from other cities around

the U.S to illustrate examples of how to meet BeltLine’s challenges in its next Work Plan cycle.

The following chapters commence with an overview of the Atlanta BeltLine in terms of its location, size, and scope. The Five Year Work Plan 2006-2010 is summarized and compared to actual accomplishments as provided by ABI staff to BAE. Next, each of the key components of the Work Plan – parks, transit, affordable housing, and economic development – are described in more detail, including challenges faced by each component since the BeltLine’s inception. This leads to the presentation of several “best practice” examples from similar initiatives in other cities across the U.S.

The Appendices include information about the authors of this report, the original Five Year Work Plan document, a budget allocation for affordable housing programs from late 2008, a listing of documents reviewed for this report, and supporting materials related to the case studies of best practices.

Overview of Atlanta BeltLine

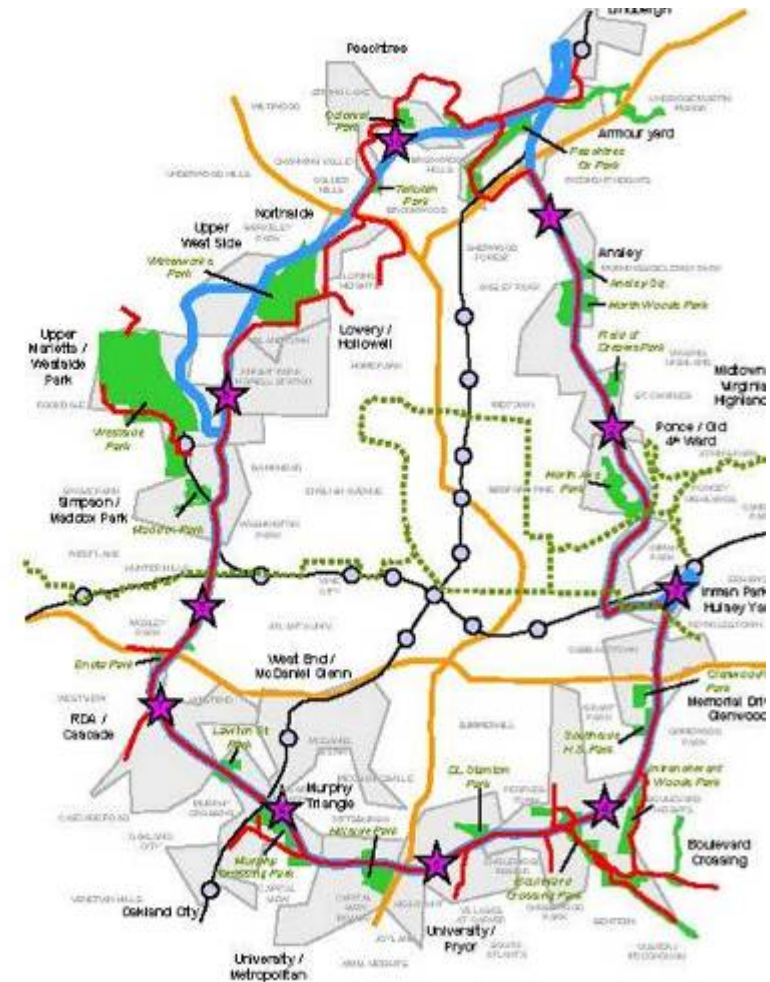
Atlanta BeltLine Goals

The Atlanta BeltLine is one of America's most ambitious urban revitalization initiatives. In the late 1990s, Atlanta faced uneven growth and development, with more affluence in northern neighborhoods and more disinvestment in southern neighborhoods. The City of Atlanta's elected officials recognized that the underused rail corridor encircling the city offered a way to unite communities and neighborhoods around a common, sustainable development vision, and stimulate a more evenly distributed growth pattern. At the same time, related policy goals including increased green space, more convenient transit, and expanded investment in affordable and workforce housing, could all be achieved by implementing this transformative concept.

The Atlanta BeltLine vision involves acquiring the rights-of-way along the rail lines that encircle the city to develop a 22-mile linear corridor of parks, trails, transit, and new development projects. The Atlanta BeltLine is envisioned as a 25 year project, initiated in 2005 and completed by 2030. When completed, the BeltLine's planning area will connect 45 neighborhoods, containing 22 percent of the City's current population and 19 percent of the City's land mass.

The following pages outline the formation steps and key aspects of the Atlanta BeltLine, in order to provide a general understanding of the first five years of evolution from concept to reality.

Figure 1: Atlanta BeltLine



Specific goals of the Atlanta BeltLine over its 25-year project life, as set forth in the Five Year Work Plan, include:

- **Parks**— develop over 1,300 acres of new or expanded parks, as well as make improvements to over 700 acres of existing parks
- **Trails**— construct 33 miles of continuous trails connecting 40 parks, including 11 miles connecting to parks not adjacent to the BeltLine
- **Transit**—create a 22-mile transit system connecting to the larger regional transit network, including MARTA and the proposed Peachtree-Auburn Streetcar
- **Jobs**—create more than 30,000 permanent jobs and 48,000 construction jobs
- **Affordable Housing**—produce 5,600 new affordable housing units

The City hopes to accommodate future population growth, expected to total more than 150,000 new residents over the next 25 years, along the BeltLine. By directing new growth to a planned corridor offering parks, trails, and transit, along with targeted public investments in art, housing, parks, and brownfield restoration, the BeltLine vision seeks to create an “emerald necklace” of sustainable development.

Figure 2: Graphic Depiction of BeltLine Goals

Source: “Reflecting Back, Moving Forward: 5 Years of Bringing the Vision to Life, Atlanta BeltLine,” ABI, 9-23-2011



Five Year Work Plan 2006-2010

In order to implement the BeltLine vision, Atlanta BeltLine, Inc. (ABI) is required by City of Atlanta Ordinance 05-0-1733 to develop a one, three, and five year budget and work plan, showing how revenues from tax allocation bonds (TADs) and other sources will be expended to build the vision.¹

The initial Work Plan entitled *Atlanta BeltLine Project Plan of Work for 2006-2010 Budget*, was published on July 5, 2006. This document and subsequent adjustments to it form the subject of this report. The initial Work Plan (i.e., *Plan of Work for 2006-2010 Budget*) can be viewed in its entirety in Appendix B. The following summarizes key components of the initial Work Plan, along with updated information as published by Atlanta BeltLine Inc. (ABI) and partner organizations, as well as analysis by BAE Urban Economics as noted.



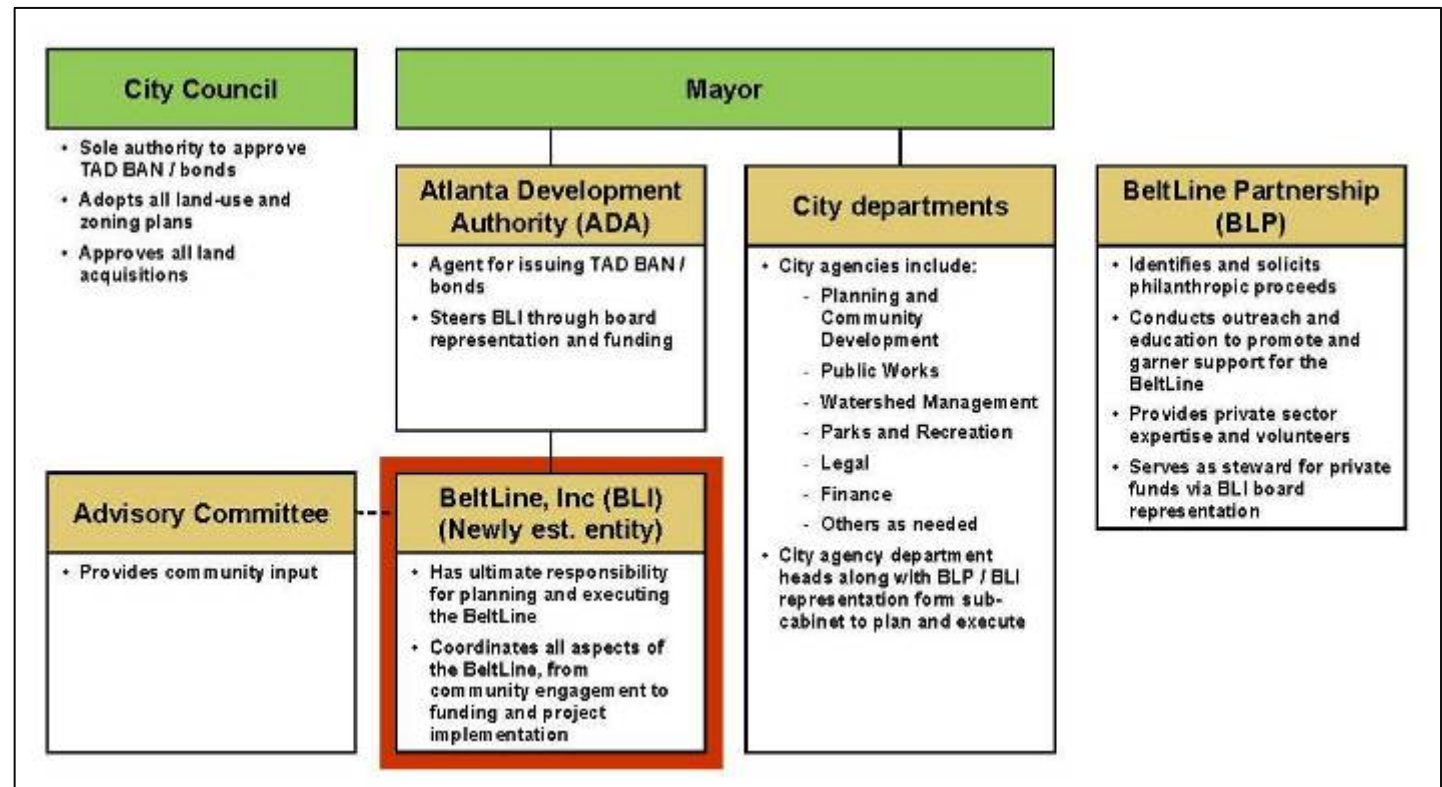
¹ City of Atlanta Ordinance 05-0-1733, Section 14

Atlanta BeltLine Organizational Structure

The initial Plan of Work called for the organizational structure depicted below. This structure envisioned that the Atlanta Development Authority (ADA) would form a new entity, BeltLine, Inc., which became Atlanta BeltLine Inc. (ABI). The initial organization chart also depicts the “Advisory Committee” which became the Tax Allocation District Advisory Committee (TADAC). In addition, the initial chart shows the “BeltLine Partnership,” charged with both soliciting philanthropic donations and organizing volunteers; this entity is now called the Atlanta BeltLine Partnership (ABP).

Figure 3: Initial Organizational Structure (2006)

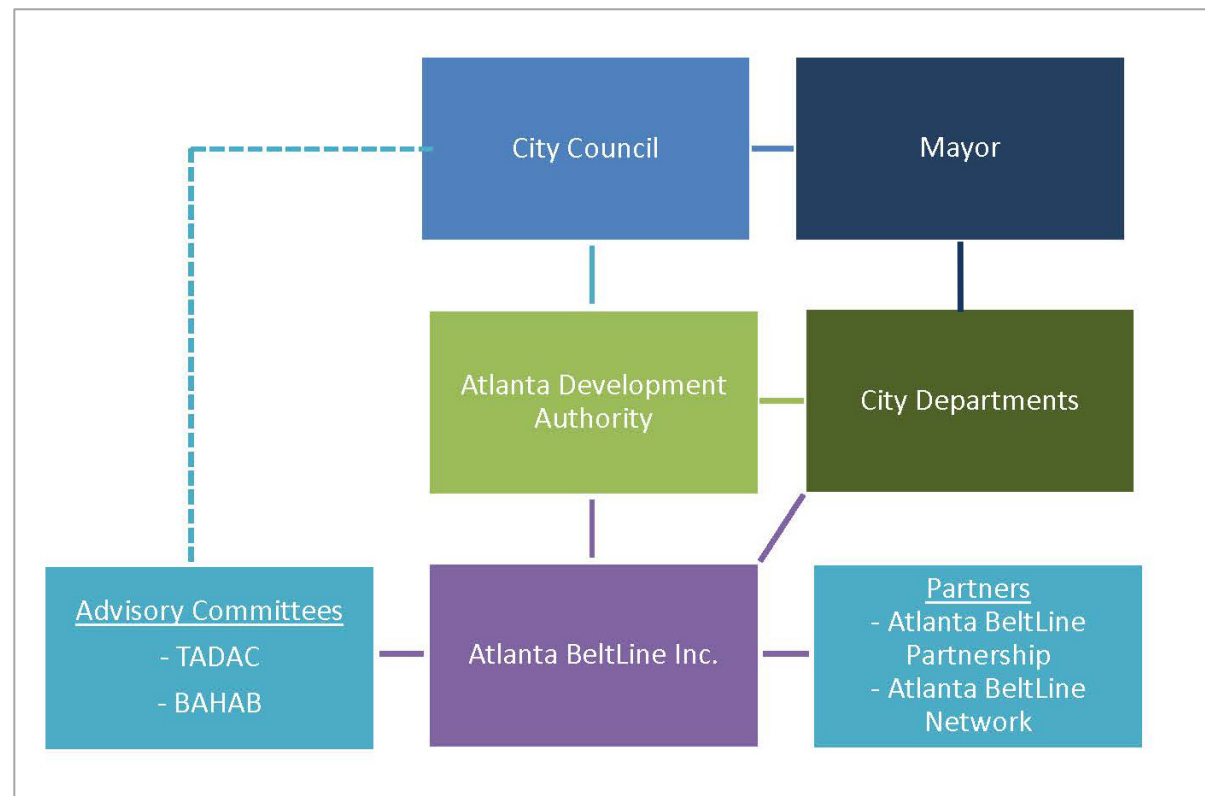
Source: Atlanta BeltLine Project Plan of Work for 2006-2010 Budget



Today, the organizational structure of the BeltLine is similar, but organizations have been named and staffed. ABI is governed by an 8-member Board, with members including the Mayor of the City of Atlanta and representatives from the Fulton County Board of Commissioners, the Atlanta Board of Education, and the Atlanta BeltLine Partnership.

Figure 4: Current Organizational Structure (2011)

Source: BAE Urban Economics



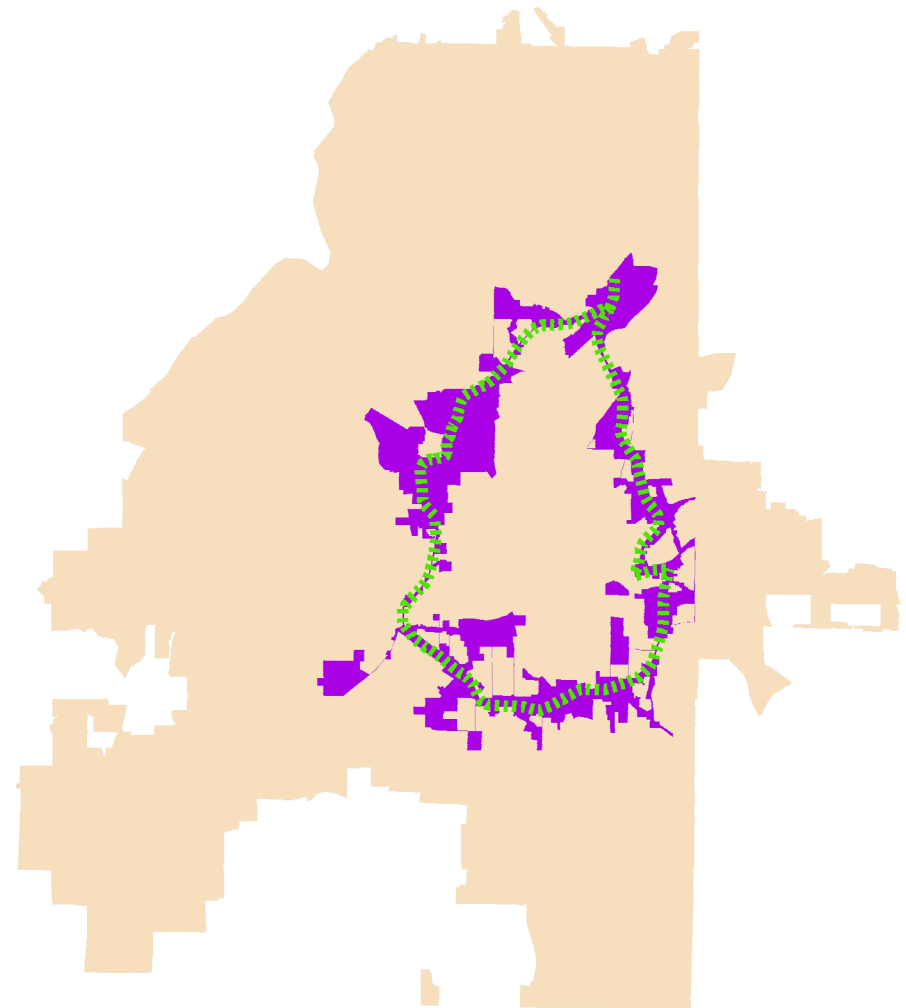
Redevelopment Plan and Tax Allocation District (TAD)

Early in the visioning for the BeltLine, it was determined that the project's goals would require a substantial and sustained funding commitment. Georgia law permits the formation of special tax allocation districts to collect the increments of new property taxes that flow from investing in revitalization. In May 2004, Mayor Shirley Franklin tasked the City and the Atlanta Development Authority (ADA) with assessing the feasibility of a TAD funding plan. In March of 2005, the 12-member BeltLine Tax Allocation District Steering Committee concluded that the TAD was a feasible mechanism for funding a significant portion of the BeltLine project.

The next step was to complete a comprehensive Redevelopment Plan, in accordance with the Georgia Redevelopment Powers Law, Chapter 44, Title 36. This process requires preparation of a Redevelopment Plan to (1) specify the boundaries of the area proposed for redevelopment, (2) provide evidence that the area meets the statutory requirements for the creation of a Tax Allocation District, (3) explain the proposed vision for the area and potential for redevelopment, (4) establish the area's current tax base, (5) project the increase in the tax base after redevelopment, (6) define the types of costs that will be covered by TAD funding, and (7) fulfill all technical requirements as required by the Redevelopment Powers Law.

The *Atlanta BeltLine Redevelopment Plan* was completed in November, 2005. It described a TAD Redevelopment Area totaling 6,545 acres, including not only the rail corridor itself, but 12 economic development activity centers envisioned to develop as major new mixed-use districts with transit service.

Figure 5: Tax Allocation District Boundaries



Relationship of 25-Year Redevelopment Plan to Work Plan

In the Redevelopment Plan, total Beltline project costs were estimated at \$2.2 to \$2.8 B, with slightly more than \$1.7 B of TAD bond proceeds to pay for these costs over the 25 year life of the TAD. This estimated TAD revenue meant that the BeltLine would need to obtain additional sources of funds ranging from \$483 M to over \$1.06 B to pay for project costs. Tax allocation district bond proceeds were seen as contributing between 62 and 78 percent of total project funds.

The Five Year Work Plan 2006-2010 to implement the Redevelopment Plan anticipated expenditures of \$427 M for the initial five-year period. The sources to fund this amount were assumed to include \$280 M in net TAD bond proceeds, \$57 M in donations, \$68 M in local funds, and \$22 M in federal funds (mostly assumed for transit system). TAD bond proceeds in the Work Plan were expected to contribute 66 percent of the total funds needed for the first five years.

A comparison of total funds envisioned in the Redevelopment Plan for 25 years, versus the Work Plan, shows that at least \$1.6 B of envisioned Redevelopment Plan costs would occur in later years, from 2011 to 2030. Comparison of the two documents does not clearly explain how the 25 year Redevelopment Plan estimates were broken down into the shorter-period covering only 2006 – 2010. Improving this information link between a 25-year time frame, and a shorter five-year planning cycle would be helpful to the general public, and is discussed later in this report. In particular, the TAD funding stream could benefit from updated analysis of how these needed funds will be generated throughout the life of the BeltLine.

Table 1: Estimate of Tax Allocation District Funds

	TAD	Other Funds	Total Funds	% TAD
25-Yr Redevelopment Plan				
Low Estimate	\$ 1,709,000,000	\$ 483,000,000	\$ 2,192,000,000	78%
High Estimate	\$ 1,709,000,000	\$ 1,063,000,000	\$ 2,772,000,000	62%
5-year Work Plan	\$ 280,000,000	\$ 147,000,000	\$ 427,000,000	66%

Five Year Work Plan: Achievements & Challenges

Summary of Revenues and Expenditures 2006 - 2010

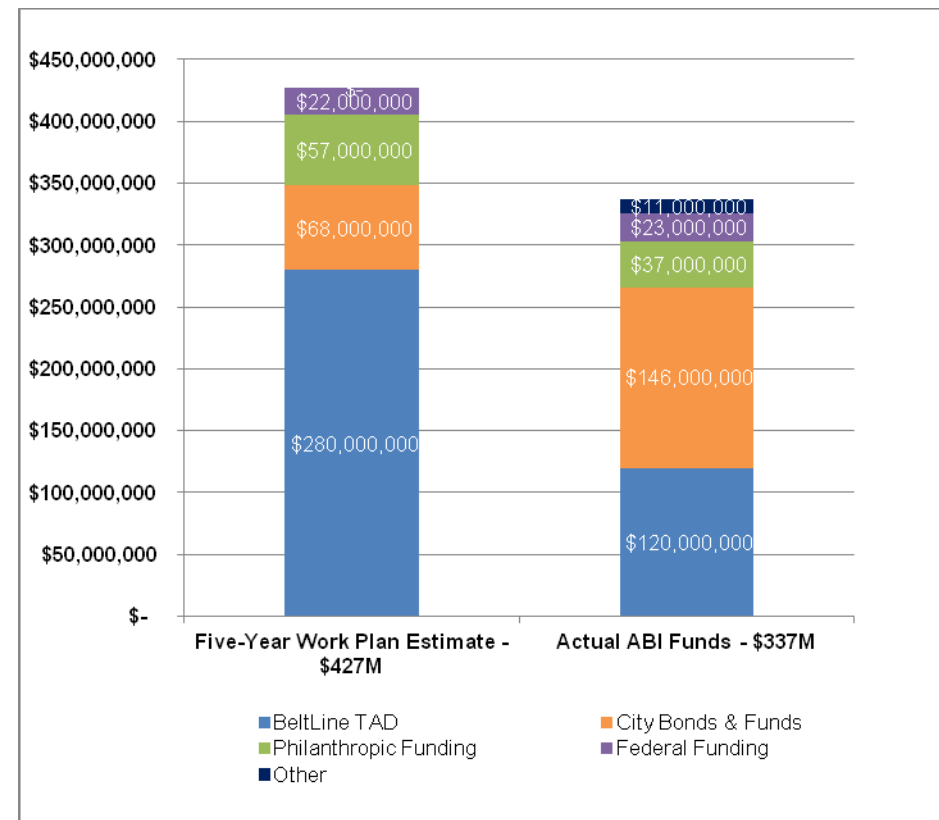
Atlanta BeltLine Inc. (ABI) has published multiple documents and presentations since the Work Plan 2006 – 2010, describing the financial picture of the BeltLine (see Appendix D for listing). Despite the

publication of these documents, it is difficult to ascertain the pattern of expenditures over time compared to initial estimates, due to differences in the format and categories of expenditures reported at different points in time. In fact, one of the key recommendations included in this report is to create a standardized reporting format with consistent categories of revenues and expenditures / projects, in order to be able to clearly communicate the mix of revenues and expenditures to all interested parties.

Revenues and Sources of Funds

The BeltLine's actual amount of revenues and sources of those funds have varied substantially from those initially estimated. The original Five Year Work Plan estimated total funding of \$427M for the 2006 - 2010 period; actual funding was \$337M, according to ABI.

Figure 6: Estimated and Actual Sources of Funds 2006 - 2010



It is important to note that revenue amounts varied due to several factors occurring over the 2006-2010 period including:

- Weakened bond market, affecting sale of TAD bonds
- Delays related to lawsuit challenging the use of school district tax revenues for redevelopment purposes²
- Federal Consent Decree for City of Atlanta which provided funds to create Historic Fourth Ward Park
- Donations lower than anticipated

As shown in Table 2, the actual funding received by the BeltLine fell short of the estimated amount in the Five Year Work Plan by \$91 M (a 21 percent shortfall), and the sources of funding varied widely from the Work Plan. BeltLine TAD bonds for \$78M were issued, and other TAD revenues of \$42 M were received, resulting in total TAD revenues of \$120 M. Further, funding from citywide programs including meeting the requirements of a watershed-related consent decree, were more than double the amount initial anticipated. Philanthropic funding, raised by the Atlanta BeltLine Partnership, fell \$20M short of anticipated amounts, echoing donor declines throughout the US during the 2008 – 2010 economic downturn.

Table 2: Estimated and Actual Sources of Funds 2006 - 2010

	Five-Year Work Plan		Actual 2006 - 2010	
	Funds	%	Funds	%
BeltLine TAD	\$ 280,000,000	66%	\$ 120,000,000	36%
City Funds & City Bonds (a) (b)	\$ 68,000,000	16%	\$ 146,000,000	43%
Philanthropic Funding (ABP)	\$ 57,000,000	13%	\$ 37,000,000	11%
Federal Funding	\$ 22,000,000	5%	\$ 23,000,000	7%
Other (c)	\$ -	0%	\$ 11,000,000	3%
Total	\$ 427,000,000	100%	\$ 337,000,000	100%

Notes:

a) According to Five Year Work Plan, this item includes anticipated watershed funds

b) Breakdown of Actual funds from City

Dept. of Watershed Management \$ 65,000,000

Park Improvement Bonds \$ 39,000,000

Quality of Life Bonds \$ 21,000,000

Dept. of Public Works \$ 21,000,000

c) Other Sources include \$5.0 M from MARTA, \$2.4 M from PATH, and \$3.1M in-kind.

Source: ABI, 2011.

² Refers to *Woodham vs. City of Atlanta, Atlanta Independent School System, Fulton County Tax Commissioner, and Atlanta Development Authority* filed in 2008. This case was resolved by the Georgia Supreme Court in 2008, leading to a 2009 public referendum and APS board meeting approving continued involvement in the IGA for the BeltLine TAD. An injunction was requested in 2008 on the distribution of APS' portion of the tax increment. The injunction was lifted in 2010, but the case is still active and on appeal. In October 2011, a new lawsuit was filed (*Sherman vs. City of Atlanta, Atlanta Independent School System, Fulton County Tax Commissioner, Atlanta Development Authority, and Atlanta BeltLine, Inc.*). These complex legal proceedings have served to delay full BeltLine implementation.

Expenditures (Uses of Funds)

This table presents a composite of expenditures based on the initial estimates set forth in the Work Plan 2006-2010 compared to actual expenditures as reported by ABI to the authors of this report.

There are several interesting items indicated by this comparison of estimated and actual expenditures. For Parks & Trails, acquisition costs were less than estimated, while development was slightly higher. For Right-Of-Way/Transit, most of the expenditures to date have been for the Northeast Corridor, a portion of the BeltLine which generated substantial controversy when acquired. Workforce housing has received \$9M in the BeltLine Affordable Housing Trust Fund to date (described in the next chapter in more detail), far less than the \$42M anticipated by the Work Plan. The Development Incentives program, according to other ABI materials, has not been fully formulated, and has also been impacted by the downturn in the development cycle. Funding for public art has

Table 3: Estimated and Actual Expenditures 2006 - 2010

	Estimated Per				
	Five Year Work Plan	% of Total	Actual	% of Total	Notes
Parks & Trails					
Acquisition	\$ 119,000,000	27.9%	\$ 83,778,000	24.8%	(1)
Development	\$ 59,000,000	13.8%	\$ 61,090,588	18.1%	(2)
Public Art	\$ 2,000,000	0.5%	\$ 1,145,869	0.3%	
Subtotal	\$ 180,000,000	42.2%	\$ 146,014,457	43.3%	
Row-Of-Way/Transit					
ROW Acquisition, Prep, Engineering	\$ 78,000,000	18.3%	\$ 72,000,000	21.4%	(3)
Subtotal	\$ 78,000,000	18.3%	\$ 72,000,000	21.4%	
Development					
Workforce Housing	\$ 42,000,000	9.8%	\$ 9,000,000	2.7%	
Development Incentives	\$ 19,000,000	4.4%	\$ 640,000	0.2%	
Brownfield Testing/Remediation	\$ 8,000,000	1.9%	\$ 360,000	0.1%	
Transportation & Pedestrian Access	\$ 23,000,000	5.4%	\$ 41,140,000	12.2%	(4)
Subtotal	\$ 92,000,000	21.5%	\$ 51,140,000	15.2%	
Project Support					
Administration, Communication, Finance	\$ 37,000,000	8.7%			
Foundational Studies, Redevelopment Plan	\$ -	0.0%	\$ 26,000,000	7.7%	(5)
ABI Admin	\$ -	0.0%	\$ 13,000,000	3.9%	
Bond Financing	\$ -	0.0%	\$ 13,000,000	3.9%	
Subtotal	\$ 37,000,000	8.7%	\$ 52,000,000	15.4%	
Contingency	\$ 40,000,000	9.4%	\$ 16,000,000	4.7%	
Grand Total	\$ 427,000,000	100.0%	\$ 337,154,457	100.0%	
Notes:					
1) 445 acres acquired					
2) Actual includes Historic 4th Ward Park Ph 1 & 2, DH Stanton Park, Boulevard Crossing Ph 1, West End Ph 1 & 2, West End Ph 1 & 2, and Northside and Eastside Corridor Design					
3) NEC Acquisition, Tier 1EIS					
4) City-managed QOL and TIP projects within Atlanta BeltLine Study Area					
5) Master Plans, Redevelopment Plan, Feasibility Study					
Source: ABI, 2006 and 2011A5					

lagged substantially, behind projected funding and project support has been more costly than originally envisioned, including \$26M for studies and plans to initiate the Atlanta BeltLine process.

Formation of Advisory Committees

Tax Allocation District Advisory Committee (TADAC)

The TADAC was created to implement a requirement contained in the establishing BeltLine legislation, City Ordinance 05-O-1733, passed in November, 2005. The roles and responsibilities of the TADAC were further defined in the subsequent Resolution 06-R-1577, passed in September 2006. This Resolution deemed that the TADAC should have between 42 and 45 members with appointments made to provide geographic representation through 12 members, technical expertise represented by 10 members, City Council representation from 6 members, President of City Council represented by 1 member, Mayor of Atlanta represented by 1 member, Fulton County Board of Commissioners represented by 10 members, and Atlanta Public Schools represented by 2 members.

At present, TADAC has 27 members. TADAC met almost monthly for the first five years; currently, the full TADAC membership meets bi-monthly and smaller groups also meet regularly through an Executive Subcommittee, several permanent subcommittees, and several Standing Task Forces. The TADAC has adopted bylaws for its operations.

The Resolution spells out TADAC's primary roles and responsibilities, which include but are not limited to:

- Make recommendations to ADA and the City on the issuance, allocation, and distribution of tax allocation bond proceeds within the Beltline Redevelopment Area
- Monitor the efficient and equitable implementation of the BeltLine Redevelopment Plan
- Accept reports from Neighborhood Planning units and other designated bodies related to decisions regarding economic development, land use or zoning issued related to the approved Work Plan as authorized by City Council

Additional responsibilities contained in the Resolution include:

- Develop and implement a Decision Support Tool (underway through a contract with Georgia Tech Center for Quality Growth and Regional Development)
- Provide a semi-annual report to City Council and the Mayor
- Convene an annual public reporting meeting
- Receive and provide an independent review of the Work Plan (subject of this report)
- Collaborate with ABI on an Equitable Development Plan (policies adopted by both TADAC and ABI, but preamble and specific indicators recommended by TADAC were not brought to ABI Board)

It should be noted that in practice, TADAC has experienced several challenges in fulfilling its roles and responsibilities as outlined above. Based on interviews with Executive Committee members, these challenges include:

- Limited ABI resources provided to staff TADAC and its subcommittees (e.g., paid professional staff to organize and announce meetings, support subcommittee work, assist TADAC membership, monitor attendance, identifying vacancies and follow up with appointing agencies provide agendas and minutes from prior meeting, take notes, etc.)
- Limited and/or inconsistent reporting and information-flow from ABI to TADAC for its review prior to major decisions being made
- Lack of clear mechanisms and processes to transmit TADAC advisement to ABI/ADA
- Different views regarding whether TADAC's role is limited to advisement on bond proceeds' expenditures or all ABI projects. This adds particular complexity to TADAC's activities, as most ABI projects have a mix of funding sources including bond proceeds and other sources (e.g., federal and state grants, donations via the Partnership, etc.). Thus, it is not practical to limit TADAC's review to just use of

bond proceeds, given that the BeltLine is a complex project with multiple funding sources anticipated.

- Limited and/or inconsistent sharing of information between subcommittees of TADAC.

The Recommendations & Best Practices chapter in this report suggests improvements to address these challenges.

BeltLine Affordable Housing Advisory Board (BAHAB)

The ordinance establishing the BeltLine Redevelopment Area and TAD (05-0-1733) includes Section 11, which “sets aside” 15 percent of all net TAD bond proceeds to “be used solely for the purpose of creating affordable housing within the BeltLine Redevelopment Area. This section of the Ordinance continues by describing the creation of an Affordable Housing Trust Fund with these proceeds, and states that “Prior to the first issuance of tax allocation bonds, the City shall establish policies and goals related to the use of the BeltLine Affordable Housing Trust Fund proceeds. Such goals and policies shall include the formation of a BeltLine Affordable Housing Advisory Board...” and continues to describe the composition of this board’s membership.

The BeltLine Affordable Housing Advisory Board (BAHAB) was subsequently formed. To kick off a community-wide conversation regarding its policy formation process, BAHAB set forth the following principles:³

- **Income Targeting:** balance between targeting lower-income households and providing more units targeting relatively higher income households.
- **Owner-occupied Housing:** requires substantially more subsidy than rental, want to provide home ownership opportunities to lowest income range feasible.
- **Rental Housing:** increase the balance of housing choice in desirable neighborhoods around the BeltLine.
- **Gentrification and Preservation:** use public interventions (tax abatements, rent restrictions and direct funding) to maintain affordable housing for lower-income families; try to mitigate involuntary displacement of residents.
- **Definition of Quality Affordable Housing:** housing with good design, durable materials, sustainable/green design, close to services and transit, and with appropriate density and unit sizes.

³ Citywide Briefing, 8-19-2008

- **Terms and Conditions of Fund Investment:** flexible, more equity-like for deal feasibility, long-term sustainability, reduced complexity and onerous requirements, alignment to the fullest extent possible with other public funding programs.
- **Partners:** work closely with BeltLine colleagues – TADAC, BeltLine Partnership, ADA, and the City’s Bureau of Housing, and affected communities.

After extensive stakeholder input, the following program components were eventually outlined and adopted by City Council.

- Downpayment Assistance
- Multifamily Rental Developer Incentives
- Single Family Developer Incentives
- Community Housing Development Organization (CHDO) set aside for multifamily rental and single family homeownership
- Property Acquisition for Rental Affordable Housing
- Property Acquisition for Owner-occupied Affordable Housing

Target household income levels are from 30 percent to 115 percent of Area Median Income (AMI), with affordable homeownership emphasized for the higher groups in this range, and affordable rental units emphasized for the lower end of this income range.

In the past two years, BAHAB has not been actively engaged in some of the refinements to the BeltLine’s affordable housing expenditure process. Interviews with BAHAB members conducted for this report indicated that similar to TADAC, BAHAB has not found an effective working relationship or set of mechanisms to provide input into ABI and its partners’ activities on this topic. Suggested improvements to this situation are included in the Recommendations & Best Practices chapter later in this report.

Land Acquisition

One of the most challenging aspects of the BeltLine is that it requires acquisition of rail corridor lands and rights-of-way from several different railroad companies. According to “Reflecting Back, Moving Forward: 5 Years of Bringing the Vision to Life” (ABI, 2011), approximately 9.2 miles of the total 22 miles of right-of-way needed to complete the BeltLine have been acquired or secured. In addition, 481 acres of parkland / open space have been acquired, and 5.8 miles of permanent trails have been completed.

It should be noted that one acquisition conducted by ABI to create the BeltLine experienced substantial controversy. A private developer acquired a 4.5 mile length of the corridor, along with parcels for transit-oriented development projects. The total land area acquired by the developer was 66 acres. After the developer ascertained that achieving development approvals at densities he had envisioned would be a major challenge, the parcels were purchased by a joint venture of ABI and two private parties for \$68 M, using equity from the two private partners, along with a bank loan obtained by ABI for \$21 M and a \$45 M one year note to the seller. This joint venture was then dissolved by ABI through the issuance of its first bond series for \$64.5 M, which was used to pay off the note and the private partners (along with a deposit to the Affordable Housing Trust Fund). The properties were then transferred to the Atlanta Development Authority, although ABI continues to make payments on the bank loan.

TADAC raised concerns about this proposed use of TAD funds for this pay-off given the fact that TADAC had not been consulted about the original purchase decision. At the time, ABI stated to TADAC that the pay-off needed to occur this way to both secure control of this portion of the BeltLine and minimize the risk of losing the entire public investment that had been made to date⁴.

⁴ It should be noted that most of the reporting on this process, as well as correspondence from ABI staff to TADAC, cites ABI as the venture partner and eventual sole owner of the land, but subsequent discussion with ABI staff indicated that the properties have since been transferred to the Atlanta Development Authority in order to enable the full spectrum of future parcel sales to either public or private parties.

In addition to the large amount of TAD funds allocated to purchase this piece of the BeltLine, additional questions have been raised with respect to the Subarea Master Plan process, underway under ABI's direction; some stakeholders continue to be concerned that the push to plan for relatively high transit-oriented densities for this sub-area are largely driven by ABI's need to re-sell these expensive parcels to recoup its investment.

Research for this report indicated that ABI does not have a formal policy or guideline regarding its land acquisition and potential development partnership activities, beyond those goals stated in public documents described herein. Most public agencies engaged in revitalization and investment activities of the magnitude of ABI, however, do have such guidance, in order to provide clear understanding of authorized roles and procedures. In most public agency cases, this guidance is further defined by restrictions on public funds; in the case of ABI, utilizing a mix of funds including TAD funds (which do have certain restrictions) as well as donor funds (which do not have regulated restrictions), this issue is likely more complex to balance. This gap in ABI process may become even more important in future years, as the organization further develops its development incentives program (proposed to commence in Fall 2011).

The Recommendations & Best Practices chapter later in this report provides suggested best practices to develop a Real Estate Investment and P3 Guideline to address this situation moving forward.

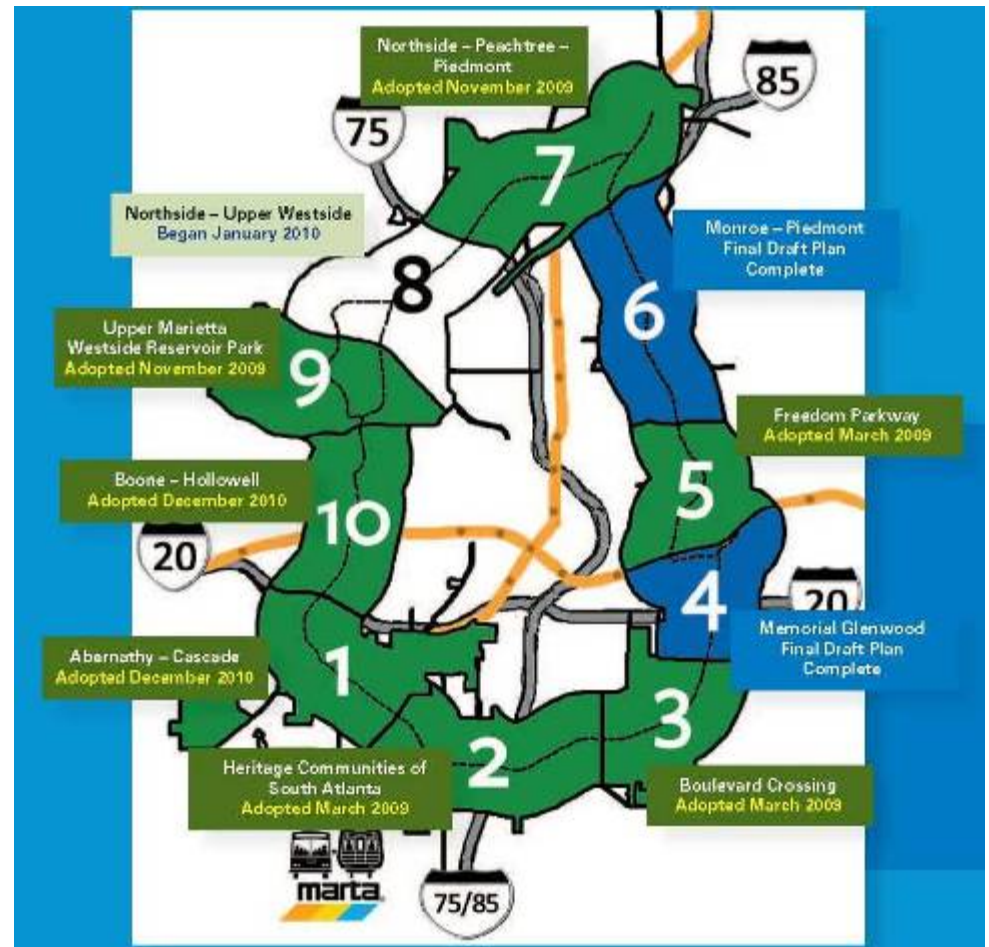
Completion of Subarea Master Plans

A major achievement for the 2006 – 2010 period was the preparation of 9 of the 10 Subarea Master Plans, as shown. By the end of 2010, seven of the Subarea Master Plans had been adopted by City Council, with two pending adoption and one, for Area 8, in process. Since 2010, both of the previously pending plans have been adopted, leaving the Northside – Upper Westside still in process with the community.

These Subarea Master Plans have been prepared through an extensive community outreach and engagement process, utilizing a Study Group mechanism to obtain comprehensive input. All draft and final Subarea Plans are posted on the ABI website at www.beltline.org.

It should be noted that while different consultants assisted in the preparations of these Subarea Master Plans, and thus, their format and specific contents may vary, in general these Subarea Master Plans provide a clear and comprehensive land use plan for each Subarea.

As these Subarea Master Plans undergo future updates, it may be advisable to develop a consistent format for each one, in order to facilitate review and comparability.



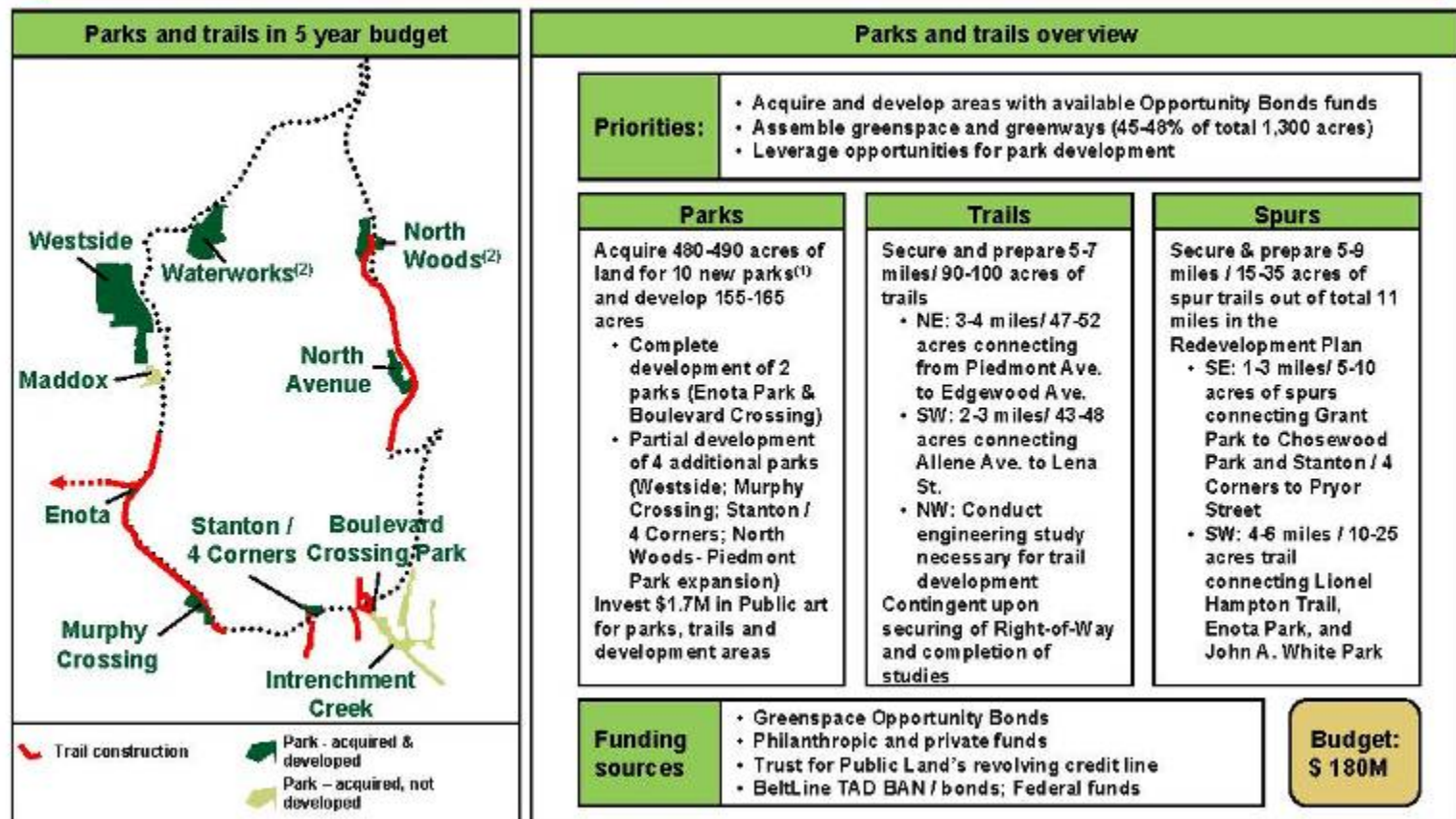
Development of Parks and Trails

The Five Year Work Plan set forth the following project goals:

GROWING GREENSPACE WITH PARKS & TRAILS

ADA

Atlanta Development Authority



(1) 24 parks identified in Redevelopment Plan, 25 parks result of splitting Boulevard Crossing into 2 parks- Boulevard Crossing & Intrinchment Creek parks

(2) Acreage already owned by city: North Woods- all; Waterworks-110 acres

Five Year Work Plan Progress

The recent ABI presentation “Reflecting Back, Moving Forward” reports the following:

- 481 out of the goal of 488 acres of parkland have been acquired
- 96.7 acres out of the goal of 160 acres have been developed
- About 5.8 miles of permanent trails and 7 miles of interim hiking trails have been developed

Notable new parks include the following:

- **Historic Fourth Ward Park Phase I .** This park, located on five acres in the Old Fourth Ward neighborhood bordered by Morgan Street on the north, Rankin Street on the south, Edith Street on the east and Garden Park Drive on the west, includes a beautiful two-acre lake, paved walkways, lawns, and a 350-person amphitheater. The purpose of the lake is to provide capacity relief to the City's combined sewer system and it is designed to integrate with the surrounding Historic Fourth Ward Park while meeting federal consent decree requirements. All irrigation needs will be met by the storm water basin and no water will be drawn from the City's water supply. The park also utilizes energy-efficient LED lighting to minimize energy costs and provide a secure environment. Several private residential and mixed-use projects have simultaneously been developed near the park, demonstrating on-the-ground stimulative effects of parkland investment. It should be noted that following the 2010 end point of this report's review, Phase II of the Park was subsequently also completed.
- **D.H. Stanton Park.** This eight-acre park is located in the Peoplestown neighborhood in southeast Atlanta. It involved complete renovation of a site that had only a



small playground. Today this park includes a Little League- and softball-size ball field, splashpad, playground, public art, pavilion, restroom facilities, lawns and walkways. Funded by a combination of funds, the park involved environmental remediation of three acres adjacent to the site of the former playground. The park utilizes solar photovoltaic panels for power, making it the City of Atlanta's first energy cost-neutral park.

- **Boulevard Crossing Park Phase I.** This five-acre park recently celebrated its opening. Located in southeast Atlanta at the corner of Boulevard at Englewood Avenue, three blocks south of Grant Park, the park includes two temporary multi-use fields suitable for soccer or rugby, as the first phase of an eventual 20 acre facility. According to the ABI Annual report, TAD funds were not used for this project.

In addition, ABI reports the following trail projects accomplished as of 2010:

- **Northside Trail.** This 0.9 mile trail runs from Ardmore Park to Atlanta Memorial Park through Tanyard Creek Park. It opened to the public in April 2010. It is the first segment of Atlanta BeltLine Trail completed on the north side of Atlanta.
- **West End Trail Phases I and II.** This trail, 2.4 miles in length, connects the West End, Mozley Park and Westview neighborhoods.
- **Eastside Trail Phase I.** This trail, 2.5 miles in length from 10th Street and Monroe Drive to DeKalb Avenue, broke ground in 2010, with completion scheduled for late 2011. It is the first segment of Atlanta BeltLine trail in the old rail corridor and first segment on the east side of Atlanta.
- **Interim Trails.** More than 7 miles of interim trails on the east side and in the southwest section of the Atlanta BeltLine Corridor.

Challenges

The primary challenge identified during research for this report is that new BeltLine-funded and developed parks do not have dedicated, sufficient ongoing operations and maintenance funds (TAD funds can only be used for capital costs). It is critical to the overall goals of the Atlanta BeltLine, as well as to the quality of life in the corridor, that this issue be addressed concurrently with the initial capital investments in parks and trails.

To provide perspective on levels of likely operations and maintenance costs, urban parks can vary from \$50,000 to over \$100,000 + per acre per year for operations and maintenance, depending on factors such as wages, amount of active recreation equipment and facilities (e.g., playground equipment), and intensity of landscaping. For the BeltLine, with an eventual goal of developing 1,300 acres of new parkland, this annual cost could exceed \$130 M per year. Maintenance for the trail system will add further to this estimate.

ABI staff report that the intent is to turn over the parks' operation and maintenance to the City of Atlanta roughly two years after initial construction. Further, ABI staff have indicated that ongoing operations and maintenance funding is not part of ABI's mission, and no estimate of operations and maintenance costs for the extensive park and trails systems planned for implementation along the Atlanta BeltLine is available. Further, no clearly established process for turnover of the parks, oversight of their ongoing operations, or funding for critical upkeep, security, capital replacement, and ongoing maintenance has been determined, either within or beyond ABI's current activities. To ensure that the investments made in the Atlanta BeltLine's parks and trail system is preserved and that this new public amenity is well-managed and maintained over the long-term, the Recommendations & Best Practices section of this report recommends creating a Parks and Trails Business Plan with clear oversight, operations, and maintenance responsibilities and funding mechanisms. While the actual operations and maintenance, and its funding, may be beyond ABI's scope, planning for these critical functions would fit within the preparation of the next Five Year Work Plan.

Planning and Implementation of Transit

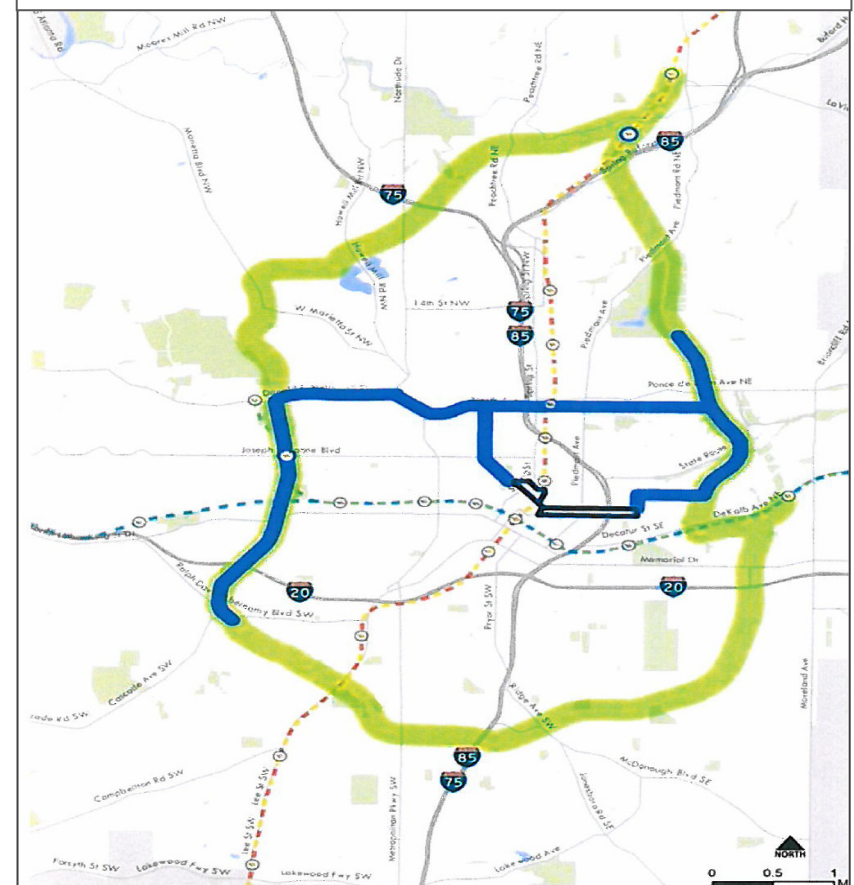
A key component of the BeltLine project will be construction of street-level transit in the form of one or more systems to connect neighborhoods around the BeltLine to each other as well as to convenient east/west and north/south transit corridors provided by MARTA. Planning for, funding, and constructing this ambitious transit system is a time-consuming process, requiring balancing community needs, other transportation improvement projects, and strategies to raise local and federal funds. The availability of tax allocation district funds will help this process. The BeltLine planning indicates that one model being considered is the Portland Streetcar model, which has financed part of its capital costs using local tax increment funds (for a discussion of how Portland and other contemporary US streetcar systems have been financed by capturing the value added to land long the routes).

Five Year Work Plan Progress

A Tier 1 Draft Environmental Impact Statement (EIS) was published in June, 2011 for public comment. This document evaluates proposed new transit in terms of technology (modern streetcar or light rail) and in terms of general alignment and rights-of-way needs. The subsequent Tier 2 EIS will evaluate more specific aspects of the transit system once key decisions have been made, including transit station locations, vehicle types, site-specific impacts, and trail design. ABI and its consultants are also conducting a Transit Implementation Strategy to identify specific first-phase transit segments and develop information for eventual application for federal funding. The map shown indicates ABI's most recent first-phase transit route concept (December, 2011).

Figure 7: BeltLine First-Phase Transit Concept

Source: ABI, December 2011.



Affordable Housing

One of the central elements of the BeltLine, and highlighted in the Five Year Work Plan, is the development of affordable housing (sometimes referred to as “workforce” housing). In order to accomplish the goal of creating a mix of housing types available to a broad range of Atlanta households, 15 percent of all BeltLine Tax Allocation District (TAD) net bond proceeds are to be set aside in the BeltLine Affordable Housing Trust Fund (HTF) to be used for affordable housing within the TAD boundaries. Over the 25-year life of the project, the amount of housing funding is projected to be \$240 million; this funding is expected to generate approximately 5,600 affordable housing units, or approximately 220 units on average per year⁵.

Appendix C to this report shows a published 2008 chart allocating portions of the Housing Trust Fund to each of these programs. It is notable that both the eventual dollars received into the Housing Trust Fund, and the expenditure of these more limited dollars for affordable housing production, have not been aligned with the data provided in 2008.

Five Year Work Plan Progress

Progress to date for affordable housing production has been relatively slow. Actual expenditures and funding commitments are summarized below.

Housing Trust Fund Proceeds to Date

According to ABI, the amount of Housing Trust Fund proceeds to date, totaling \$8.9 M, are based on the initial bonds issued in October 2008, which provided \$8.8 M (e.g., 15 percent of the total bond less capitalized interest and bond issuance costs). When the initial bond series was refinanced in September 2009, a small additional deposit was made to the Trust Fund. However, it should be noted that ABI also reports \$42 M of TAD revenue has received directly from the Tax Allocation District since its formation that is not pledged to repay bonds; these funds have not contributed to the Housing Trust to date.

⁵Total funding from Redevelopment Plan.



Downpayment Assistance

Of the \$8.9 M placed in the Housing Trust Fund to date, \$1.3 M has been used for a downpayment assistance program that has provided second mortgages for households earning up to \$81,000 (115 percent of Area Median Income, or AMI) along the BeltLine. Marketing of this assistance can be found at www.livealongthebeltline.com. Assistance is provided as zero percent interest second mortgage for up to 20 percent of the sales price of homes up to \$252,890. The average amount of assistance provided per household has been approximately \$37,000. According to BAHAB guidelines, buyers can have household incomes up to up to 115 percent of AMI, with priority given to households earning less than 80 percent of AMI.

Multi-Family Housing Subsidies

According to the ADA staff person administering the HTF, an additional \$3 M in funding commitments has been made to two affordable multi-family housing developments: Phoenix House and Reynoldstown Senior Apartments. Although these funding commitments are in place, neither of these projects has yet been built.

Summary

In summary, commitments to a total of 147 units have been made since the HTF was initially funded in 2008 through 2010, including downpayment assistance to 35 home buyers, and subsidy to 112 to-be-built rental units. In late 2011, ABI announced acquisition of Triumph Lofts, a distressed condominium project with 30 units that will be priced for sale at an average of \$150,000.

Table 3: Summary of Affordable Housing Trust Fund Commitments 2006 – 2010

Note: Additional commitments made in 2011

	<u>Units</u>	<u>Incomes Served</u>	<u>Housing Trust Fund</u>	<u>Other</u>	<u>Total</u>	<u>Notes</u>
Downpayment Assistance	35	up to 115% AMI	\$1,300,000	NA	NA	
<u>Multi-Family Rental (committed)</u>						
Phoenix House	69	30-50% AMI	\$1,650,000	\$7,542,466	\$9,192,466	9% LIHTC
Reynoldstown Senior Apartments	43	50% AMI	<u>\$1,430,000</u>	<u>\$4,257,552</u>	<u>\$5,687,552</u>	HUD 202
Subtotal	112		\$3,080,000	\$11,800,018	\$14,880,018	
Total Units	147					
Total Spent or Committed			\$4,380,000			
Remaining HTF Funds, 9/2011			<u>\$4,520,000</u>			
Total HTF Funds			\$8,900,000			

Sources: ABI, 2011; BAE, 2011.

Challenges

The above summary underscores that affordable housing support to residents of the BeltLine TAD has lagged both the goals expressed in the Five Year Work Plan and the overall 25-year project goals.

Interviewees for this report cited two reasons which are believed to cause this lag in progress:

- Market conditions
- Limited ability to combine the HTF dollars with other available funding sources

Market Conditions

With respect to market conditions, Atlanta, like many metropolitan regions across the US, has experienced a downturn in housing values during the past several years. This may well have dampened buyer interest in obtaining downpayment assistance from the HTF program. Demand for below-market-rate or income-limited ownership housing units has slowed across the US.

However, affordable rental housing, another valuable option to provide new affordable housing, especially for the target income range of 30 to 60 percent AMI, continues to be in strong demand in Atlanta. According to the Housing Element of the Atlanta Comprehensive Plan (2010), there are over 42,000 renter households in Atlanta that experience a cost burden (e.g., paying more than 30 percent of their income for rent). Cost burden is a common measure of affordable housing need. The same document cites that over 31 percent of Atlanta households live below poverty, mostly renter households. Clearly, these households, particularly in the 30 to 60 percent AMI level, require new affordable rental housing production.

Combining Housing Trust Fund with Other Subsidies

One of the most common methods of financing affordable rental housing for households in the 30 to 60 percent AMI income level across the US is the use of Low Income Housing Tax Credits (LIHTCs). This mechanism raises equity investment dollars by selling a tax

credit to the investor. The affordable housing developer uses this equity investment as part of the project financing, and typically obtains both grants and loans for the remainder. The BeltLine's Housing Trust Fund, with uncommitted dollars and more funding anticipated over the life of the BeltLine project, is an excellent resource to combine with LIHTCs to finance and develop new rental housing serving the 30 to 60 percent AMI income category.

There are two types of Low Income Housing Tax Credits (commonly known as 4% and 9% credits). In some states, certain federal regulations are interpreted to mean that the 9% LIHTC can only be combined with tax increment or other local funds in certain ways, sometimes limiting the value of these funding sources. Research for this report indicated that this interpretation has been raised for the BeltLine, although the reasons for interpreting the legal issues in this way are not documented or clear, suggesting that a more formal review of this issue is needed. Moreover, it should be noted that the 4% LIHTC is not restricted in this way, and provides a viable option for many affordable housing developers, including both non-profit and for-profit organizations. The Best Practices chapter of this report provides an example of this combined use; combining TAD funds with LIHTCs should be further amplified as a viable rental housing development mechanism for BeltLine projects.

Staff Proposal to Emphasize a Community Land Trust Model

Another mechanism to support affordable and workforce housing with rising prominence around the US is the community land trust approach, where land is held by a non-profit trust in perpetuity, reducing costs of development by eliminating the need to finance the cost of the land. This mechanism also can work well in situations where an outside set of factors such as major public investment in transit often brings rising land values, increasing development costs and thus constraining new affordable housing production. Recent ABI staff proposals have recommended shifting the HTF's emphasis to this model. Specifically, in a presentation given by ABI staff in June, 2011 to the ABI Board, staff recommended working closely with the Atlanta Community Land Trust (ACLT) to focus on land and property acquisition near planned transit facilities. It was recommended that

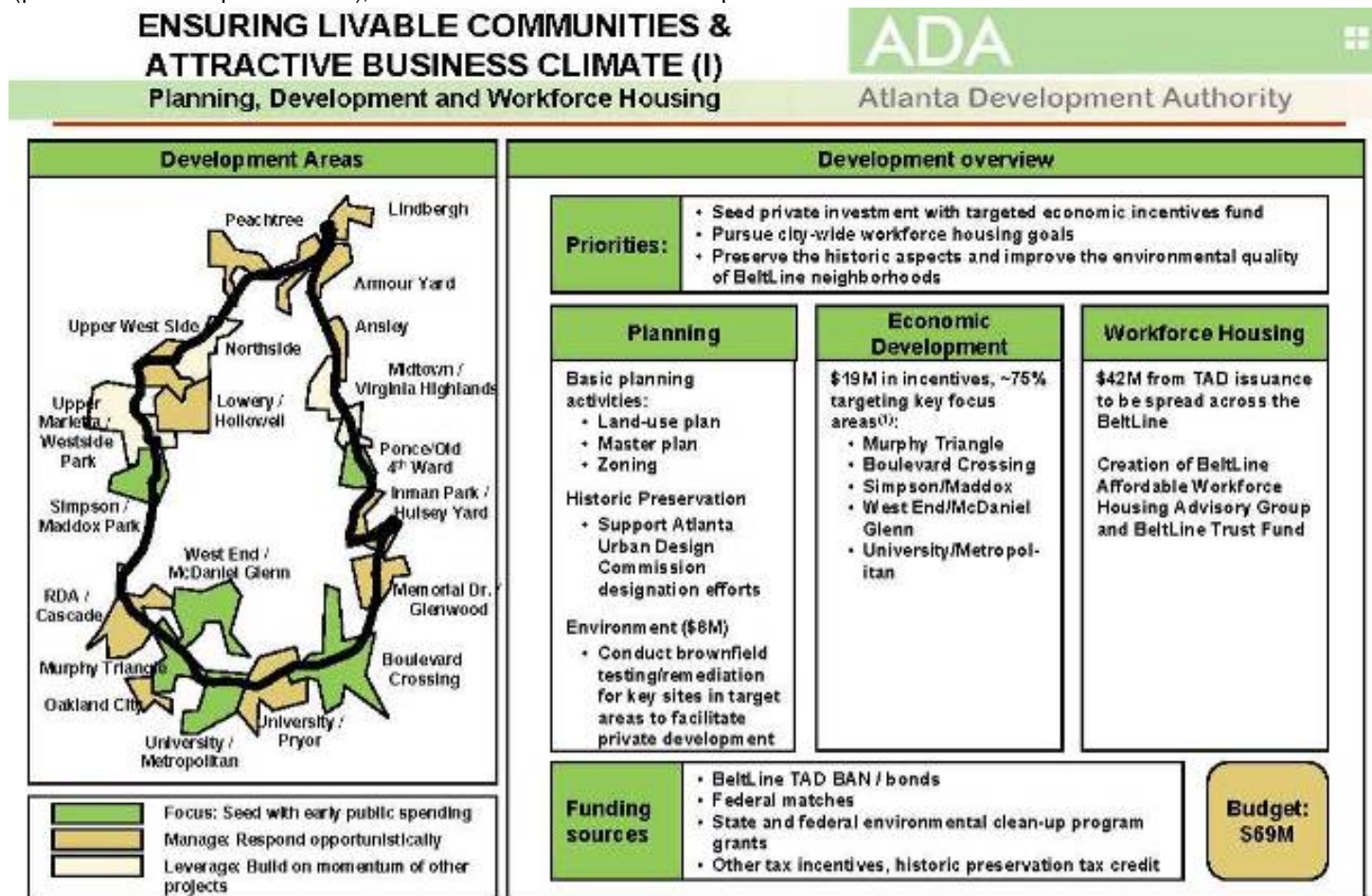
ABI or ACLT could hold these sites for disposition and development as affordable housing at some point in the future. Staff also recommended shifting unexpended rental dollars in the HTF to ownership downpayment programs.

The Recommendations and Best Practices chapter later in this report provides suggestions for creating a more robust Housing Trust Fund and increasing affordable housing production along the BeltLine.



Economic Development

Reflecting the language in Ordinance 05-0-1733, which initially established the BeltLine Redevelopment Area and Tax Allocation District, the detailed Project section of the Five Year Work Plan presents the concept of economic development in combination with livable communities and other objectives, as shown below. It is notable that the initial intent was to target \$19 M during the first five years, out of what was envisioned as a \$100M incentive fund (per the Redevelopment Plan), to stimulate economic development in five key focus areas: Murphy Triangle, Boulevard Crossing, Simpson/Maddox, West End/McDaniel Glenn, and University/Metropolitan.



(1) Economic development spending in Ponce/Old Fourth Ward is limited to transportation infrastructure projects and no economic development incentives

Five Year Work Plan Progress

The topic of economic development is difficult to review in terms of progress, due to varying definitions of the concept across different documents published by ABI and its partners.

For example, the recent “Reflecting Back, Moving Forward” presentation prepared by ABI (September 13, 2011) presents the graphic shown earlier in this report in terms of an economic development goal of 30,000 permanent jobs, and mentions the following achievements to date (under Ensuring Livable Communities and Attractive Business Climate):

- Complete basic planning studies; land use, street connectivity, greenspace
- Invest in development incentives, affordable workforce housing, preservation (historic and environmental), public art and transportation improvement to drive economic development

The remainder of this presentation devotes a slide to each of the other BeltLine components, but does not have a slide for Economic Development. Thus, in this most recent reporting, economic development appears to be more of an over-arching definition of other BeltLine components.

The ABI Annual Report 2010 does not mention economic development per se, but includes a page with a description of Community Benefit Guiding Principles (as developed by TADAC subcommittee and ABI). The same page also shows Workforce Development, announcing the first graduating class of a first source jobs program, and also states that “ABI is also working to attract services that residents desire to Atlanta BeltLine neighborhoods and to create new jobs in economically viable businesses.”⁶ Other documents reviewed for this report mention economic development in the context of community development benefits such as small business assistance and/or workforce training, and a 2009 ABI map shows the new real estate development projects built or

⁶ Atlanta BeltLine, Annual Report 2010, page 29.

planned along the BeltLine as the economic effect of its investments. Finally, financial reporting by ABI indicates that it has allocated \$643,000 to economic development incentives, but the use of these funds is not identified. ABI staff plans to formulate a more detailed Economic Development Incentive Policy in 2012.

Challenges

One of the key challenges to measuring progress in economic development along the BeltLine is the definition of the term. The following provides an overview of the three types of economic development that could be considered as fitting the BeltLine's goals.

- **Real Estate Development Incentives.** Many cities define new real estate development as a key type of economic development, bringing new private capital and investment to under-served neighborhoods. Transit and parks both have proven stimulus effects on attracting private investment and revitalizing neighborhoods. Incentive programs can be “carrots” or “sticks” in nature, offering everything from streamlined approvals of project plans to subsidies to publicly pay for portions of development costs (typically infrastructure or land write-downs), to full public-private partnerships where the public agency is an active participant by contributing land or other assets to a project. The Great Recession period, from 2008 to the present, has greatly reduced private sector development activity in Atlanta (as well as across the U.S.), making this aspect of economic development less active during the 2006 – 2010 work plan cycle, but likely more measurable in future years. It should be noted that despite the overall downturn, ABI publishes a map of private developments that have been built along the BeltLine.
- **Business Assistance Programs.** This aspect of economic development could be directly assisted by the Economic Development Incentives program to be developed by ABI. Programs can vary depending on the size and/or industry sector of the target businesses. Small business assistance programs, which can be structured to serve existing as well as new businesses, can include façade improvement loans (typically to existing retailers), technical assistance in business

planning and merchandising, and a myriad of programs targeting specific industry sectors or types of employers. To illustrate possible actions in this regard, see the next chapter for examples of these types of programs in Boston. Larger business assistance can range from site location services/site marketing, to direct subsidies or rebates to businesses locating in a specific zone.

- **Workforce Development.** This category of economic development typically targets a geographic area such as the BeltLine TAD, or a specific category of individuals such as unemployed workers skilled in a certain trade or industry. Workforce development typically implements specialized training programs, to retrain workers for specific types of jobs, such as solar panel installation or advanced manufacturing. Other workforce training programs start at a more basic level, to train for “job readiness” skills such as resume preparation and interviewing. In the BeltLine’s case, ABI adopted a Jobs Policy Framework in 2009, which directs construction projects in the BeltLine TAD to register with the City’s First Source jobs program, and also sets goals for amount of work directed at residents of the TAD. In addition, the Atlanta Partnership has focused on training for construction jobs anticipated to be generated by BeltLine projects.

One of the most powerful aspects of the BeltLine’s impact may be the ability to shape future economic activity through strengthening businesses and attracting new employers to the TAD, especially to the targeted activity centers listed previously. The Atlanta BeltLine has great promise, due to its combined ability to leverage place-making, transit, and funding. However, this promise has not yet been realized. Since the initial Work Plan identified five high-priority target areas, but ABI has not developed these programs yet, it is recommended that ABI consider formulating specific economic development strategies for each of these five areas, combining incentives to achieve new development along with business assistance and workforce development. The Recommendations & Best Practices chapter later in this report suggests methods to refine ABI’s economic development program to achieve all three types of economic development.

Conclusions

The preceding review of the Five Year Work Plan, including its achievements and challenges, forms a picture of an ambitious, potentially transformative Atlanta project. The BeltLine is perhaps most unique in that it started from a grassroots effort, among students and residents recognizing that Atlanta must shift its growth and investment patterns in the 21st century. The BeltLine shows the power of this idea: that everyday people can transform their city.

The BeltLine is also unique in its partnership and funding arrangements. Utilizing Tax Allocation Districts, the BeltLine is able to fully leverage and integrate philanthropic and foundation funds. Further, the BeltLine has tapped some of the best national expertise, such as the Trust for Public Land, to make its components achieve success.

Perhaps most unique to the BeltLine is the triple-pronged approach to revitalizing Atlanta's neighborhoods. Drawing from the best of contemporary knowledge about sustainable development, the BeltLine vision combines parks and trails with transit and affordable housing to incentivize private investment and attract jobs.

This ambitious and complex effort will take time, and setbacks will occur. Funding will fluctuate, real estate market cycles will rise and fall, and communities may not all receive fully equitable investments at a single point in time. During the research for this report, the authors were particularly struck by the common understanding and community support for these setbacks; local stakeholders expressed their support for the BeltLine vision and their excitement about early signs of success, particularly in the park improvements and trail segments already constructed.

Recommendations & Best Practices

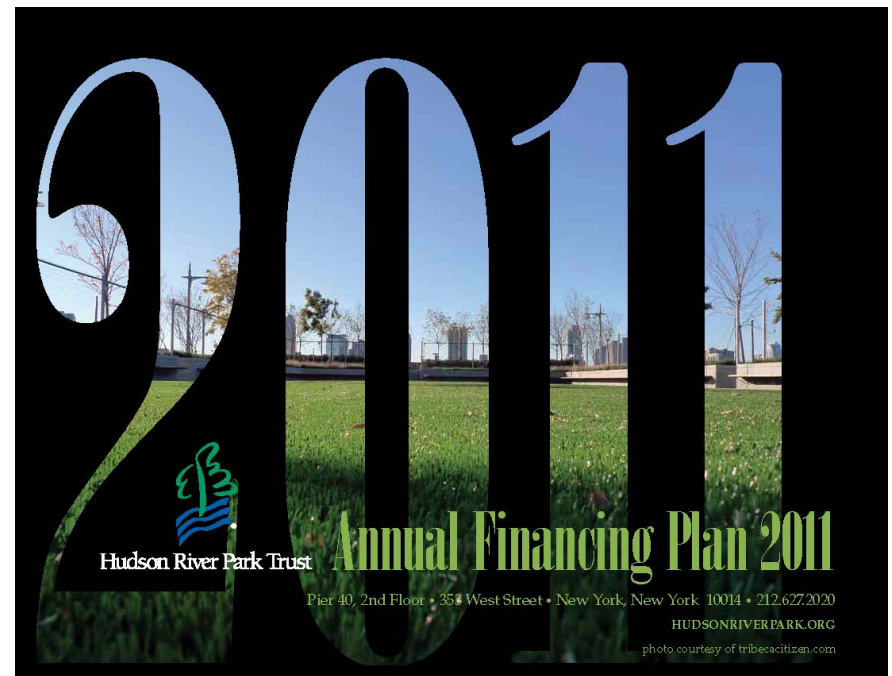
This chapter builds on the findings of the prior chapter, which identified key components of the Five Year Work Plan and described progress to date, along with gaps and potential refinements moving forward. The following provides a series of broad recommendations supported by “Best Practice” examples of how the BeltLine could be honed and focused on its ambitious objectives. Every effort was made to identify best practices which are up and running, show results, and have relevance to the BeltLine in terms of similar revitalization goals.

Recommendation #1: Develop Consistent Financial and Progress Reports

ABI has done an outstanding job of communicating its vision, goals, and general progress to stakeholders in the form of a myriad of web resources, community conversations, and quarterly and annual events. However, as described in this report, it is difficult to track each achievement through time, due to shifting formats, changing reporting mechanisms (particularly with respect to expenditures), and sometimes, changing or undefined terminology.

Best Practice: Hudson River Park Trust Annual Financing Plan

One of the key lessons that many large, long-term public projects have learned in the US is that transparent reporting is vital to maintaining public interest and elected officials’ commitment over time. An excellent example of communicating in clear, understandable, and comparative format, the achievements, progress, and expenditures of a major public improvement project is found in the Hudson River Park Trust in New York City.



The Hudson River Park Trust is a unique and ambitious organization formed as a partnership between the State of New York and the City of New York to manage the redevelopment and creation of parklands along a five-mile stretch of Manhattan along the Hudson River. It is also a 501(c)(3), enabling charitable donations. This ambitious project grew out of many events occurring in the 1970s and 80s, as activists challenged roadway development, shifting public policy towards greenspace to revitalize this valuable waterfront area.

The following outlines the Hudson River Park Trust (from www.hudsonriverpark.org).

“The Hudson River Park Trust is a partnership between New York State and City charged with the design, construction and operation of the five-mile Hudson River Park. Hudson River Park is the largest open space project to undergo construction in Manhattan since the completion of Central Park. As a public benefit corporation, Hudson River Park Trust is governed by a thirteen-member Board of Directors. The Trust employs a focused, diverse staff with experience in parks, design, finance, public policy, operations and maintenance. Both the Trust and the park itself are governed by the [Hudson River Park Act](#), a 1998 law that established both the park and its requirements. We operate on a premise of financial self-sufficiency, supporting the staff as well as the operations and maintenance of the park through income generated within the park area by rents from commercial tenants, fees concession revenues, grants and donations. Capital funding comes from the State, New York City and Federal budget appropriations. One special aspect of the Trust is its fifty-member Advisory Council which plays an integral role in the park planning process. The Advisory Council is comprised of elected officials and representatives from the business, environmental and civic communities.”

Among its activities, the Trust maintains an excellent web site including full presentation of several categories of financial information and plans (see web page screen shot here). Each year’s detailed financial statements are posted in sequence, allowing the public to easily access detailed reports. Each year’s upcoming annual full budget, with detailed

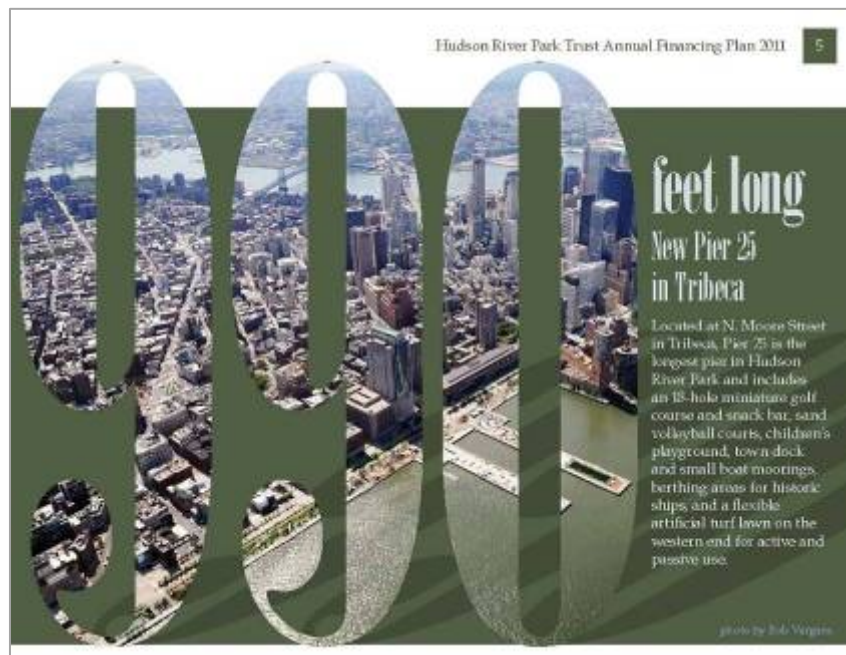
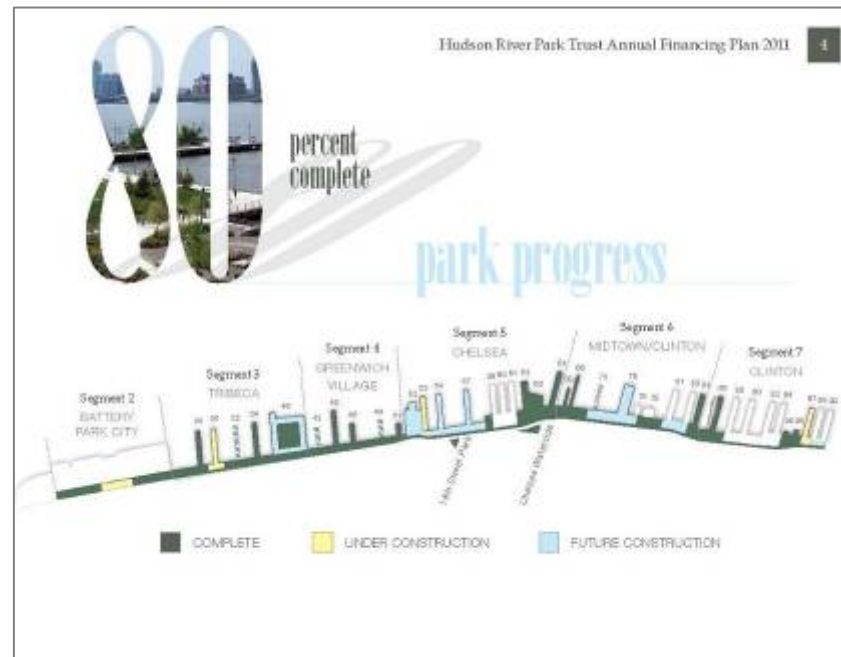
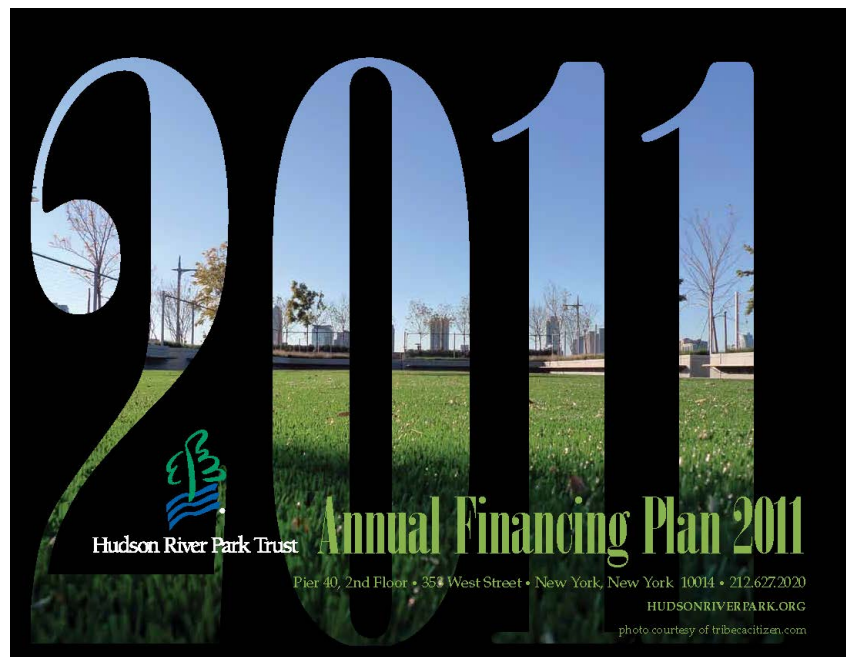
categories of expenditures, is also posted. The primary “best practice” is the third type of report called the Annual Financing Plan (shown as the middle column on the web page graphic below). Each year the Trust publishes an *Annual Financing Plan*, which graphically portrays achievements, presents the summary financial statements (balance sheet and operations) for a two-year period, looks back to list all sources and uses of capital funds, and looks forward to show upcoming known capital funding commitments. The document also lists the Trust’s partners and major donors. The key differences between this document and those published by ABI are that this document clearly shows two years of financial reports and changes between the two years, along with a ‘looking forward” list of capital funds and their allocations.

Thumbnails of selected pages of the Annual Financing Plan 2011 are shown on the following pages. The full document can be downloaded at www.hudsonriverpark.org. This is an excellent example of how to portray both achievements and spending, consistently and understandably, for a project with similar complexity and transformative potential to the BeltLine.

Figure 8: Web Page from Hudson River Park Trust Web Site



Figure 9: Sample Pages from Hudson River Park Trust Annual Financing Plan



Statement of financial position

ASSETS	2010	2009
Cash and equivalents	\$ 13,243,674	\$ 9,535,429
Investments	46,372,149	44,450,031
Accounts receivable	11,051,937	7,536,819
Prepaid expenses	19,671	5,651
Inventory	-	8,638
Deferred rent receivable	891,297	1,451,662
Construction in progress	196,913,548	226,130,329
Property and equipment, net	289,884,035	195,865,342
Total assets	\$ 515,277,941	\$ 481,203,201
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable	3,162,837	8,379,899
Accrued expenses	9,292,301	8,205,638
Total liabilities	12,455,138	16,585,537
Net assets		
Unrestricted	485,542,389	465,007,408
Temporarily restricted	21,276,234	30,135,756
Total net assets	\$ 506,818,623	\$ 495,143,164
COMMITMENTS AND CONTINGENCIES		
(notes 7 and 10)*		
Total liabilities and assets	\$ 515,277,941	\$ 481,203,201

* Complete Hudson River Park Trust financial statements, including notes 7 and 10, can be found at hudsonriverpark.org

Statement of activities

	Unrestricted	Temporarily restricted	Total 2010	Total 2009
OPERATING REVENUES				
Appropriations revenue	\$ -	22,135,155	22,135,155	33,824,032
Reimbursement	16,025,340	-	16,025,340	56,090,314
Lease revenues	2,413,544	-	2,413,544	5,803,754
Parking revenues	6,808,217	-	6,808,217	7,644,805
Federal grant	-	3,050,000	3,050,000	4,550,000
Other revenues	1,258,814	-	1,258,814	1,998,948
Contributions	118,543	-	118,543	91,735
Total operating revenue	32,234,268	30,185,155	62,419,423	100,053,528
NET ASSETS RELEASED FROM RESTRICTIONS	28,164,697	(28,164,697)	-	-
Total support and revenue	60,398,965	2,020,458	62,419,423	100,053,528
OPERATING EXPENSES				
Employee compensation and benefits	5,281,351	-	5,281,351	5,240,555
Park programs and maintenance	5,746,717	-	5,746,717	6,664,927
General and administrative	4,472,378	-	4,472,378	3,898,824
Total operating expenses	15,520,446	-	15,520,446	15,804,306
INCOME FROM OPERATIONS BEFORE DEPRECIATION AND AMORTIZATION	45,655,557	2,040,458	47,696,015	84,249,222
DEPRECIATION AND AMORTIZATION	(5,041,984)	-	(5,041,984)	(13,079,830)
INCOME FROM OPERATIONS	40,613,573	2,040,458	42,654,031	71,169,392
NON-OPERATING REVENUES - INTEREST INCOME	321,688	-	321,688	586,054
INCREASE IN NET ASSETS	40,935,261	2,040,458	42,975,719	71,755,446
NET ASSETS AT BEGINNING OF YEAR	465,883,408	15,275,756	481,159,164	399,013,664
NET ASSETS AT END OF YEAR	\$ 506,818,669	21,276,214	\$ 528,094,883	\$ 470,769,110

Capital funding

PARK IMPROVEMENTS	CAPITAL APPROPRIATIONS BY AGENCY (GOV'T) FY 2006-2011	CAPITAL COMMITMENTS	REMAINING
New York State	\$166,000,000*	\$162,579,378	\$3,420,622
New York City	\$185,200,000	\$181,625,713	\$3,574,286
LMDC (Lower Manhattan Dev Corp)	\$72,000,000	\$72,000,000	-
Federal DOT (Tos 531)	-	-	-
Refracted In Seg 3 "Greenway"	\$4,800,000	\$3,896,665	\$903,335
NYC Council	-	-	-
Balance restricted to Pier 40 value field	\$2,704,000	\$2,256,000	\$448,000
NYS Assembly	\$750,000	\$750,000	-
Manhattan Borough President	\$90,000	\$90,000	-
Total	\$411,572,000	\$449,336,756	\$62,233,244

* Includes \$1,000,000 for Interregional Museum pier

PARK THROUGH GRANTS AND FUNDING AGREEMENTS	
U.S. HUD - Interregional Museum	\$30,722,051
NYC EDC - Interregional Museum	\$91,265,194
FUNY - Pier 50	\$21,293,611
NYC EDC/NYPD - Tow Board/Pier 76	\$4,754,760
NYC DEP	\$23,097

Capital funding (cont.)

PROPOSED FY 2012 APPROPRIATIONS	
New York State	\$1,000,000 - Governor's preliminary budget
New York City	\$4,000,000* - Five-year capital budget

* subject to receipt of "matching" funds from NY State

PROPOSED FY 2012 NEEDS	
Tribeca	\$6,500,000
Midtown	\$4,500,000

FUTURE CONSTRUCTION - includes Gateway and Pier 30	
Pier 26 Extension	\$15,000,000
Pier 54	\$75,000,000
29th St. - 37th St.	\$20,000,000
37th St. - 43rd St.	\$4,000,000
Pier 57	\$20,000,000

FUTURE CAPITAL COMMITMENTS - includes:	
New York State	\$335,000 - DCIS Pier 26 extension planning grant
Pier Authority	\$5,000,000 - Capital grant for Pier 26 extension
New York City	\$28,500,000 - EDCNY - Pier 57 to Gateway extension

FEDERAL CAPITAL AUTHORIZATION	
WKDA program	\$10,000,000 - No budget appropriation

Recommendation #2: Reorganize Web Site

The BeltLine has evolved from a student's thesis to an ambitious undertaking with the help of numerous partner organizations and City departments. The primary website for the BeltLine, www.beltline.org, reflects a concerted effort to provide up-to-date information as well as a detailed archive of the evolution of the project, from initial studies through community conversations to final policy documents and a calendar of events.

During the research for this report, it was noted that the BeltLine's web site, while extensive, is organized in a way that causes the browser to have to search extensively for key items. Examples of this are somewhat buried "foundational documents" such as the Redevelopment Plan and the establishing legislation (both found in the Archives section, arranged chronologically so that less relevant items appear in long lists, burying these important resources). At the same time, key current governance items such as ABI Board meeting agendas and minutes, TADAC meeting minutes, and overarching work plan and funding reports are not readily accessible. In some cases, the secondary pages also explain key components of the BeltLine, but links do not flow logically to underlying resources. Moreover, some of the information affecting BeltLine activities is not on the Beltline website, but rather is found on the Atlanta Development Authority web site (without links back and forth). The key partner in the BeltLine, the Atlanta BeltLine Partnership, does not have a well-documented section, nor does it appear to have its own web site. Finally, key documents such as the City's CIP and Budget, both of which contain BeltLine information, along with the City's Comprehensive Plan, which highlights the BeltLine as a major initiative to meet affordable housing needs, is not linked to either the ADA or ABI web sites.

The BeltLine combines four major initiatives in one: parks, transit, affordable housing, and economic development. This broad, complex undertaking means that its web site structure will be challenging to create, but at the same time, the complexity underscores the critical need to organize material to be easy to find and accessible to the public.

Best Practice: Hudson River Park Trust Web Site

There are many web site structures that have evolved to present complex layers of information, organized around key functional themes.

One example, presented here because it is a similar unique organization profiled in the prior Recommendation, is the Hudson River Park Trust's web site at:

www.hudsonriverpark.org.

The Home Page of the web site is organized so that permanent categories of information are found across the top. These include:

- Organization and Policies
- Events
- Education and History
- Planning and Construction
- Estuarine Sanctuary

Each of these categories has a drop down menu of clearly labeled sub-categories of information, so that from the Home Page the visitor can see at a glance what the next page will lead to. For example, under **Organization & Policies**, the drop-down menu shows:

- Message from the Chair
- Board of Directors
- Staff
- Financial & Budget Information
- New York State Required Reports
- Policies
- Rules & Regulations
- Hudson River Park Act (the establishing legislation)
- Employment Opportunities
- Bids and Notices

This means that the casual visitor, seeking to understand what the Trust is, how was it started, and how much money it receives and spends each year, can do so within seconds of the initial view.

A click to Board of Directors goes directly to a consolidated page showing the Board Members, and to the right, showing the next Board meeting date, the link to the prior Board meeting minutes, and additional foundational document links. Thus, to see when the next Board meeting is scheduled and what it will discuss, what it discussed most recently, and who its members are, takes literally one click from the Home Page. (In contrast, to find this same information on the BeltLine web site takes numerous clicks to several different sections, none of which contain Board agenda or minutes).

The center of the Home Page has more news-worthy items, similar to the BeltLine web site. To the right on the Home Page, and on every subsequent page, another type of box is shown, with short informational items, depending on which page one is viewing.

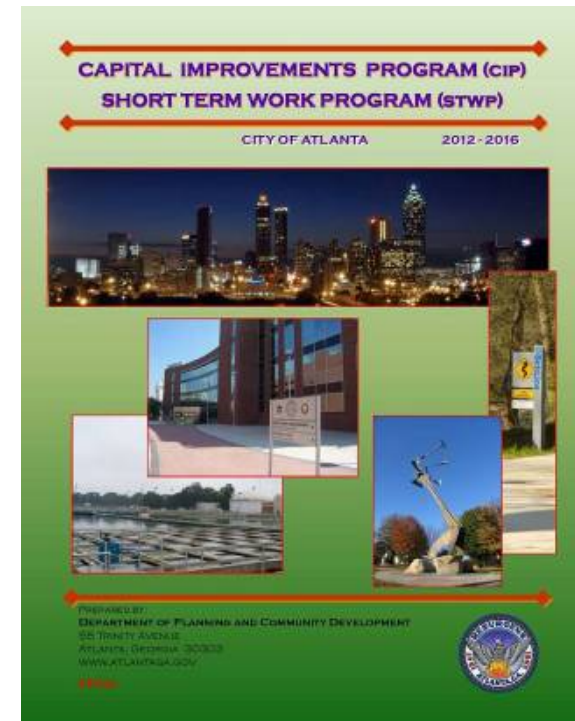
As another example of ease of use, one of the permanent categories at the top of the Home Page is Planning & Construction (similar to what the BeltLine web site contains). However, in this case, the next page in this sequence lays out an interactive segment map, and has a sidebar called “Planning History” which documents the list of planning documents in chronological order. Photos are also available on the same portal page (entitled “before” and “after” photos) to document the park’s history of progress.

Recommendation #3: Create Dynamic Work Plan Process Including Annual Updates

A striking aspect of the work for this report was the limited public description of the next Five Year Work Plan preparation process. This function, so vital to strong continued engagement with all stakeholders and advisory committees, should be set forth, discussed, and implemented in a systematic way. In addition, it is recommended that the Five Year Work Plan be updated annually to create a more dynamic process. This would accommodate changes in federal and state funding, identify new opportunities for projects and programs not previously envisioned, and incorporate strategic refinements as warranted.

Many larger public initiatives with components similar to the BeltLine undergo a 5-year planning and budgeting process, accompanied by a short- and longer-term work plan. For example, the City of Atlanta publishes a Five Year Capital Improvement Program (CIP), along with an annually updated one-year short-term work program. This work is also incorporated into the City of Atlanta's Budget⁷.

In addition, it is recommended that TADAC has more direct involvement in formulating and reviewing each Five Year Work Plan during its preparation period. If annual updates are undertaken, TADAC should also have a role in reviewing these draft documents. This part of the recommendation is made to fulfill the purpose of TADAC as an integrated advisory function for ABI activities, particularly as bond proceeds increase in future years, and all aspects of ABI's Work Plan are underway. Moreover, if the previous recommendations to improve financial reporting are adopted, the Work Plan formulation process would be further enhanced.



⁷ It is interesting to note that the Atlanta BeltLine appears in both the Capital Improvements Program (CIP) and the Budget, although details of upcoming work planned for the BeltLine are not provided. The City's Budget includes a forecast of capital funds for the BeltLine TAD, with FY 2012 anticipated to provide \$44 M, and future years anticipated to provide an additional amount in excess of \$20M for each of the next four years.

Recommendation #4: Enhance Advisory Committees' Roles and Procedures

One of the key aspects of the BeltLine which sets it apart from most other Atlanta revitalization efforts is the very specific legislation outlining the creation of two comprehensive advisory bodies: the Tax Allocation District Advisory Committee (TADAC) and the BeltLine Affordable Housing Advisory Committee (BAHAB).

Both bodies have extensive talent and experience in community development, revitalization, affordable housing, economic development, finance, and the myriad of issues which will continue to affect the BeltLine's transformative capacity. Both committees' talent pool, and stakeholder input are necessary to BeltLine's ultimate success. Unfortunately, while both committees have been formed and commenced operations, and both committees have published extensive recommendations since their inception, the current status of these advisory bodies indicates that they have not achieved their full promise.

A full set of recommended improvements to the mission, structure, operations, and improvements that could be implemented is beyond the role of this report. However, the following two "best practice" examples provide an excellent starting point to ABI and TADAC to resolve the issues which were noted during stakeholder interviews for this report..

Best Practice: Effective Use of Advisory Committees (Transportation Research Board, 2010)

The Transportation Research Board (TRB) funds summaries of best practices on topics related to transportation across the US. Specifically, *Effective Use of Citizen Advisory Committees for Transit Planning and Operations: A Synthesis of Practices (Transportation Research Board, 2010)*, offers an excellent summary of how transportation agencies across the US have utilized standing advisory committees.

The publication is available at:

http://www.trb.org/Publications/Blurbs/Effective_Use_of_Citizen_Advisory_Committees_for_T_163653.aspx.

The following provides quotes of this publication's conclusions (italics) followed by observations of how these conclusions can be applied to improve the functioning of TADAC and BAHAB:

1. *Clear expectations and communication about committee roles and responsibilities contribute to an advisory committee's success.* For TADAC in particular, there has been controversy around limiting its role to advisement on TAD funds, which is a very narrow interpretation of the establishing legislation and one with which TADAC disagrees. Since TAD funds will be integral to almost all of ABI's activities in the next five-year work program, it is recommended that ABI's narrow view be broadened to recognize that TADAC is authorized to provide organized input and collaboration on all ABI activities. Further, in order to fully ensure citizen participation and input it is imperative that TADAC have a direct liaison with Atlanta City Council through one of its designated committees.
2. *It is important that committee membership be carefully considered, and the need for representation of all viewpoints be balanced with the need to maintain a manageable committee size.* Both TADAC and BAHAB have had challenges maintaining active membership at the scale envisioned in the establishing legislation. Both groups have also struggled to maintain consistent meeting schedules and full documentation of agendas and meeting minutes. To be effective, both groups will require full staff support by ABI, to schedule and notify members of meetings, provide agendas and meeting packets, record meeting minutes, and publish this documentation online. In addition, it will be important to create an online presence documenting the work of these two advisory groups. At present, the ABI web site does not provide this documentation other than calendaring TADAC and BAHAB meetings.

3. *Agencies find value in the input provided by advisory committees and think of them as an indispensable part of the public involvement process. Most agencies reported serious consideration of advisory committee input and recommendations by decisions makers. In many cases, advisory committees reported their recommendations or input to decision makers in their own words through committee-authored written recommendations, committee presentations, or communication between a committee's chairperson and decision makers. For TADAC, this conclusion is key to improving its role and function for BeltLine success. According to stakeholders interviewed for this report, there is no formal process currently to transmit TADAC findings or advisement to the ABI Board. There are two clear options which could improve this situation: if ABI staff were available to support TADAC, this same staff person could be incorporated into ABI Board meetings to give a summary report at each meeting. Alternatively, TADAC membership could be expanded to include one or more ABI Board members within TADAC, enabling first-hand knowledge and communication between the two groups.*

Best Practice: California Redevelopment Project Area Committees (PAC)

California has approximately 400 redevelopment agencies, most with several legally defined Redevelopment Project Areas (defined with legal boundaries for tax increment financing and other purposes). Similar to the Tax Allocation District (TAD) formed for the BeltLine, each of these Project Areas has a Project Area Committee, which serves a key advisory role in the Project Area. Legally, a Project Area Committee (PAC) is required to be formed when there are a substantial number of low or moderate income residents in the Project Area and the proposed redevelopment plan either includes the authority of eminent domain or calls for public improvements that may result in the displacement of residents. Members of the PAC are elected representatives of residential owner occupants, residential tenants, business owners, and existing community organizations.

The PAC is required to review the proposed Redevelopment Plan and make a report to the legislative body during plan adoption, and the Redevelopment Agency is required to consult with, and obtain the advice of the PAC regarding affordable housing and general policy matters during the Plan's implementation.

The San Francisco Redevelopment Agency (SFRA), formed in 1948, has seven Redevelopment Project Areas and several additional "survey" areas (not adopted as legal redevelopment projects). All seven of the SFRA's Project Areas have a Project Area Committee. For example, the South of Market Redevelopment Project Area, with a Plan adopted in 1997, has a corresponding South of Market PAC (SOMPAC). This committee, comprised of 22 members, meets monthly. The PAC also has several subcommittees including Executive, Economic Development, and Housing, all of which also meet monthly. The South of Market PAC receives staff support from the SFRA, who takes minutes at each meeting and prepares the agendas. The staff person also reports to the SFRA governing body (the SFRA Commission) when matters of interest are taken up by the Commission.

More information regarding the South of Market Project Area Committee can be found at its extensive website at: <http://www.sompac.com/>. Examples of the SOMPAC meeting agenda and minutes can be found in Appendix F.



Recommendation #5: Develop Real Estate Partnership Guidelines

A key challenge which has arisen during ABI's first five years of operation has been the process followed to obtain a key segment of the right-of-way, described previously in this report. The full promise of ABI and the BeltLine requires a comprehensive set of real estate and public-private partnership guidelines, as ABI continues to engage in TAD expenditures to revitalize the BeltLine corridor. This need will become even more critical as ABI develops its economic development and development incentives programs. It will be important to establish a clear, transparent process of decision-making for investments in real estate projects, land acquisitions, and related public-private partnership ventures (P3s).

Best Practice: Public-Private Partnership Guidelines (GDOT, 2010)

The Georgia Department of Transportation (GDOT), like many state transportation agencies throughout the US, has been expanding its use of public-private partnerships to finance transportation projects such as toll roads, bridges, and related large capital investments in infrastructure.

In order to provide consistency in soliciting, selecting, and administering public-private partnerships, the agency published its Public-Private Partnership Guidelines in 2010. While ABI would need to adapt and refine this type of document, GDOT's Guidelines may provide a useful starting point. The graphic shown to the right provides a snapshot of the Table of Contents of the GDOT Guidelines.

The full document is available at:

<http://www.dot.state.ga.us/informationcenter/p3/Documents/P3%20Guidelines-Appendices.pdf>



Summary of Table of Contents: GDOT P3 Guidelines

- I. Purpose of Guidelines
- II. Overview of P3 Program
- III. Program Administration
- IV. P3 Project Identification, Screening and Selection
- V. Procurement Planning
- VI. General Requirements Applicable to Procurements
- VII. Request for Qualifications
- VIII. Review and Comment Process for Request for Proposals
- IX. Request for Proposals
- X. Transition to Project Implementation and Administration

List of Appendices

- Appendix 1 Definitions
- Appendix 2 Procurement Confidentiality Disclosure Agreement
- Appendix 3 Project Data Request Form
- Appendix 4 Project Screening and Evaluation Form
- Appendix 5 Project Risk Assessment Chart
- Appendix 6 Project Risk Allocation Chart
- Appendix 7 Conflicts of Interest and Ethics Policy

Recommendation #6: Create Parks/Trails Business Plan with O & M Funding Mechanisms

As noted previously in this report, the ongoing operations and maintenance of parks and trails to be developed by ABI has not received strong attention to date. This recommendation is made because it is vital to ensure oversight and funding to achieve the goal of a sustainable park and trail network, improving the corridor's quality of life for all residents and businesses.

Many new urban parks and park systems around the country have been challenged by diminished public dollars at the same time that the public desires well-maintained parks and trails in urban areas. This has led to a resurgence of creative partnerships, new and evolving funding mechanisms, and the need to strategically combine these functions into a comprehensive business plan approach with all partners. It is recommended that ABI and/or its partners, along with the City of Atlanta, undertake a detailed business planning process focused on funding mechanisms to provide a sustainable approach to ongoing operations and maintenance of parks and trails along the corridor.

There are many examples of creative funding mechanisms for urban parks and trails across the US. For many urban parks, the operating and maintenance funding challenges involve augmenting traditional spending by public parks departments to ensure sustained maintenance and preserve all park functions. The following provides an overview of type of mechanisms and approaches.

- **Park Conservancy.** This concept involves setting up a non-profit organization, typically with strong stakeholder guidance to garner support from residents and the business community. Conservancies can support, augment, and even sometimes actively manage park properties. This model has been especially successful in urban parks, such as the Bryant Park and Madison Square Park in New York City, and the Presidio of San Francisco (a National Park). Conservancies typically organize volunteer labor for some maintenance and upkeep functions,

along with strong private fundraising from donations and corporations. These activities augment, but do not replace, core funding for ongoing operations and maintenance provided by the local government.

- **Advertising and Sponsorships.** There are many arrangements that can be made for this category of funding. Managers of most public spaces seek to balance revenue from private sector advertising or sponsorships with public ownership, meaning that ads or displays of corporate logos are subtly implemented. For example, Hudson River Park employs a practice of allowing sponsorships of events, rather than permanent displays of corporate materials, resulting in temporary signage during events that are removed following the event. Some park districts or larger systems have taken a more systematic approach, initiating broad campaigns to raise funds, such as licensing merchandise with park images or names on the objects.
- **Concessions.** Some park systems have utilized leasing rights and concession agreements to implement extensive concessions programs, with private vendors paying the public sector park district for the rights to sell food or merchandise, provide tours, hold parties and events, and similar activities in public spaces. These programs can contribute substantial revenue, but also usually require strong oversight by public agencies to ensure best practices.
- **Agreements with New Development Projects.** If a new urban park is associated with sparking new nearby development, there are examples of value capture (the idea of charging private developers or residents for the benefits of being located in or adjacent to the park). This is a complex mechanism, and depends on the ownership and legal framework of the park land and the ways it can leverage park investments to link with new development projects. Since the Atlanta BeltLine will have involvement in development along the corridor in various ways, this option may have utility for large projects in which ABI or other public agencies play a partnership



Segway tours operated by concession in Golden Gate Park

role, so that in exchange for initial funding or development rights, ABI or the City of Atlanta would receive ongoing payments from new development projects.

- **Benefit Districts or Citywide Tax Measures.** Some urban park systems have been funded by broadly taxing either a defined area that benefits from the parks, or the entire geography served by the parks. One of the oldest systems to use this approach is the East Bay Regional Park District in the San Francisco Bay Area, which manages over 100,000 acres in 65 parks, and 1,200 miles of trails. The District spans two counties with more than 2.0 million residents. The District is funded by a special property tax applied to each property, which generates about 65 percent of the Districts \$190 M operating budget per year.

Recommendation #7: Refine Affordable Housing Program

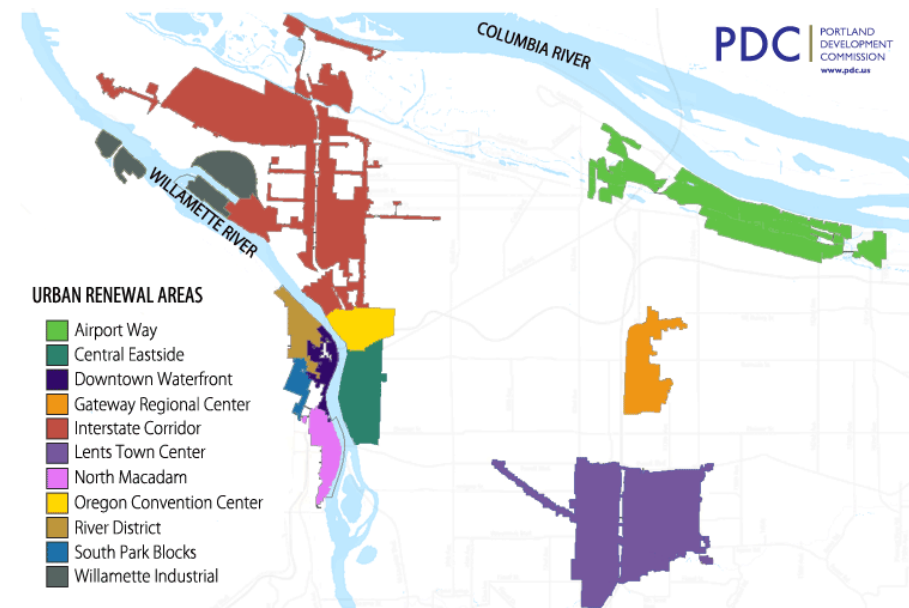
As noted in the previous section of this report, the BeltLine Affordable Housing Trust Fund has not yet achieved its potential. Progress is being made to refine the affordable housing program components. To augment this process, the following two best practices are presented: an overview of a long-standing commitment by the City of Portland to set aside a portion of its tax increment funds to produce affordable housing, and an example project which combines tax increment funds and 4% Low Income Housing Tax Credits.

Best Practice: Portland Affordable Housing Tax Increment Set-Aside Program

Similar to ABI's requirement to set aside 15 percent of TAD bond proceeds, the Portland Development Commission (PDC) has a long-standing requirement to set aside portions of its tax increment for affordable housing. The PDC is an independent agency of the City of Portland charged with revitalization and economic development in defined redevelopment areas; in Portland, these project areas are called Urban Renewal Areas (URAs). PDC currently manages economic prosperity and revitalization programs and projects in 11 URAs, including multiple downtown neighborhoods.

In 2006, the Portland City Council passed an ordinance establishing a TIF Set Aside in URAs, requiring all newly formed URAs to spend a minimum of 30 percent of total TIF resources on affordable housing. URAs that were in existence at the time of the passage of the ordinance were given specific set-aside requirements based on available resources and project pipelines. In general, the policy requires that set aside funds are spent on projects serving households with incomes at or below 80 percent of AMI (known as MFI in Oregon), although a limited number of units can be targeted to households earning up to 100 percent of AMI. The policy is designed to emphasize rental housing serving households at the lowest end of the

Figure 10: Map of Redevelopment Project Areas in Portland



income scale, requiring that 35 to 50 percent of set-aside funds are spent on rental housing for households earning 0 to 30 percent of MFI, and that 20 to 45 percent of set-aside funds are spent either on rental housing for households earning 30 to 60 percent of MFI or on ownership units for households earning 0 to 60 percent of MFI. These goals illustrate the deep commitment of the City of Portland and its elected officials to generating a robust, targeted affordable housing funding source which addresses those households with the greatest need for affordable housing assistance.

PDC's affordable housing program has resulted in the expenditure of \$153 M of set-aside funds during the first five years of implementation, exceeding the goal of \$121 M. This dramatic success includes 31 percent spent on rental housing serving households earning from 0 to 30 percent of MFI, with the balance serving households between 30 and 60 percent MFI.

At the time of adoption of the ordinance, the Portland Development Commission (PDC) was responsible for implementation of the Set Aside policy. In recent years, the PDC Housing Department merged with the City's Bureau of Housing and Community Development, forming the Portland Housing Bureau (PHB). The TIF Set-Aside, as a result, was shifted over to the new PHB in order to refine and increase unit production. The consolidation allows for deeper income targeting by facilitating the leveraging of Set-Aside funds with other HUD and state housing programs. Projects developed using TIF Set Aside funds typically utilize ten to twelve different funding sources, including Low Income Housing Tax Credits, a bond program available through the State of Oregon, Community Development Block Grant funds, HOME funds, project-based Section 8, and private debt.

Best Practice: Utilizing Low Income Housing Tax Credits with Tax Increment Financing

The Federal Low-Income Housing Tax Credits (LIHTC) program is the most important source of equity for affordable housing development in the US. Issued annually, these credits are sold to investors, generating equity for qualifying rental developments serving households with incomes below 60 percent of the Area Median Income (AMI). Although the LIHTC is a federal program, it is administered principally through state housing finance agencies. In Georgia, the Department of Community Affairs (DCA) is the state agency which oversees the allocation of competitive nine percent tax credits as well as four percent tax credits which can be used in combination with tax-exempt private activity bonds.

As noted previously, research for this report indicated that ABI staff have been advised that 9% Low Income Housing Tax Credits used to finance new developments in combination with TAD bond proceeds may not be feasible, due to interpretation of federal regulations. While this finding is not documented, it has been circulated as a reason to avoid using Low Income Housing Tax Credits as a resource. The authors of this report cannot provide legal interpretations of this finding; but recommend that it be further documented and clarified for the Atlanta BeltLine.

As an alternative, 4% Low Income Housing Tax Credits are often used throughout the US for the acquisition and rehabilitation of existing properties, as well as for development of new units. Any housing project that is financed with a tax exempt bond such as those issued by ABI and that serves households earning below 60 percent of AMI would automatically be eligible for 4% tax credits. Project sponsors include for-profit developers, non-profit organizations and public agencies like Housing Authorities. One recent award-winning project which used 4% Low Income Housing Tax Credits in conjunction with tax increment bond proceeds is Tassafaronga Village in Oakland, California. This development includes a mix of rental apartments and townhomes available to low-income households and has been an anchor in revitalization efforts for the surrounding East Oakland neighborhood.

Figure 11: Tassafaronga Village, Oakland CA



Recommendation #8: Stimulate All Aspects of Economic Development

As noted in the prior chapter, economic development has been defined or mentioned during the BeltLine's first five years in a variety of ways. The recommended approach is to refine and clarify the definition of economic development for the BeltLine project more specifically, into three subcategories: real estate development incentives, small business assistance, and workforce training.

This refined framework will enable more targeted incentives and technical assistance, along with the ability to measure and track outcomes. This approach may also tie well to the nearly-completed Decision Support Tool, which can be structured to reflect and measure need for these same categories of economic development before or as investment decisions are made.

Best Practice: Incentives for Transit Oriented Development (TOD)

The Columbia Heights neighborhood of Washington, DC stands out as a national model for urban revitalization mixing destination retail, mixed-income housing and community facilities. This neighborhood has been successful at generating commercial sales in a formerly underserved retail trade area, while also providing local residents and business owners with economic opportunities and housing choices.

In 1999, the District of Columbia government announced a revitalization initiative for Columbia Heights focused around the Columbia Heights Metro Station, which opened that year. This sparked the transformation of the neighborhood, bringing economic development and residents back to Columbia Heights. Since 2000, nearly 700,000 new square feet of retail and over 3,000 residential units have been developed in the area surrounding the Metro Station.

The primary asset utilized by the District to incentivize revitalization was the large amount of city-owned land acquired in earlier decades. Through the ownership of strategically

located properties, the District was able to exercise control over new development and attract quality developers by offering relatively low land costs.

The District also incentivized retail development through providing financing for a new \$40 million parking garage at the DC USA shopping mall, the catalyst retail component of the neighborhood's transformation. In exchange for the assistance provided by the District of Columbia, numerous community benefits were secured from developers including the inclusion of affordable housing units in market-rate and luxury developments, and expanded retail services. Another benefit, reported by the District's transit agency, has been higher than projected usage of the Columbia Heights Metro Station.

Figure 12: New Retail and Residential Development in Columbia Heights



Best Practice: Small and Medium Business Assistance in Boston, MA

The City of Boston offers a suite of programs and resources to recruit, retain and expand small businesses. These programs are administered either by the City's Office of Business Development (OBD), which is part of the Department of Neighborhood Development, or by the Boston Redevelopment Authority (BRA). Both the OBD and the BRA are overseen by the City Council's Committee on Economic Development & Planning. This overview describes three programs whose target audiences consist primarily of small businesses: ReStore Boston, the Back Streets program, and Create Boston.

ReStore Boston. Run by the Office of Business Development (OBD), ReStore Boston is a citywide program that assists neighborhood business and property owners with storefront renovations. These investments often result in an immediate increase in retail sales, and/or help landlords rent their vacant or difficult-to-rent properties. The visual effects of the program also benefit nearby businesses by rendering the commercial district more attractive and inviting, which in turns attracts new customers and businesses. City staff credit the ReStore Boston program as playing a major role in revitalizing previously distressed commercial corridors throughout the City of Boston.

The program began as a Mayoral initiative in 1995, with the objective of reversing blight and disinvestment in the Blue Hill Avenue in Roxbury. The results were so successful that, in 1996, the initiative became a permanent citywide program. Since its inception, ReStore Boston has completed more than 1,000 storefront improvement projects and provided professional design services to many more. Improvements have included new signage, building and sign lighting, removal of roll-down grills, installation of awnings, repair or replacement of storefront windows and doors, and restoration of exterior finishes.

ReStore Boston provides matching grants (up to \$7,500 per storefront) to help complete storefront renovation projects. All grantees must meet eligibility criteria. A separate signage component (\$2,000 grants) provides assistance on a non-matching basis for signage improvements. In addition to funding, ReStore Boston provides professional architectural design services at no cost to ensure high quality improvements.. OBD staff estimate that \$1



in program grants leverage \$4 in private investments. The program has an annual budget of approximately \$1 million, which is funded primarily through Community Development Block Grant (CDBG) funds. However, since ReStore Boston is a citywide program but CDBG funds can only be used to benefit low- and moderate-income households, storefront improvements in wealthier neighborhoods are funded through the City's General Fund.

ReStore Boston has benefitted from consistent staffing since its inception in 1995; this extensive institutional memory has resulted in small but regular improvements to the program's design, which in turn have resulted in greater cost-effectiveness and streamlined procedures. For example, staff no longer issue RFPs, as this outreach method has resulted in an unwieldy volume of applications. Instead, staff identify targeted community needs and viable projects through on-the-ground interactions, comments during public meetings, and longstanding relationships with local leaders. OBD has also begun advertising the program through Facebook and Twitter, in order to raise the profile of its grantees and encourage the public to frequent their businesses. Moving forward, OBD staff expect to further modify the program administration procedures in order to accommodate tightening city budgets.

Boston Back Streets. Boston's Back Streets program is a portal through which the City's industrial sector can quickly and seamlessly access a range of land use and business assistance strategies. The term "back street businesses" generally denotes small to medium size light industrial or commercial businesses that create products or provide services in manufacturing, wholesale, commercial, logistics, construction, and food processing. "These Back Streets companies are an important part of our local economy," noted Mayor Thomas Menino upon announcing the initiative. "There are more than 4,000 of them in our city. Few have more than 50 employees, but together they provide more than 100,000 jobs. That means that one in five jobs in Boston comes from this little-

known sector of our economy.”⁸ Further, according to data compiled by City staff, Back Street businesses pay salaries that are double what is offered on “Main Street” and their workers are more likely to be racial and ethnic minorities – making the businesses important stakeholders in achieving social equity.

In 2001, the City’s economic development office identified that profitable and well-established Back Street businesses were leaving Boston because they lacked the resources they needed to grow. There were problems of inadequate space, competing land uses, insufficient parking, and difficulty navigating through the bureaucracy of City Hall. Further, though successful programs were in place to assist “Main Street” businesses (office and retail that typically sell products directly to the consumer), industrial firms were not formally organized and felt overlooked by “Main Street” business organizations. Given the importance of Back Street businesses to Boston’s economic and social goals, Mayor Menino responded by launching the Back Streets program in November 2001, with stated goal of creating the conditions where the City’s small and medium-sized industrial and commercial companies could grow and prosper.

The program began with a comprehensive assessment of the city’s industrial zones to determine current land use and anticipate growth needs of businesses operating within them. The City of Boston adopted the goal of no net loss of industrial space, to ensure a sufficient supply of suitable land. To protect industrial land from residential or institutional conversion, the City strengthened the zoning review guidelines. Transportation studies were also conducted, and new plans devised to improve the flow of goods, employees, and customers. Existing small business services that once were scattered among several agencies were made accessible through Back Streets District Business Managers, who now serve as points of contact for business owners.

⁸ VanBelleghem, L. August 2002. “Network Notes: Boston Back Streets Get a Boost.” *Main Street Story of the Week*. 189. Available at: <http://www.preservationnation.org/main-street/main-street-news/2002/08/network-notes-boston-back-streets-get-a.html>

Today, the Back Streets program serves as a “one stop” portal for small industrial and commercial businesses. A team of business managers serve as ombudsmen to the Back Streets business community, serving as advocates, problem-solvers, and guides through zoning and permitting processes. Business Managers develop long-term relationships that allow them to direct businesses to appropriate City contacts and resources, including industrial planning services and business technical assistance offered by the Boston Redevelopment Authority. For example, in order to help growing and new companies find the space they need to operate successfully, the BRA operates an industrial site finder portal that taps into internal city resources as well as information from real estate brokers in order to track and suggest suitable locations. Many Back Streets businesses also use BRA’s job readiness services such as career centers, English language and job training programs, in order to find and train workers. Finally, the Business Managers help direct financial resources towards the Back Streets business community, including low interest rate loans and tax exempt financing.

Create Boston. In an October 2005 report, the Boston Redevelopment Authority found that Boston’s creative industries provide 30,000 jobs – more than Boston’s entire retail trade – and generate \$10.7 billion in annual revenues. Following the release of this study, Mayor Menino and BRA Director Mark Maloney launched Create Boston, a “clearinghouse” program focused on the City’s creative sector. The program’s design is based on that of the successful Back Streets program: Create Boston serves as a one-stop shop to help creative companies tap into city resources, including assistance with site location and permitting, low interest loans and financing, workforce development opportunities, and business advocacy. The program identified six creative disciplines: media, design, film, music, performance art, and crafts. The targeted beneficiaries can be commercial or nonprofit entities, ranging from musicians, artists, and writers to graphic designers, publishers, architects, and art galleries.

Create Boston is focused on business development and job creation for creative industries, which can entail services ranging from training programs to low-cost capital improvement funds to assistance establishing a curb cut or loading zone. The program is

closely tied to BRA's artist housing and certification efforts and the work of the Mayor's Office of Arts and Cultural Development. The Program Manager also assists with business plan development and business expansion plans.

One of the early accomplishments of Create Boston includes building a network for the video game industry with the goal of raising Boston's profile as a global leader in gaming. In 2009, Mayor Menino established the first Boston Game Industry Steering Committee to work collaboratively with the city administration, paving the way for business-friendly policies and mutually beneficial public awareness of contemporary video game issues. One of the committee's recommendations was launched in March 2009: poweringupBoston.com. This Boston-area game industry website serves as a centralized portal where industry affiliates can find and disseminate topical information with the city, their future workforce, and each other.

The Back Streets program and Create Boston are funded by the Boston Redevelopment Authority, which in turn derives 78 percent of its budget from rental and lease income and an additional 10 percent from the sale of land and buildings.⁹ At present, Back Streets funding is limited to one full time staff person who serves as the Business Manager for all Back Street businesses; this staffing represents a reduction from 4 FTEs at the program's peak. Create Boston also has one full-time staff person.

As part of the Boston Redevelopment Authority, the Back Streets Program and Create Boston are overseen by the BRA Board of Directors, which includes five members. Of these, two have served on the board for over twenty years. In addition, Create Boston benefits from the Create Boston Advisory Committee, a team of experts and practitioners from creative fields.

⁹ Boston Redevelopment Authority. *Operating Budget for Fiscal Year 2010*. Available at: <http://www.bostonredevelopmentauthority.org/pdf/documents/Budgets%20for%20BRA%202010.pdf>

Appendix A: About BAE Urban Economics

Since 1986, BAE has focused on creating sustainable communities by providing real estate economics and development advisory services to clients throughout the U.S. BAE's experience ranges from statewide policy studies, to strategic plans, to development projects. Our work reflects our commitment to excellence and dedication to the future of our places.

BAE's services include feasibility studies, strategic planning, revitalization, public-private transactions, public financing, fiscal and economic impacts analyses, and development advisory services. We have worked for more than 1,700 clients in the public, private, and non-profit sectors. We have particularly deep expertise in transit-oriented development (TOD), affordable and workforce housing, and urban parks.

Headquartered in the San Francisco Bay Area, BAE also has branch offices in Sacramento, Los Angeles, Washington DC, and New York City.

Our key asset is our highly-skilled staff, many of whom have worked together for over 20 years. Collectively, we bring our training in real estate development, city planning, geography, economic development, and public policy to every engagement. We have created innovative GIS tools for smart growth planning, and provided real estate advisory services to some of the largest sustainable development efforts in the U.S. The outstanding quality of our work has been recognized by the American Planning Association (APA), the Congress for New Urbanism, and other organizations through numerous awards for excellence. BAE is certified women-owned enterprise (WBE) and a certified Green Business. For more information, please see www.bae1.com.

Appendix B: Plan of Work for 2006 – 2010 Budget

ATLANTA BELTLINE PROJECT

Plan of Work for 2006-2010 Budget

July 5th, 2006

Purpose

Context

“5-year Detailed Vision” and Work Plan

Next Steps

Appendix

The purpose of this document is to outline:

- Key components of the BeltLine that will be financed within the first five years
- Rationale for decision-making
- Relationship among components that lead to an optimal 5-year plan
- Proposed budgets for the first five year period with initial “best estimate” allocations by year (e.g., dependent on when land is available)

Due to confidentiality in negotiating land acquisitions, specific parcels can not be addressed at this time; however, before properties are actually acquired, they will be presented and discussed following the standard city land acquisition process

City Ordinance 05-O-1733 Nov 7, 2005 Section 14: The Redevelopment Agent shall develop a work plan for implementing the BeltLine project with proposed budgets for the initial one, three and five year time periods of the TAD. Among other things, the work plan shall explain how components of the BeltLine project work together and reinforce each other in an optimal manner. At least 60 days prior to the first bond issuance, the work plan shall be presented to City Council for review and adoption.

Enabling legislation requires City Council adoption of a work plan prior to issuance of the first Tax Allocation District (TAD) Bonds

A budgetary plan is a practical necessity to prioritize projects, allocate funds, and manage spending and projects

- **The 5-year budget represents only 15% of the total 25-year funding, so priorities had to be established**
- **Projects selected to create an integrated strategy that reinforces momentum of the BeltLine and ensures future funding**

Important to establish clear guidelines and direction to “jump-start” BeltLine Inc as a start-up entity

- **Fundamental principles created to guide decision-making**
- **Projects identified for implementation in first five years**

Funding and cost data presented in this document are based on the most recent estimates available:

- **Plan is based on limited and conceptual engineering studies. Budgets may be adjusted to accommodate for increases or decreases to construction costs based on further studies**
- **Purchase prices are based on best available information, but prices are subject to fluctuations**
- **Critical opportunities or circumstances may arise that are a one-time opportunity for the 25-year BeltLine Vision that may require immediate non-TAD funding**

Purpose

Context

- History and 25-year Vision of the BeltLine
- Prioritization process for five year budget
- Sources of funds in first five years
- Input from technical experts and the community

“5-year Detailed Vision” and Work Plan

Next Steps

Appendix

THE BELTLINE IS A \$2.8B REDEVELOPMENT PLAN THAT SPANS 25 YEARS

Opportunity

The BeltLine is one of those rare projects that has the extraordinary potential of...

- Transforming Atlanta via visionary use of our rail legacy
- Improving quality of life for all residents
- Connecting neighborhoods with parks, trails, transit and transportation
- Ensuring growth across livable neighborhoods
- Engaging the community in shaping Atlanta's future

Vision

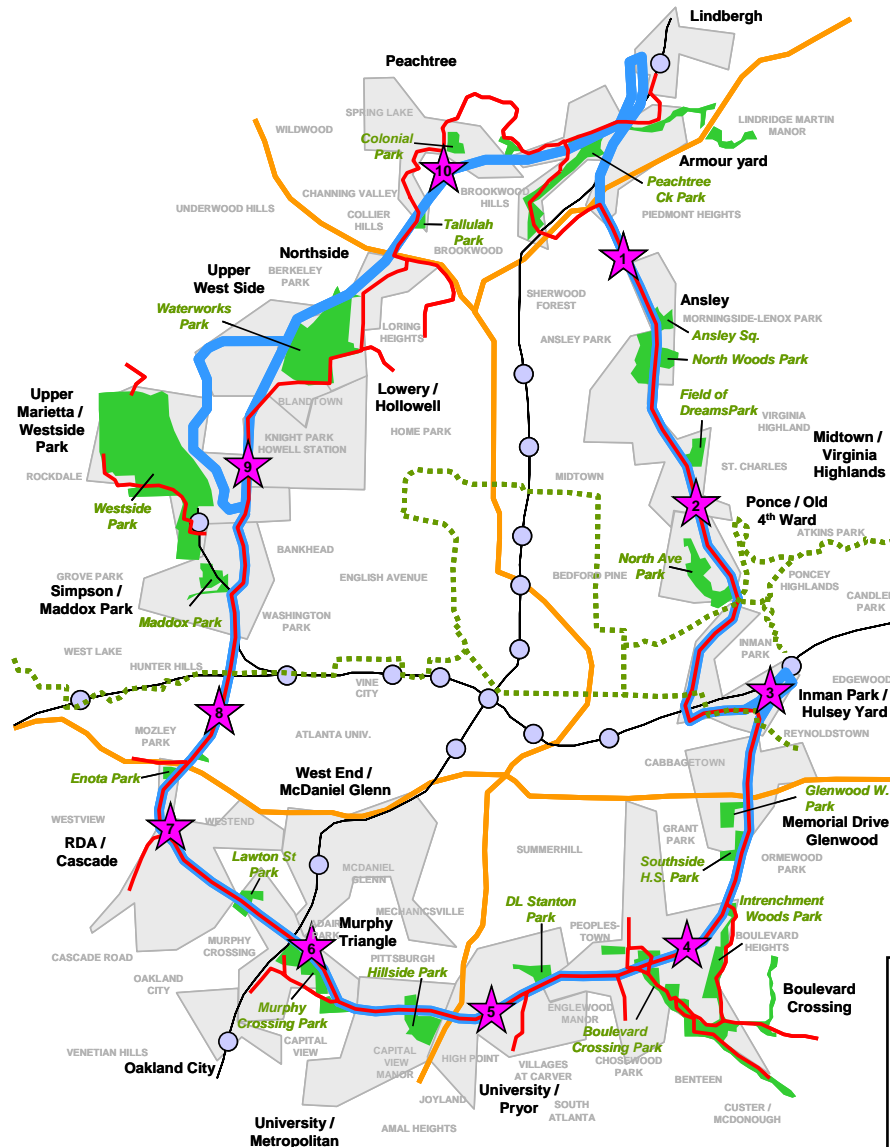
Since conception, much work has contributed to defining the Vision of the BeltLine

- Masters thesis by Ryan Gravel first proposed the project
- Emerald Necklace study by Trust for Public Land added new elements to the BeltLine
- TAD Feasibility Study, Bond Finance Projections and Fiscal Impacts Analysis validated economics
- Redevelopment Plan presented the comprehensive view of the BeltLine

Achievements

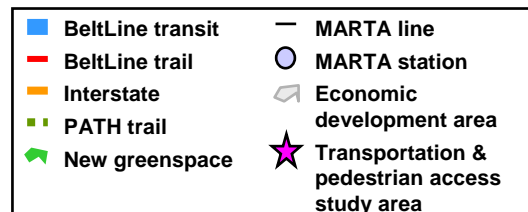
BeltLine has recently gained momentum

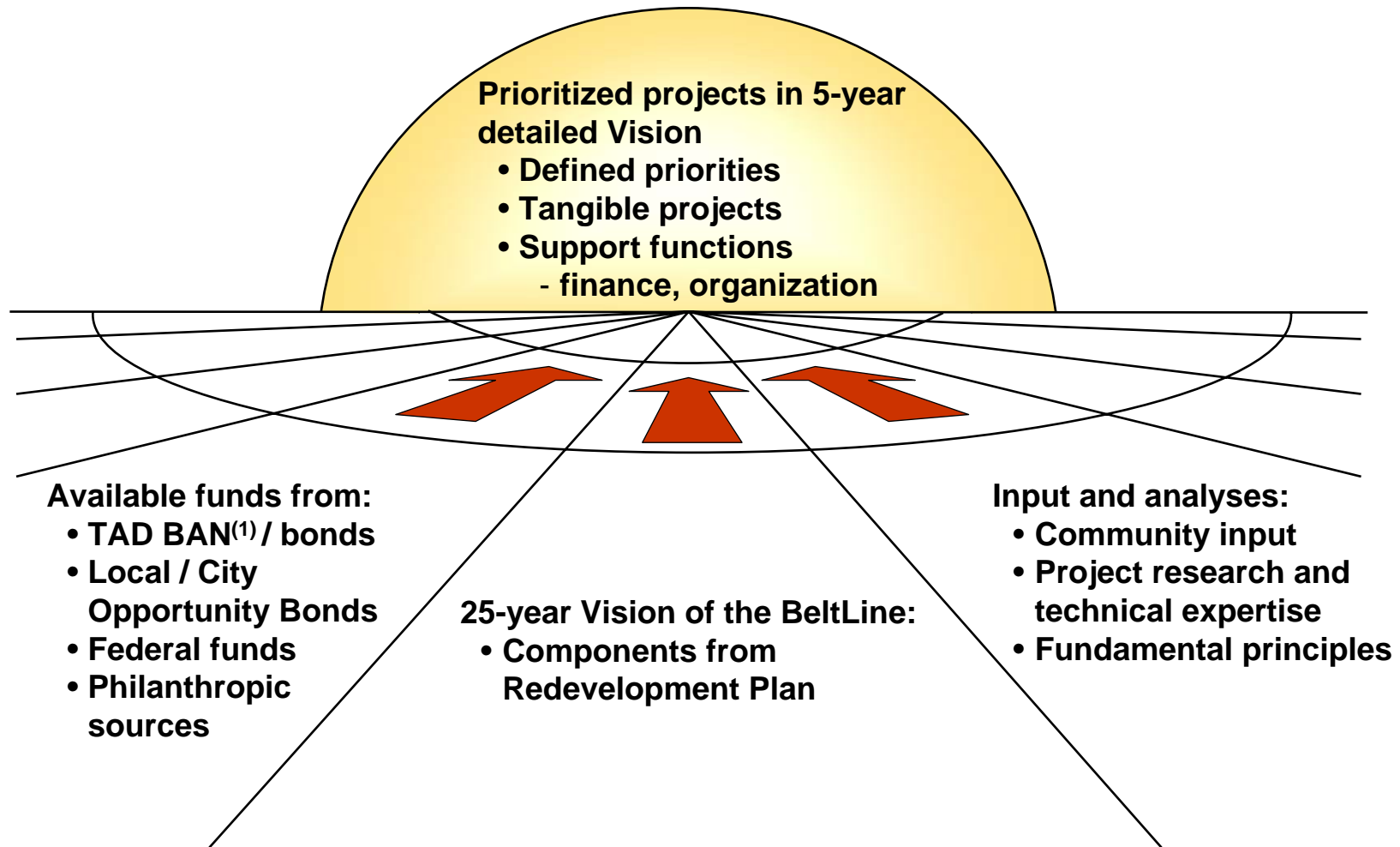
- TAD approved by City Council (12-3), Fulton County (5-1) and Atlanta Public Schools (7-0)
- Greenspace Opportunity Bonds approved which include funds for parks along the BeltLine
- Bellwood Quarry secured for Westside Park, the "Jewel" of the BeltLine
- Extensive community engagement initiated



Key attributes of the BeltLine

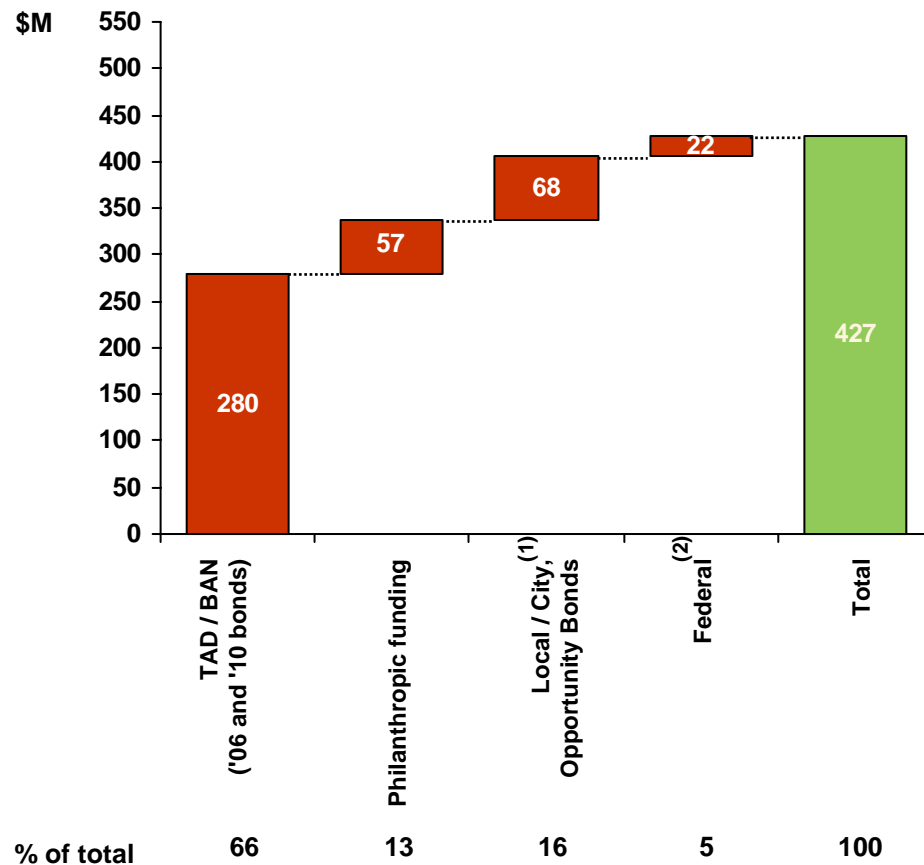
- Nearly 1,300 acres of new greenspace
- 33 miles of trails
- A 22-mile loop of transit
- ~30,000 new jobs in 20 economic development areas
- 5,600+ affordable workforce housing units
- Touches and connects 45 neighborhoods
- Investments in transportation / pedestrian access and streetscapes, public art, historic preservation and environmental clean-up





(1) BAN- Bond Anticipation Note, a cash flow mechanism, that is issued prior to TAD issuance and is repaid by the subsequent TAD bond

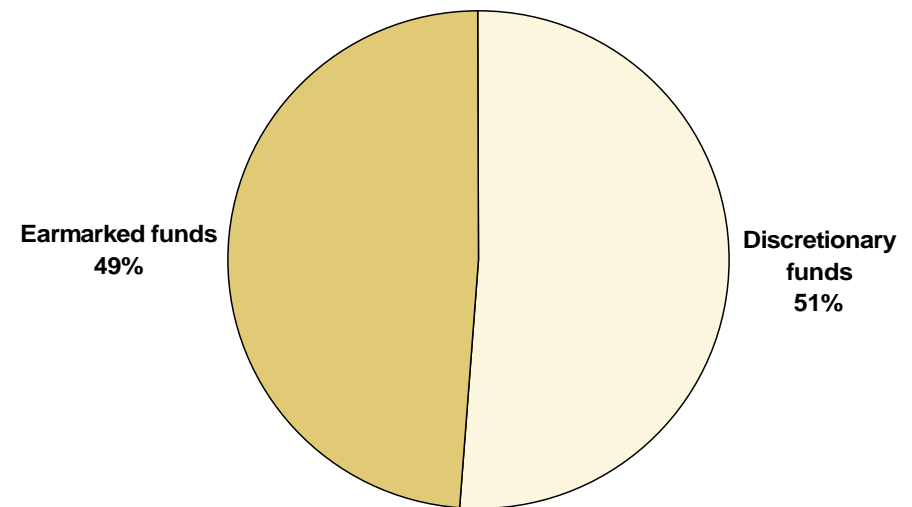
Funding for BeltLine, 2006-2010 projected to total \$427M...



(1) Includes Department of Watershed Management funds
Source: BeltLine Partnership / ADA

(2) Includes Atlanta Regional Commission Transportation Improvement Program (TIP) funds for corridor

...but much of the funding is earmarked



Earmarked funding includes:

- TAD obligations
 - Affordable Workforce Housing
 - Financing costs
- Philanthropic support
 - Parks and trails
- Quarry acquisition
- City Greenspace Opportunity Bonds
- Federal sources

RESEARCH AND TECHNICAL EXPERTS PROVIDED INPUT

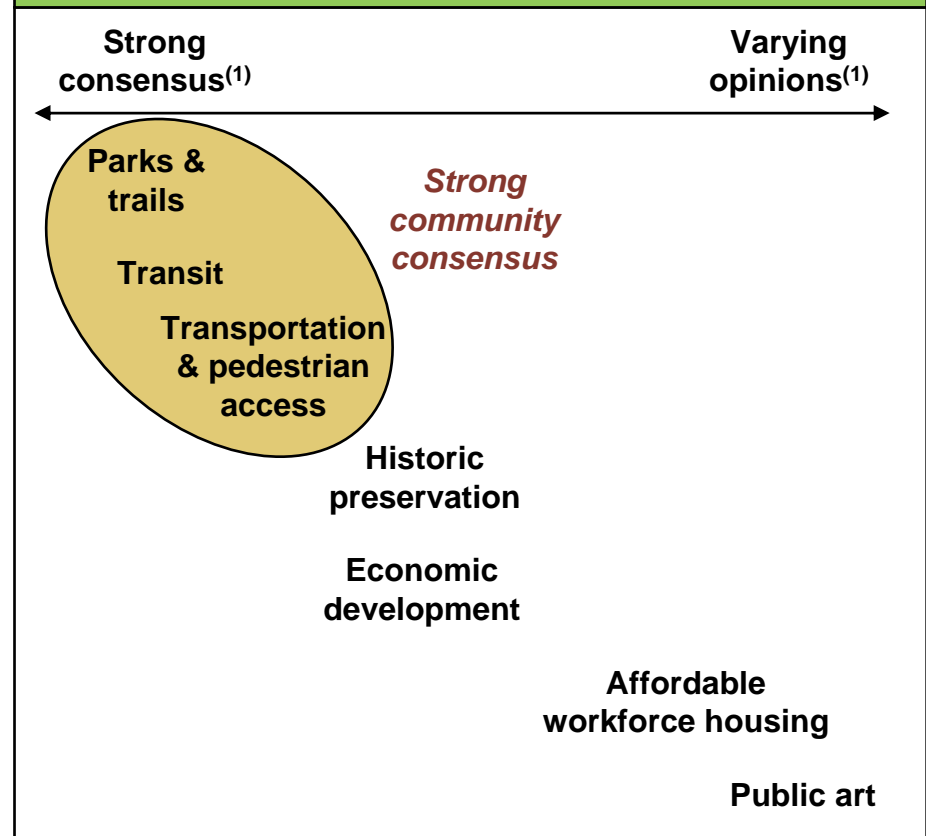
Element	Key components of Redevelopment Plan	Requirements	Activities to determine priorities and sequencing
Greenspace: Parks and Trails	<ul style="list-style-type: none"> • Construct 1,277 acres of new greenspace in 25 parks • Build 33 miles of multi-use trails connecting parks 	<ul style="list-style-type: none"> • Estimate acquisition and construction costs • Determine available parcels of land 	<ul style="list-style-type: none"> • Costing and engineering studies; Emerald Necklace Study
Transit	<ul style="list-style-type: none"> • Plan and construct 22-mile loop of passenger transit • Determine funding sources for transit system 	<ul style="list-style-type: none"> • Ascertain topographical and alignment issues • Investigate technology and connectivity options 	<ul style="list-style-type: none"> • MARTA Beltline Alternatives Analysis; National research and benchmarking; other transit related studies
Planning and Economic Development	<ul style="list-style-type: none"> • Conduct road and streetscape improvement projects in 10 sections of the BeltLine • Plan economic development around development sub-areas • Create 5,600+ units of affordable housing • Determine usage of incentives funds to attract investors 	<ul style="list-style-type: none"> • Align design and engineering with transportation and pedestrian needs <ul style="list-style-type: none"> - especially in high density areas • Determine environmental and economic needs within development areas • Research analogous city projects for potential incentive programs 	<ul style="list-style-type: none"> • Transportation studies; Geographic Information Systems database construction; Atlanta Urban Design Commission Historic Resource Survey; City managed brownfield inventory; identification of potential redevelopment areas; existing Neighborhood Redevelopment Plans

(1) As of May 19th 2006
(2) BeltLine population and participation percentages were calculated on the basis of City of Atlanta zip codes. % of respondents / % of population: NW – 36% / 30%, NE – 34% / 27%; SE – 16% / 22%; SW – 14% / 21%. Excludes 1,375 surveys received from respondents outside of BeltLine identified zip codes.
(3) As of May 1st 2006

Three themes emerged⁽²⁾

	Key themes / values	% Agree ⁽¹⁾
1	Building for the future	
	- “Buying as much of the land as possible, immediately”	97%
	- “Purchase as much ROW as possible, as quickly as possible”	84%
	- “Land to be used for sidewalks & road improvements should be purchased when available”	83%
2	Realizing economic benefits	
	- “Increasing number of jobs and businesses”	95%
	- “Increasing the tax base as quickly as possible”	60%
3	Maintaining geographic balance	
	- “Community consensus on where projects are located”	91%
	- “Balancing projects across quadrants”	75%

Community Priorities in the short-term⁽³⁾



(1) Top 2 boxes: Percent of respondents who rated the element as important or very important.

(2) Question: Please rate the values you consider most important in developing the BeltLine work plan for the first five years.

(3) Question: Please rank the importance of the following components of the BeltLine projects.

Source: BeltLine Community Engagement Survey, (March 25th – May 19th 2006)

Purpose

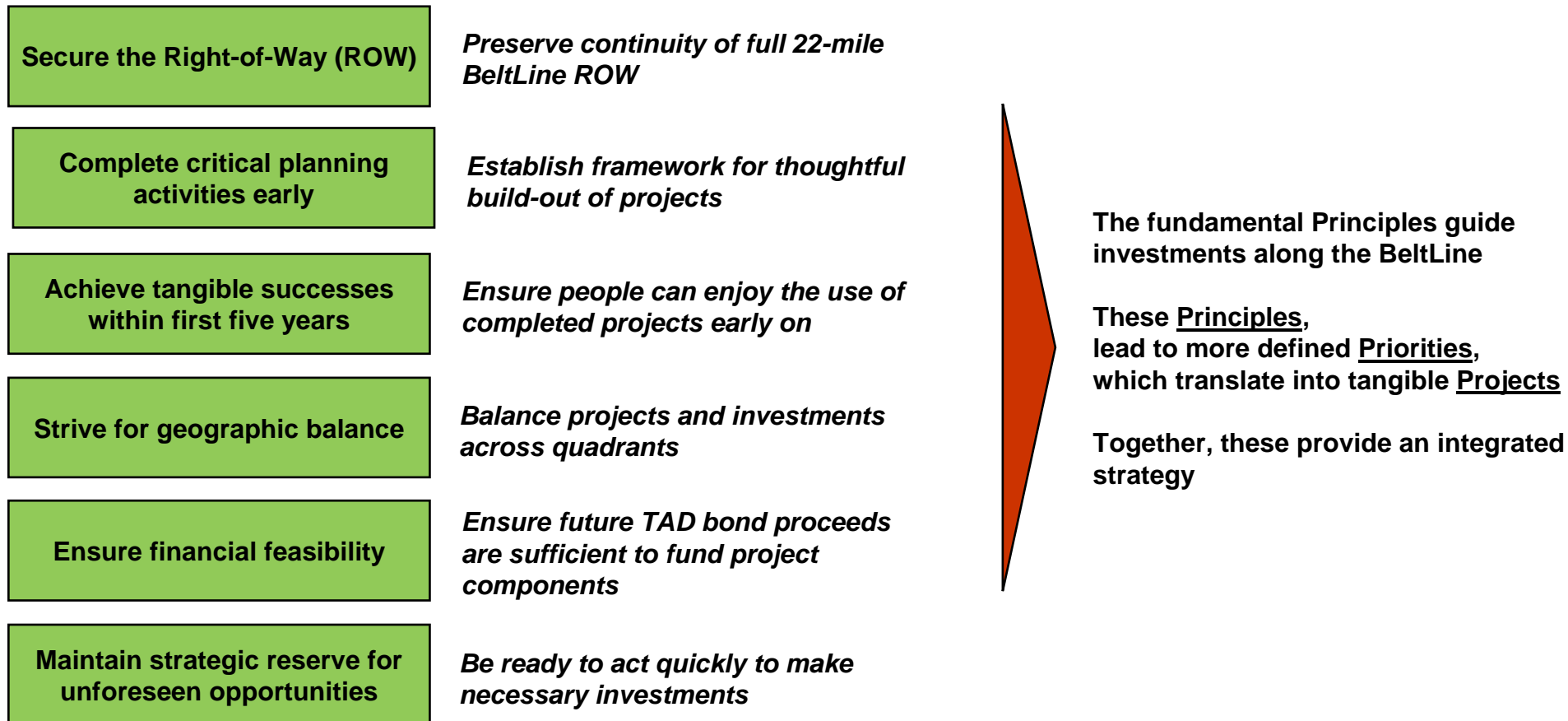
Context

“5-year Detailed Vision” and Work Plan

- Principles, priorities and projects
- Detailed work plans by element

Next Steps

Appendix



Each principle is critical to success

PRINCIPLES LEAD TO PRIORITIES FOR FIRST 5 YEARS

“Stakes in the Ground”



Growing greenspace with parks and trails



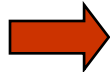
- Acquire and develop significant portions of Westside Park
- Fully develop 2-3 parks
- Complete at least two sections of trails and prepare three spur trails fully
- Dedicate remaining funds for new park and trail land across quadrants
- Maximize strategic reserves for unforeseen opportunities

Transforming transit



- Secure and develop as much Right-of-Way as possible
- Do everything possible to ensure transit at earliest opportunity
 - complete the MARTA Alternatives Analysis Study
 - complete Environmental Impact Statement and preliminary engineering work
 - complete Northwest alignment assessment
- Prepare Right-of-Way for trails and transit
- Pursue federal/state funding and establish contingency if funds not available
- Maximize strategic reserves for unknown opportunities

Ensuring livable communities and attractive business climate



- Complete basic planning studies (in first 18-24 months) related to street grid, connectivity, land-use, zoning, and master plans (Open Space, Transportation, Public art and 20 Sub-areas) to establish community-based framework for future economic development
- Invest in development incentives, affordable workforce housing, preservation (historic and environmental), public art and transportation improvement to drive economic development

The priorities reflect our fundamental principles and are critical to the integrated strategy

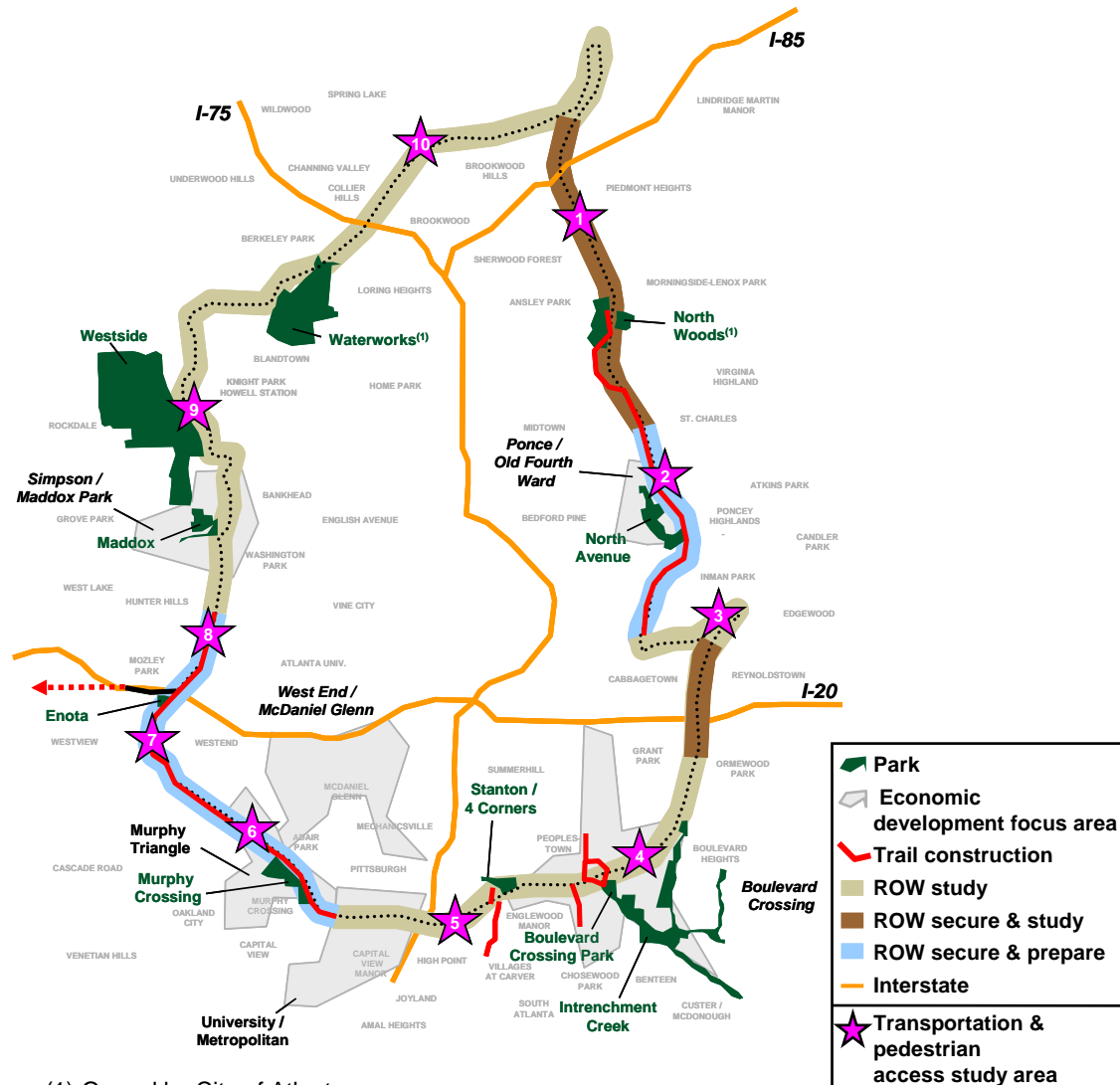
OVERVIEW OF PROJECTS IN THE 5-YEAR DETAILED VISION

ADA

Atlanta Development Authority

Projects in first five years

- 1 Growing greenspace with parks and trails
 - 585-625 acres of greenspace acquired with 260-300 acres developed
 - 480-490 acres of parks acquired with 155-165 acres developed
 - 5-7 miles / 90-100 acres of trails and 5-9 miles / 15-35 acres of spurs acquired and developed
- 2 Transforming transit
 - Complete all studies required to begin transit construction
 - Secure available Right-of-Way
 - Prepare 5-7 miles of Right-of-Way for transit
- 3 Ensuring livable communities and attractive business climate
 - ~\$42M invested in new affordable workforce housing units
 - Targeted economic development spending in 6 focus areas
 - Road and streetscape investment for transportation and pedestrian access study areas
 - Complete street grid, land-use plan, zoning, master planning and connectivity studies
 - Complete environmental and historic assessments
 - Incorporate public art



(1) Owned by City of Atlanta

Note: All park acres are shown, but only partial amounts may be acquired in first five years

DETAILED BUDGETARY WORK PLANS BY ELEMENT

1

Growing greenspace with parks and trails



Parks



Trails

2

Transforming transit



Transit

3

Ensuring livable communities and attractive business climate



**Planning and Economic
Development**



**Affordable
Workforce Housing**



**Transportation and
Pedestrian Access**

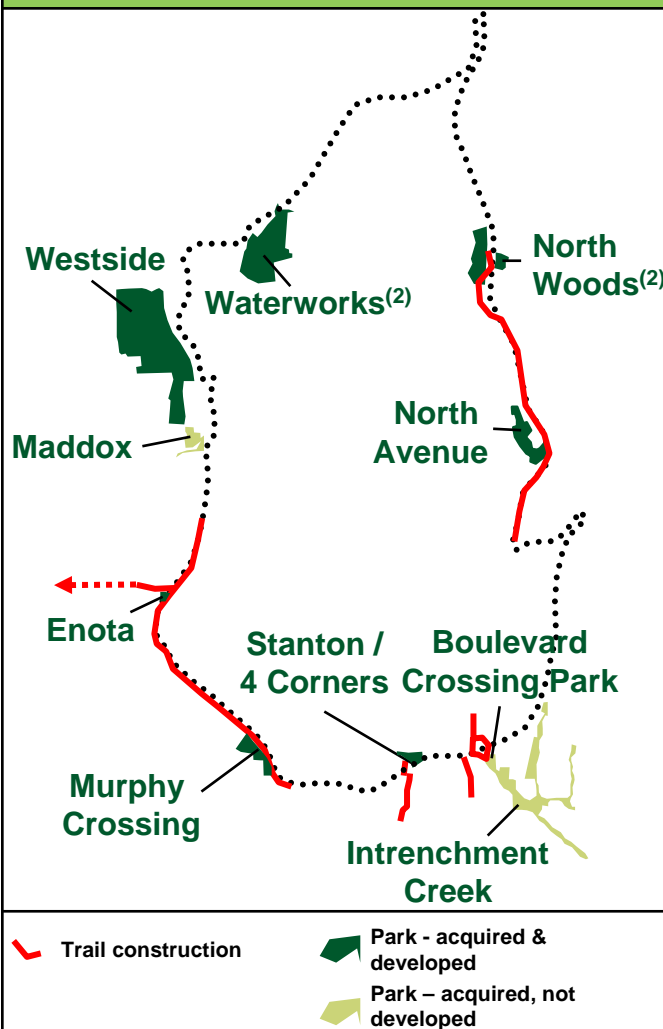
4

Finance

5

Organization

Parks and trails in 5 year budget



Parks and trails overview

Priorities:

- Acquire and develop areas with available Opportunity Bonds funds
- Assemble greenspace and greenways (45-48% of total 1,300 acres)
- Leverage opportunities for park development

Parks

Acquire 480-490 acres of land for 10 new parks⁽¹⁾ and develop 155-165 acres

- Complete development of 2 parks (Enota Park & Boulevard Crossing)
- Partial development of 4 additional parks (Westside; Murphy Crossing; Stanton / 4 Corners; North Woods- Piedmont Park expansion)

Invest \$1.7M in Public art for parks, trails and development areas

Trails

Secure and prepare 5-7 miles/ 90-100 acres of trails

- NE: 3-4 miles/ 47-52 acres connecting from Piedmont Ave. to Edgewood Ave.
- SW: 2-3 miles/ 43-48 acres connecting Allene Ave. to Lena St.
- NW: Conduct engineering study necessary for trail development

Contingent upon securing of Right-of-Way and completion of studies

Spurs

Secure & prepare 5-9 miles / 15-35 acres of spur trails out of total 11 miles in the Redevelopment Plan

- SE: 1-3 miles/ 5-10 acres of spurs connecting Grant Park to Chosewood Park and Stanton / 4 Corners to Pryor Street
- SW: 4-6 miles / 10-25 acres trail connecting Lionel Hampton Trail, Enota Park, and John A. White Park

Funding sources

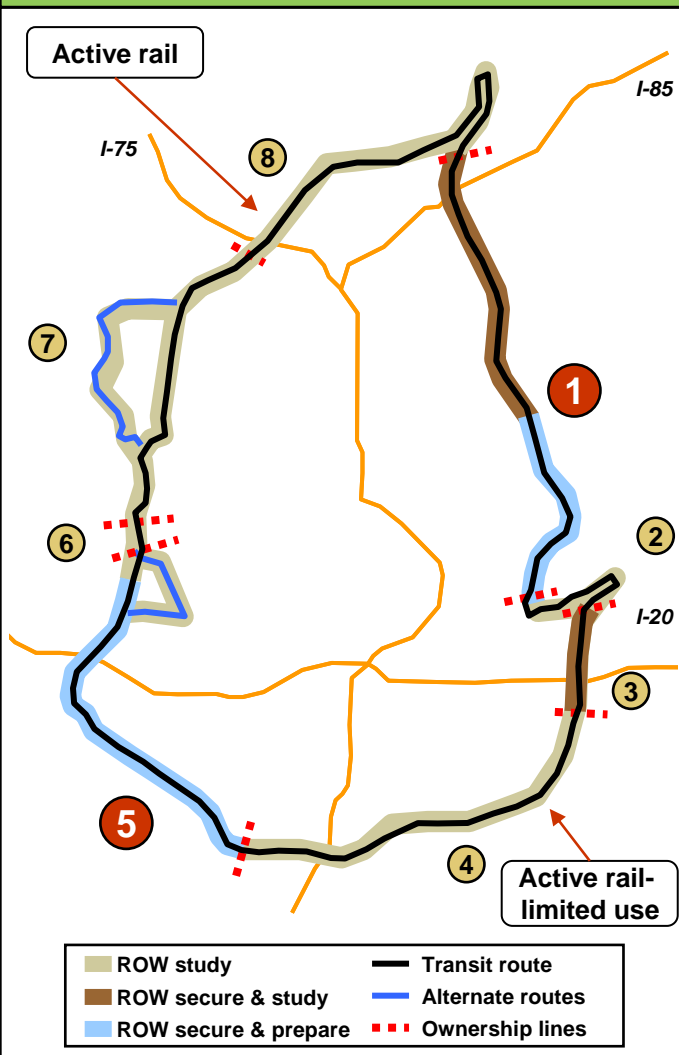
- Greenspace Opportunity Bonds
- Philanthropic and private funds
- Trust for Public Land's revolving credit line
- BeltLine TAD BAN / bonds; Federal funds

Budget:
\$ 180M

(1) 24 parks identified in Redevelopment Plan, 25 parks result of splitting Boulevard Crossing into 2 parks- Boulevard Crossing & Intrenchment Creek parks

(2) Acreage already owned by city: North Woods- all; Waterworks-110 acres

Right-of-Way (ROW) for transit



Transit overview

Priorities:

- Take all steps necessary to ensure the creation of a transit system
- Budget and prepare for the creation of a usable transit system as quickly as possible; finalize connectivity
- Proactively strive to secure as much of ROW as possible
- Acquire 35-37% of total 22-mile ROW

Right of Way (ROW)

Ownership and active rail
ROW currently owned by different parties with NW and SE in active use:

- ① NE Atlanta BeltLine Group
- ② ④ ⑧ CSX
- ③ ⑤ Georgia Dept. of Transportation
- ⑥ MARTA
- ⑦ Private/CSX

First five years ① ⑤

Since NW and SE in active use, focus will be to secure and prepare portion of NE and SW, but continue to explore opportunities in SE

Construction

Prepare for construction

Complete engineering, MARTA Alternatives Analysis, Draft Environmental Impact and final design studies to determine transit routes, stations, modes, costs and operating model

- Conduct commuter / freight studies as needed
- Investigate potential interim transit option

Construction

Start construction of trails and transit Right-of-Way

- e.g., demolition, earthwork, retaining walls, landscaping, etc.

Financing

Pursue creative financing strategies to:

- Augment TAD bond allocations for transit
- Expedite process for completion of first segment
- Create contingency pool using local funds

Funding sources

- Beltline TAD BAN / bonds
- Creative state, local, private funding
- Federal government's "New Starts" Program
- Transportation Improvement Program (TIP) funds
- Federal Transit Administration/ Federal Highway Administration programs

Budget:
\$78M⁽¹⁾

(1) Includes Right-of-Way acquisition, preparation and engineering; NW connectivity study
Note: Exact NW route to be determined

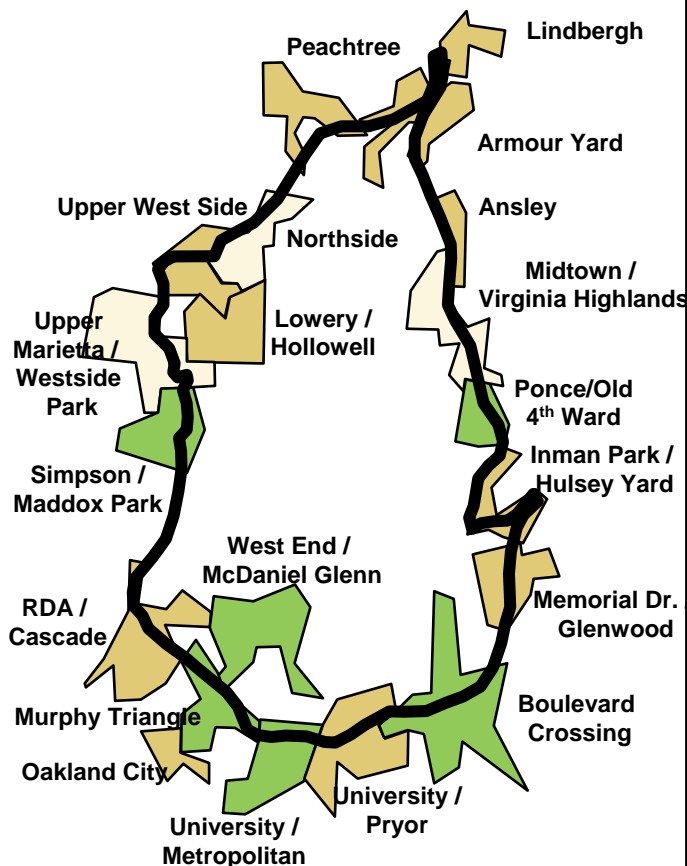
ENSURING LIVABLE COMMUNITIES & ATTRACTIVE BUSINESS CLIMATE (I)

Planning, Development and Workforce Housing

ADA

Atlanta Development Authority

Development Areas



- Focus: Seed with early public spending
- Manage: Respond opportunistically
- Leverage: Build on momentum of other projects

Development overview

Priorities:

- Seed private investment with targeted economic incentives fund
- Pursue city-wide workforce housing goals
- Preserve the historic aspects and improve the environmental quality of BeltLine neighborhoods

Planning

Basic planning activities:

- Land-use plan
- Master plan
- Zoning

Historic Preservation

- Support Atlanta Urban Design Commission designation efforts

Environment (\$8M)

- Conduct brownfield testing/remediation for key sites in target areas to facilitate private development

Economic Development

\$19M in incentives, ~75% targeting key focus areas⁽¹⁾:

- Murphy Triangle
- Boulevard Crossing
- Simpson/Maddox
- West End/McDaniel Glenn
- University/Metropolitan

Workforce Housing

\$42M from TAD issuance to be spread across the BeltLine

Creation of BeltLine Affordable Workforce Housing Advisory Group and BeltLine Trust Fund

Funding sources

- BeltLine TAD BAN / bonds
- Federal matches
- State and federal environmental clean-up program grants
- Other tax incentives, historic preservation tax credit

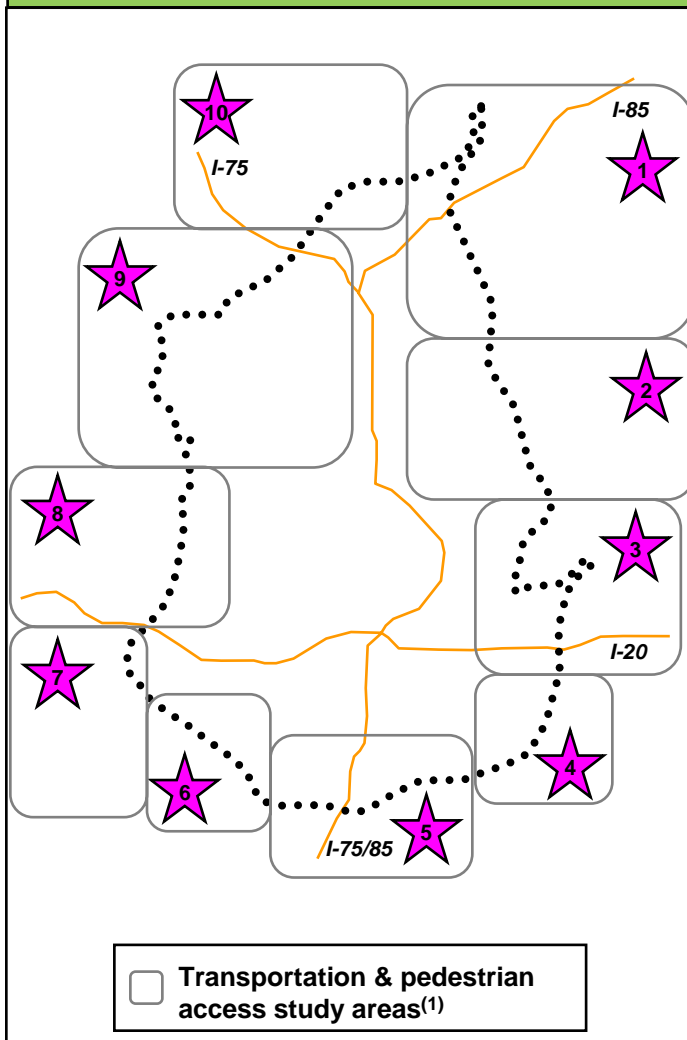
Budget:
\$69M

(1) Economic development spending in Ponce/Old Fourth Ward is limited to transportation infrastructure projects and no economic development incentives

ENSURING LIVABLE COMMUNITIES & ATTRACTIVE BUSINESS CLIMATE (II)

Transportation and Pedestrian Access Study Area

Key areas for studies / improvements



Transportation and pedestrian access study area overview

Priorities:	<ul style="list-style-type: none">• Oversee planning and execution of transportation and pedestrian/bike projects• Conduct studies for future design and engineering	
Planning	Existing projects	New projects
<p>Conduct 10 connectivity studies to:</p> <ul style="list-style-type: none">• Identify roadway and pedestrian/ bike projects to address this impact <p>Complete street grid and sub-area master plans</p> <p>Complete Transportation Master Plan</p> <p>Complete Parking Master Plan</p>	<p>Collaborate with City on implementation of approximately \$32M already approved/ funded projects:</p> <ul style="list-style-type: none">• In or near the BeltLine TAD• Of strategic importance to the BeltLine	<p>Allocate funds to new projects based on studies and community input</p> <p>Prioritize projects that:</p> <ul style="list-style-type: none">• Reduce traffic congestion• Improve pedestrian / bike access• Are of strategic importance for economic development and connectivity
Funding sources	<ul style="list-style-type: none">• BeltLine TAD BAN / bonds• Federal or private matches	
		Budget: \$23M

(1) Study areas determined from transportation studies of Redevelopment Plan

Northwest

\$152M⁽¹⁾

Focus on Westside Park while investigating trails and transit

- Invest significantly in new park acquisition and development
- Conduct studies necessary to resolve ROW barriers
- Spur economic development around Westside & Waterworks park
- Preserve local historic sites
- Drive affordable workforce housing/environmental remediation/public art
- Study transportation & pedestrian access areas

\$88M

Northeast

Develop trails and foundation for transit, while building on current momentum in the area

- Secure and prepare ROW for trail and transit
- Construct initial trail segment
- Support transit-oriented development at City Hall East with North Avenue Park
- Support expansion of North Woods
- Preserve local historic sites
- Drive affordable workforce housing/environmental remediation/public art
- Study transportation & pedestrian access areas

Southwest

\$99M

Develop trails, lay foundation for transit, and spark economic development

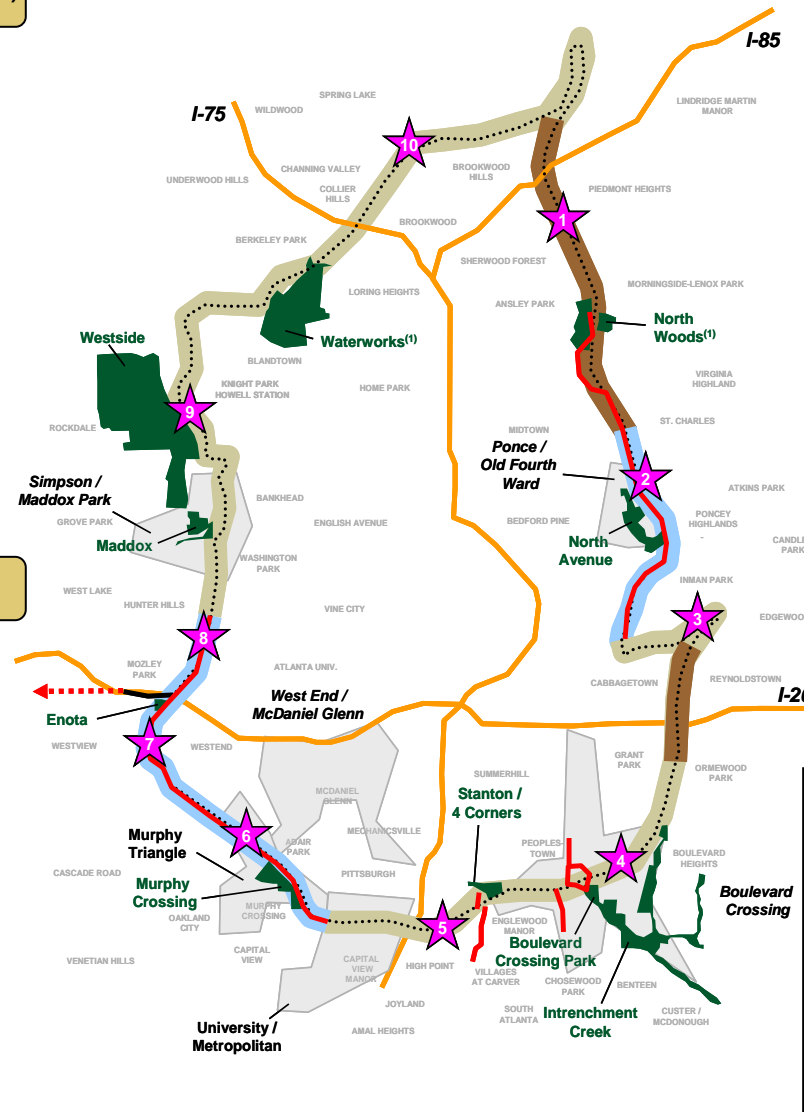
- Secure and prepare the ROW for trails & transit; construct initial trail
- Build spur connecting John A White park to BeltLine trail
- Expand new usable park land connected with spur trail
- Provide economic development incentives
- Preserve local historic sites
- Drive affordable workforce housing/environmental remediation/public art
- Study transportation & pedestrian access areas

\$88M

Southeast

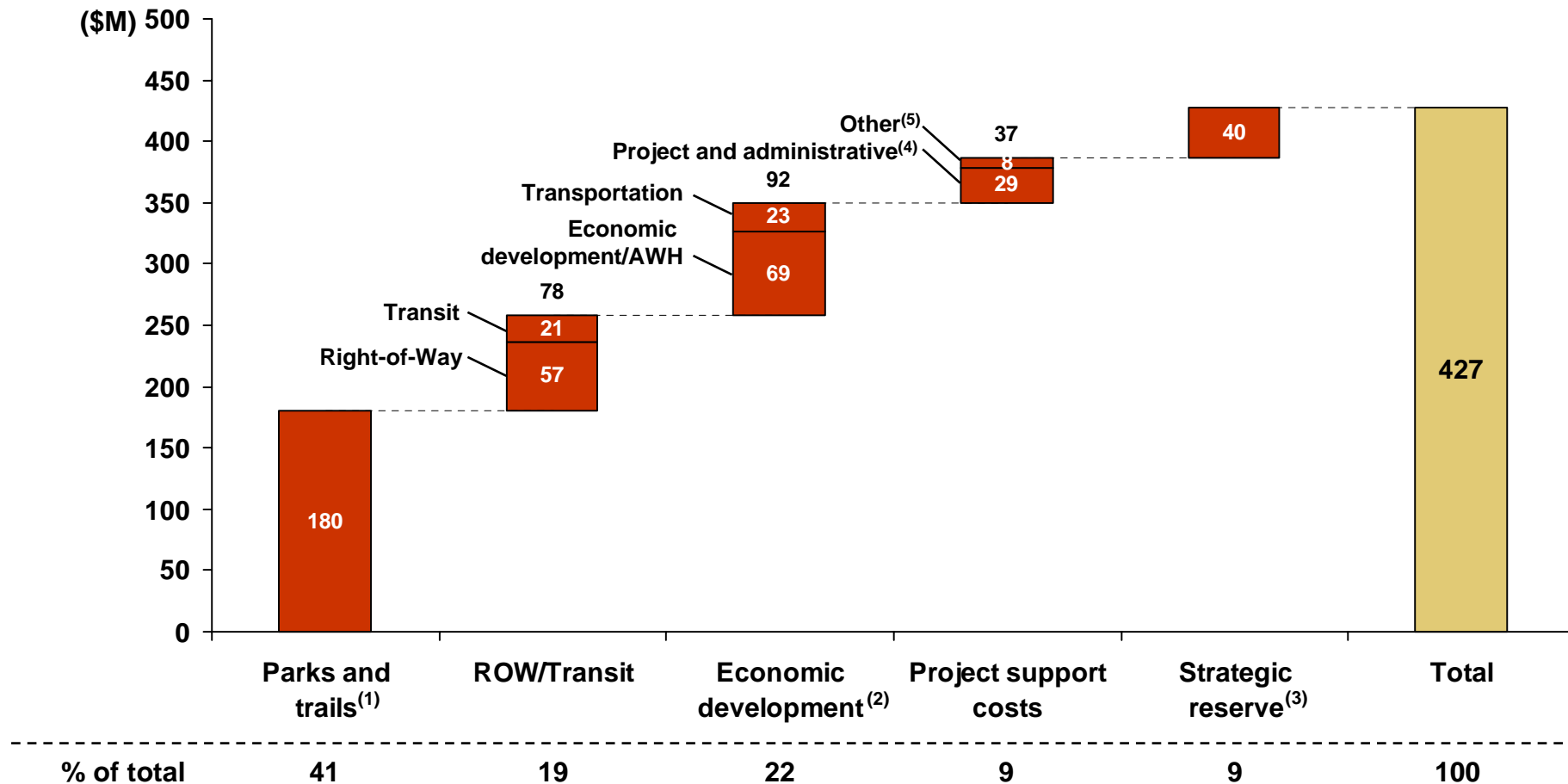
Jump-start private investment with park development and economic incentives

- Create new usable park land
- Connect existing and new parks with spur trails
- Encourage economic development with typical economic incentives
- Preserve local historic sites
- Drive affordable workforce housing/environmental remediation/public art
- Study transportation & pedestrian access areas



(1) \$97M of funding for Westside Park development

Estimated expenditure budget for BeltLine, 2006-2010



(1) Includes \$1.7M public art (2) Includes affordable workforce housing (AWH), transportation & pedestrian access and economic incentives plus other costs such as brownfield testing and connectivity studies

(3) \$40M strategic and tactical reserve (4) Administrative, project, and communications costs, 2006-2013 (5) Includes bond financing costs

Source: BeltLine Partnership / ADA

USES AND SOURCES OF FUNDS BY YEAR

ADA

Atlanta Development Authority

		(\$M)						Notes
Use / source		2006	2007	2008	2009	2010	Subtotal	
Uses	• Parks and Trails							180
	- Acquisition	40	20	22	21	16	119	• Quarry in process; earmarked Opportunity Bonds • Earmarked Opportunity Bonds & federal funds
	- Development	-	10	14	11	24	59	
	- Public art		-	1	1	-	2	
	• Right-Of-Way/Transit							78
	- Right-of-Way/ Transit acquisition, preparation, & engineering	1	27	20	9	21	78	• Earmarked federal funds and local match
	• Development							92
	- Workforce housing	2	7	8	8	17	42	• Requirement in legislation- geographic discretion
	- Development incentives	1	5	4	4	5	19	
	- Brownfield testing/ remediation	-	2	2	2	2	8	
	- Transportation & Pedestrian Access	1	2	2	5	13	23	
	• Project support costs							37
	- Administration, project, communication & finance	1	5	5	5	21 ⁽¹⁾	37	
	• Contingency							40
	- Strategic reserve	-	20	-	-	20	40	• Recommended for unforeseen opportunities
• Grand Total		46	98	78	66	139	427	427
Sources ⁽²⁾	• TAD BAN / bonds	140	-	25	-	115	280	
	• Philanthropic funding	28	20	9	-	-	57	
	• Opportunity Bonds	54	-	-	-	-	54	• Required spending on Parks / Trails
	• Dept. of Watershed Management	14	-	-	-	-	14	• Estimated for Quarry
	• Federal funding	3	7	4	4	4	22	• Funding for Right-of-Way, studies, trail development
	• Grand Total	239	27	38	4	119	427	427

(1) Includes \$2.3M contractual obligation reserve and administration/communication costs through 2013

(2) Revenue sources include \$0.2M Environmental Protection Agency grant and \$0.3M Quality of Life funding for park improvements

Source: Atlanta Development Authority / BeltLine Partnership estimates

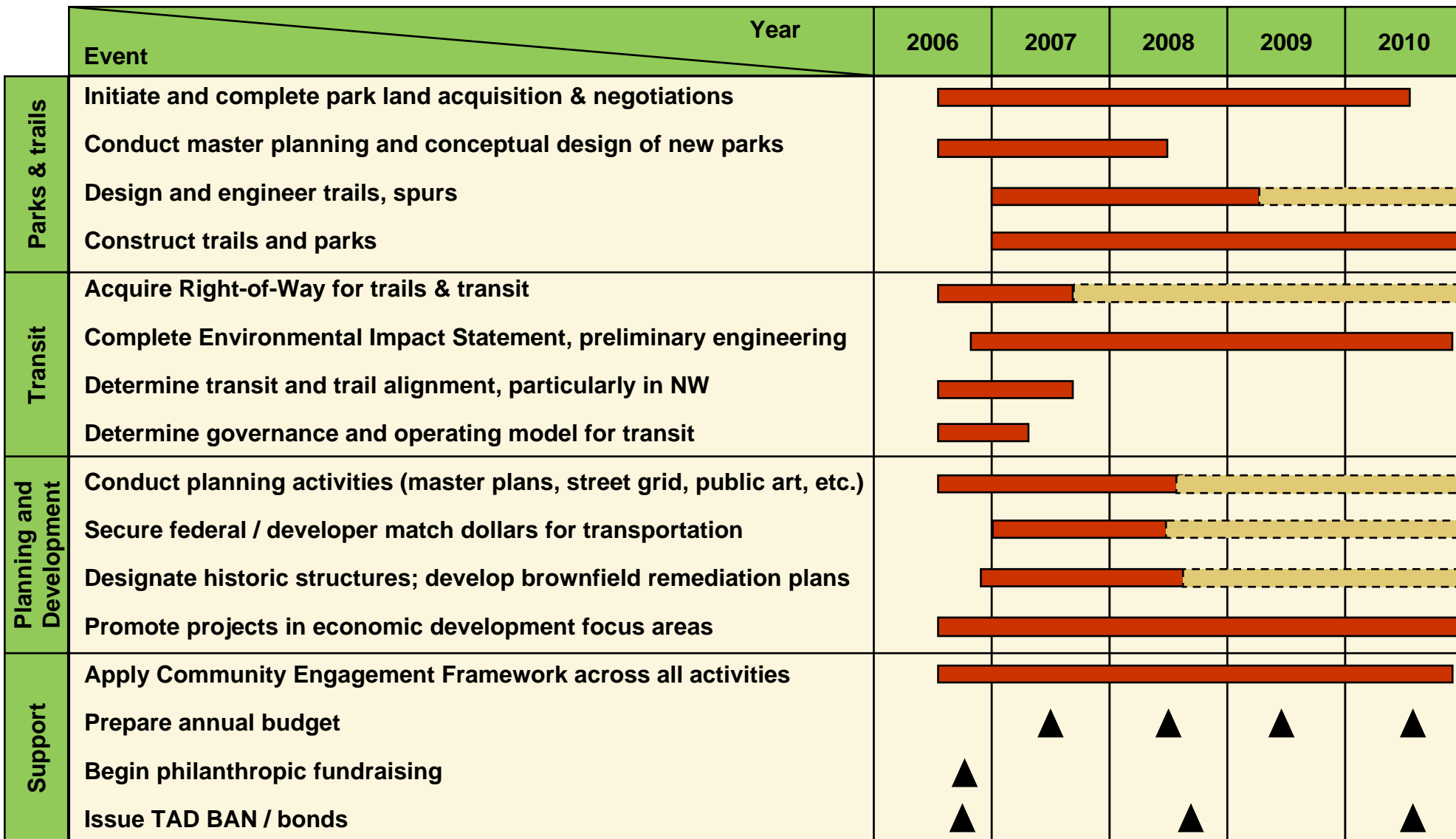
ADA
Atlanta Development Authority



ROLES AND RESPONSIBILITIES WITHIN BELTLINE FUNCTIONS

Core Function	Atlanta Development Authority	BeltLine, Inc	BeltLine Partnership	City departments
Strategy development planning	<ul style="list-style-type: none"> Represents TAD BAN / bonds interests to guide the strategy/planning process 	<ul style="list-style-type: none"> Defines strategy/plan for BeltLine 	<ul style="list-style-type: none"> Represents private interests to guide the strategy/planning process 	<ul style="list-style-type: none"> Supports the strategy/planning process
Fundraising	<ul style="list-style-type: none"> City agent for issuing TAD BAN / bonds 	<ul style="list-style-type: none"> Drives efforts to secure other federal, state, local and private funding 	<ul style="list-style-type: none"> Drives philanthropic funding in conjunction with Trust for Public Land and PATH Foundation Supports other private financing initiatives 	<ul style="list-style-type: none"> Assists with city bonds and other funding Issues bonds
Communication	<ul style="list-style-type: none"> Assists in official communications as needed 	<ul style="list-style-type: none"> Drives community engagement process Responsible for official communications Maintains BL community website 	<ul style="list-style-type: none"> Fosters advocacy and develops coordinated marketing communications Helps heighten awareness and educates community on the BeltLine 	<ul style="list-style-type: none"> Provides content Helps educate community on the BeltLine Conducts community input efforts related to specific activities (e.g., parks master planning)
Execution		<ul style="list-style-type: none"> Serves as project management office Drives execution of BeltLine plan Manages relationships/ contracts, etc. 	<ul style="list-style-type: none"> Supports BLI with volunteer efforts Coordinates private sector involvement and “special interest” constituencies 	<ul style="list-style-type: none"> Executes key elements of the BeltLine
Oversight	<ul style="list-style-type: none"> Represents TAD BAN / bonds interests to ensure funds are used as intended 	<ul style="list-style-type: none"> Tracks and reports progress to City Council/ Atlanta Public Schools/ Fulton County/ Atlanta Development Authority/ BeltLine Partnership 	<ul style="list-style-type: none"> “Steward:” ensures private funds are used as intended 	<ul style="list-style-type: none"> BeltLine Sub-Cabinet drives information-sharing and coordinates decision-making across departments

■ Primary work phase ■ Ongoing activities





Key challenges

- Ability to secure Right-of-Way

Actions to address near-term

- Initiate conversations with key owners and stakeholders of entire Right-of-Way
- Establish team to:
 - investigate alternative options for Right-of-Way
 - develop solutions for all parties involved

Contingency plans

- Be prepared to act quickly with contingency fund or other funds if special opportunity arises
- Investigate alternate routes

- Ability to purchase parcels around key parks

- Work to secure properties as soon as possible

- Pursue other parks if 10 parks in work plan are not available in short-term

- Ability to secure non-TAD funding sources (e.g., federal / state resources) in the first five years for the 25-year plan

- Develop federal funding strategy
- Explore all state funding options
- Outline innovative municipal financing opportunities
- Pursue philanthropic funds aggressively
- Pursue public/private funding opportunities

- Pursue alternative funding strategies

Purpose

Context

“5-year Detailed Vision” and Work Plan

Next Steps

Appendix

- **Finalize BeltLine Advisory Committee**
- **Hire CEO of BeltLine Inc.**
- **Create Trust Fund for Affordable Workforce Housing monies**
- **Establish BeltLine Affordable Workforce Housing Advisory Board, guidelines, and process**
- **Issue TAD bonds**
- **Build organizational infrastructure to support execution**
- **Review MARTA Alternatives Analysis results**
- **Initiate studies (e.g., master planning for 20 sub-areas, land-use, connectivity, Draft Environmental Impact Study, etc.)**
- **Amend City's Comprehensive Development Plan to lay groundwork for future BeltLine development**

Purpose

Context

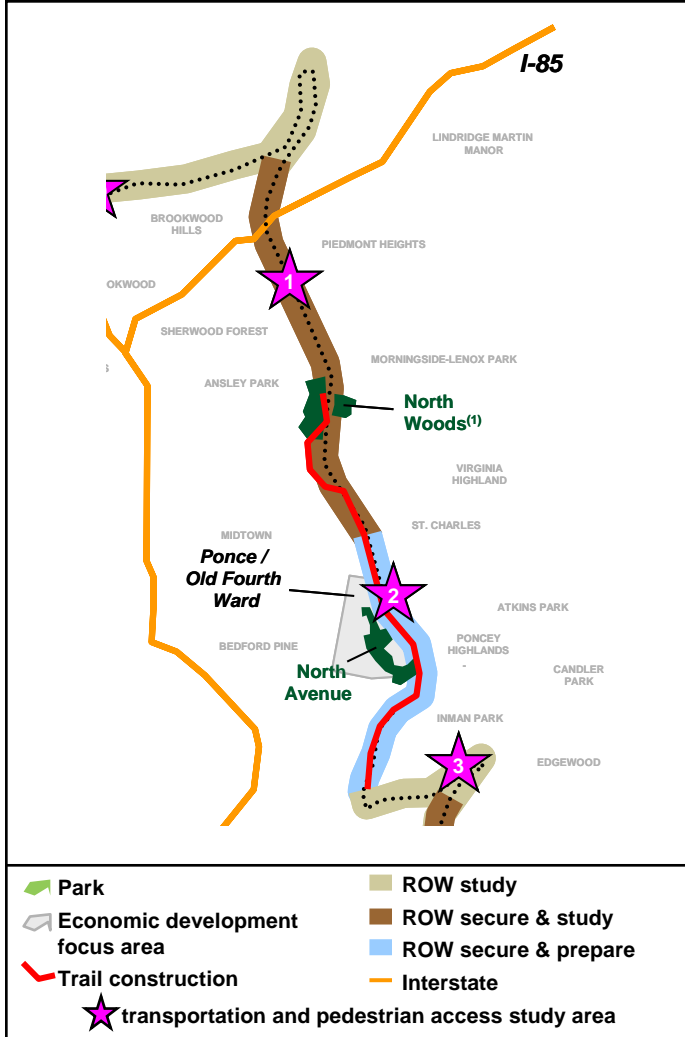
“5-year Detailed Vision” and Work Plan

Next Steps

Appendix

- **Quadrant view of the BeltLine**
- **Community Engagement and Communication Plan**

Northeast



Summary

Build on momentum of private market and current greenspace

- Expand on transit-oriented development at City Hall East with North Avenue Park and affordable workforce housing initiatives
- Study transportation and pedestrian access
- Develop trail from Piedmont Park/North Woods to Edgewood Avenue
- Build on expansion of North Woods
- Preserve local historic sites, drive affordable workforce housing, and brownfield remediation

Key facts

Parks and Trails

- Park acres acquired 60-62
- Park acres developed 8-10
- Trail miles / acres 3-4 / 47-52
- Spur miles / acres 0

Transit

- Miles studied or secured 6

Transportation and Pedestrian Access

- Study Areas (number of) 3

Development

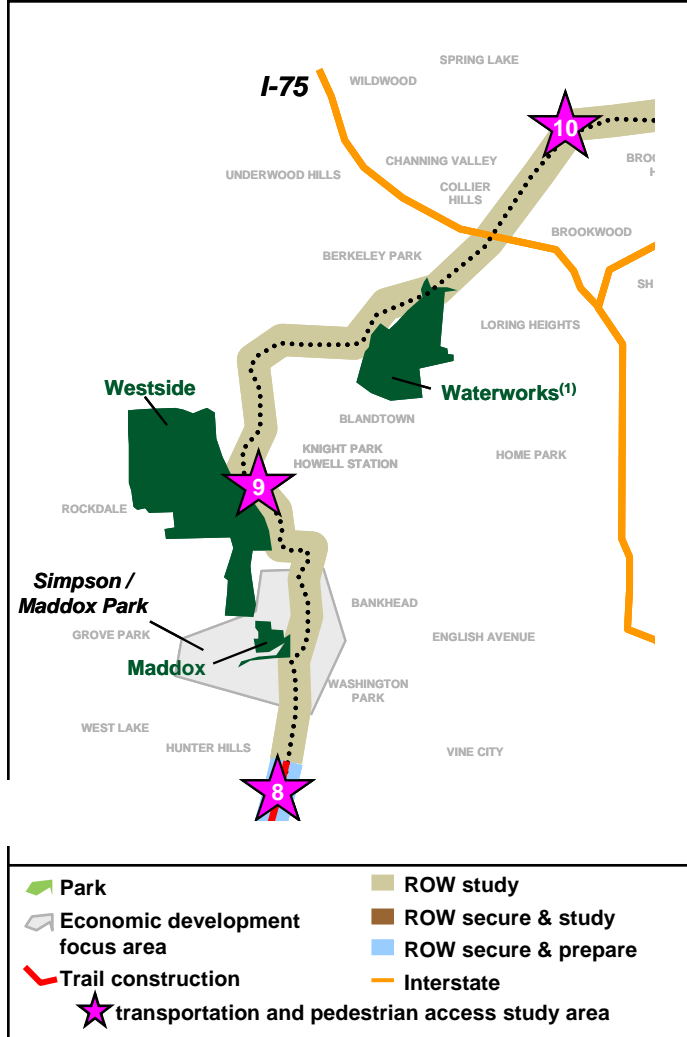
- Economic development focus areas 1
- Historic preservation candidates⁽²⁾ 10

(1) North Woods acreage already owned by City of Atlanta

(2) Current list of individually eligible candidates to the National Registry; discussion and evaluation by Atlanta Urban Design Commission staff

Source: Atlanta Urban Design Commission, study of BeltLine historic resources

Northwest



Summary

Build on success of Bellwood Quarry acquisition with development of Westside Park

- Invest in new Westside Park and Waterworks Park development
- Pursue opportunities for public/private facilities in Westside park
- Spur private development with economic incentives
- Preserve local historic sites, drive affordable workforce housing, and brownfield remediation

Current active rail segment and alignment pose structural barriers

- Conduct studies necessary to resolve alignment issues

Key facts

Parks and Trails

- | | |
|------------------------|---------|
| • Park acres acquired | 355-358 |
| • Park acres developed | 100-103 |
| • Trail miles / acres | 0 |
| • Spur miles / acres | 0 |

Transit

- | | |
|----------------------------|---|
| • Miles studied or secured | 7 |
|----------------------------|---|

Transportation and Pedestrian Access

- | | |
|---------------------------|---|
| • Study areas (number of) | 3 |
|---------------------------|---|

Development

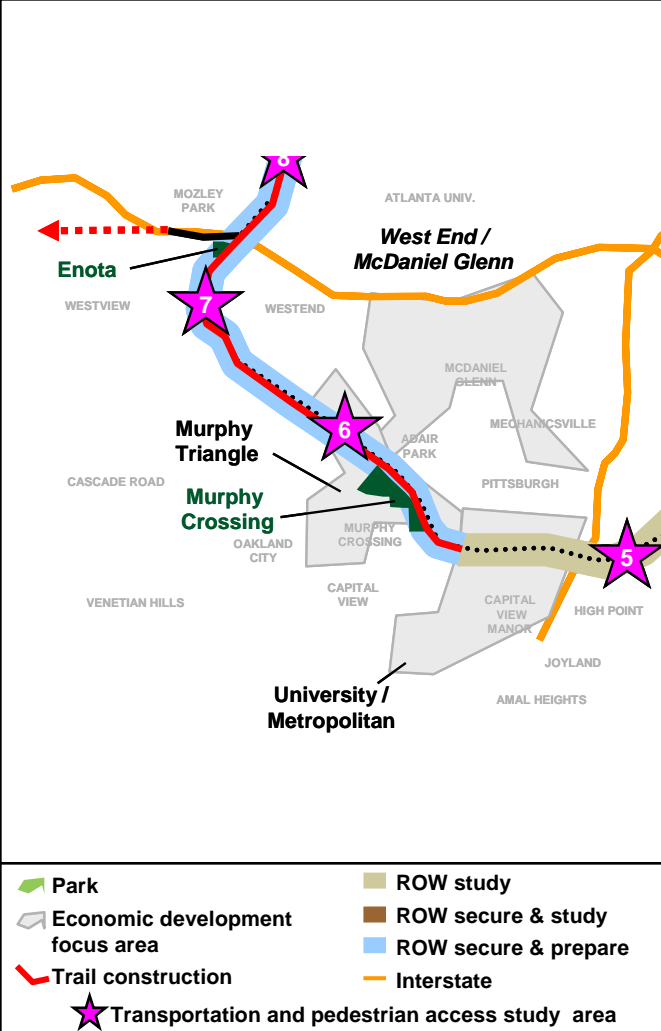
- | | |
|---|----|
| • Economic development focus areas | 1 |
| • Historic preservation candidates ⁽²⁾ | 27 |

(1) Waterworks- 110 acres owned by City of Atlanta

(2) Current list of individually eligible candidates to the National Registry; discussion and evaluation by Atlanta Urban Design Commission staff

Source: Atlanta Urban Design Commission, study of BeltLine historic resources

Southwest



Summary

Spur economic development and prepare for transit while developing new parks and trails

- Secure and prepare the Right-of-Way for trails and transit
- Create new usable park (Enota)
- Develop trail segment from Allene Avenue to Lena Street and spur trail connecting to John A. White Park
- Encourage economic development with infrastructure projects and economic incentives; drive environmental clean-up
- Preserve local historic sites, drive affordable workforce housing, and brownfield remediation

Key facts

Parks and Trails

- Park acres acquired 15-17
- Park acres developed 15-17
- Trail miles / acres 2-3 / 43-48
- Spur miles / acres 4-6 / 10-25

Transit

- Miles studied or secured 4

Transportation and Pedestrian Access

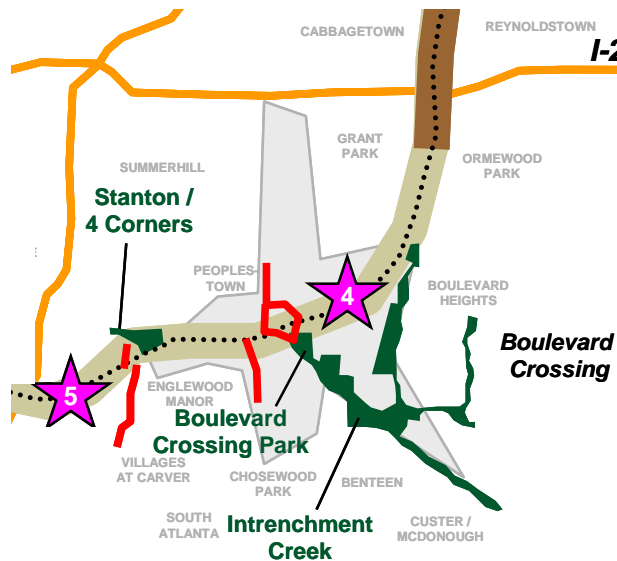
- Study areas (number of) 2

Development

- Economic development focus areas 3
- Historic preservation candidates⁽¹⁾ 8

(1) Current list of individually eligible candidates to the National Registry; discussion and evaluation by Atlanta Urban Design Commission staff
Source: Atlanta Urban Design Commission, study of BeltLine historic resources

Southeast



- Park
- Economic development focus area
- Trail construction
- ★ Transportation and pedestrian access study area
- ROW study
- ROW secure & study
- ROW secure & prepare
- Interstate

Summary

Leverage Opportunity Bonds to expand greenspace, connect neighborhoods with spur trails and attract private investment with economic incentives

- Create new usable park land
- Connect existing parks to BeltLine and other parks with spur trails (Grant Park to Chosewood Park and Stanton / 4 Corners to Pryor Street)
- Preserve local historic sites, create affordable workforce housing & drive environmental clean-up
- Promote economic development in focus area

Key facts

Parks and Trails

- Park acres acquired 50-53
- Park acres developed 32-35
- Trail miles / acres 0
- Spur miles / acres 1-3 / 5-10

Transit

- Miles studied or secured 5

Transportation and Pedestrian Access

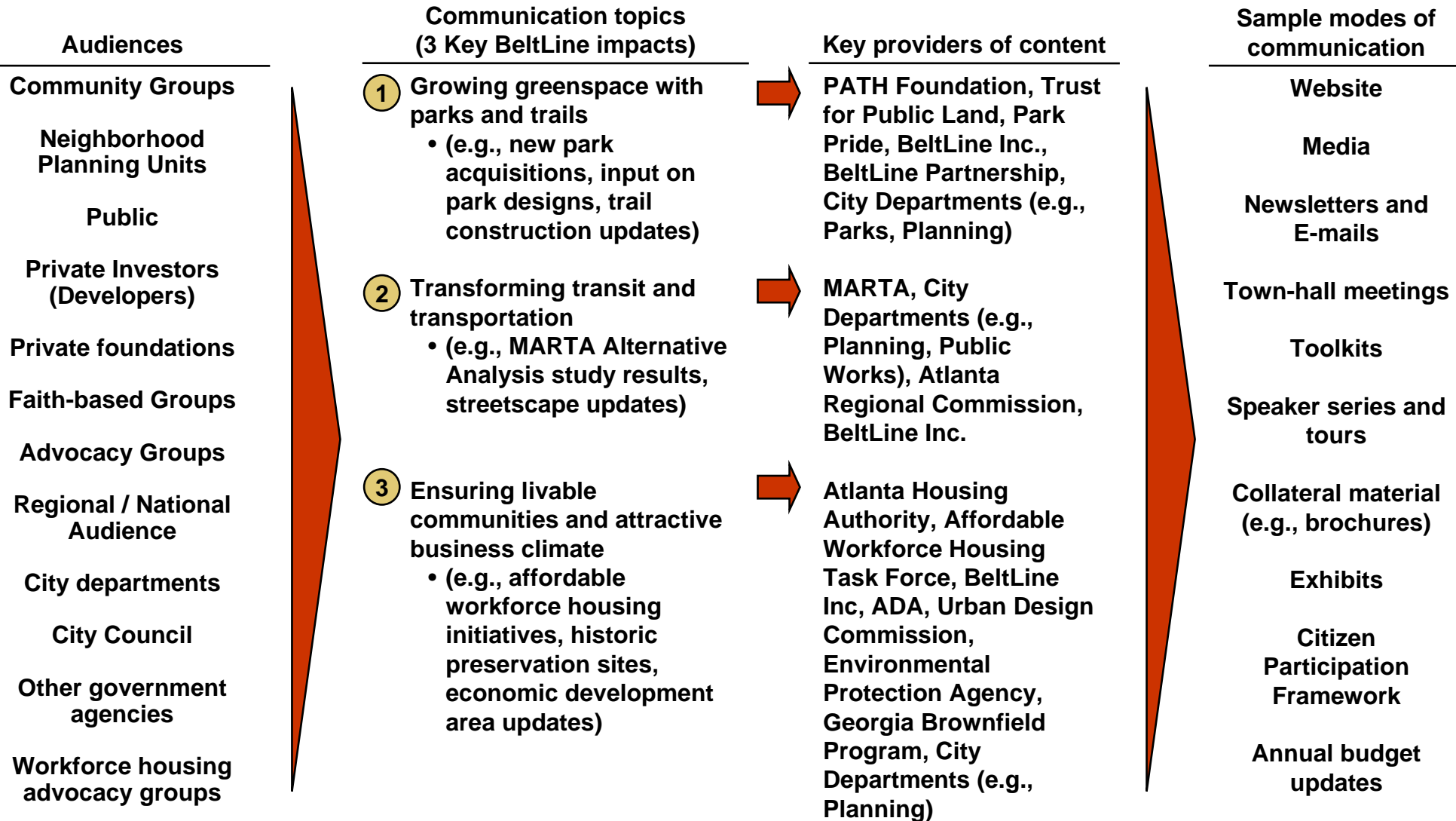
- Study areas (number of) 2

Development

- Economic development focus areas 1
- Historic preservation candidates⁽¹⁾ 6

(1) Current list of individually eligible candidates to the National Registry; discussion and evaluation by Atlanta Urban Design Commission staff
Source: Atlanta Urban Design Commission, study of BeltLine historic resources

COMMUNICATION OF WORK PLAN PROGRESS AIMS TO REACH MULTIPLE AUDIENCES



Coordinated and driven by BeltLine Inc. and advocated by BeltLine Partnership

Appendix C: 2008 Budget Allocation for Affordable Housing Programs

Posted online at www.beltline.org.

BELTLINE AFFORDABLE HOUSING TRUST FUND				
PROGRAM COMPONENT	TRUST FUND POLICIES	10/6 BUDGET	10/28 BUDGET	
1 Multifamily Rental Developer Incentives	Grants to developers of rental housing enforced by a Land Use Restriction agreement > 60% of area median income ("AMI") eligibility cap for affordable units funded by Trust Fund > A minimum of 15% of all units in each development must be affordable > Require a minimum 15 year affordability period	\$4,643,921	\$2,868,659	
2 Single Family Developer Incentives	The Trust Fund will allocate subsidies to developers that commit to building affordable for sale units. > The subsidy will be passed on to eligible homebuyers in the form of a deferred second mortgage. > 100% of AMI eligibility cap for one or two person households; 115% of AMI cap for three or more persons > A minimum of 15% of all units in each development must be affordable > 2nd mortgage forgiven after 15 yrs; principal + share of gain due during years 1-9; prin. only yrs 10-15 > HUD 203(B) purchase price limit	\$1,600,000	\$ 968,358	
3 Community Housing Development Organization ("CHDO") Set Aside: Multifamily Rental	Grants to CHDOs enforced by a Land Use Restriction Agreement > 60% of AMI eligibility cap for affordable units funded by Trust Fund > A minimum of 15% of all units in each development must be affordable > Require a minimum 15 year affordability period	\$1,342,990	\$ 829,596	
4 Community Housing Development Organization ("CHDO") Set Aside: Single Family Homeownership	The Trust Fund will allocate subsidies to CHDOs that commit to building affordable for sale units. > The subsidy will be passed on to eligible homebuyers in the form of a deferred second mortgage > 100% of AMI eligibility cap for one or two person households; 115% of AMI cap for three or more persons > A minimum of 15% of all units in each development must be affordable > 2nd mortgage forgiven after 15 yrs; principal + share of gain due during years 1-9; prin. only yrs 10-15 > HUD 203(B) purchase price limit	\$1,342,990	\$ 829,596	
5 Downpayment Assistance	Assistance will be provided in the form of a deferred second mortgage loan. > 0% interest > 100% of AMI eligibility cap for one or two person households; 115% of AMI cap for three or more persons > 2nd mortgage forgiven after 15 yrs; principal + share of gain due during years 1-9; prin. only yrs 10-15 > Best efforts will be made for six months to target households between 60 - 80% of AMI > Provide exclusive marketing to City of Atlanta, Fulton County, Atlanta Public School employees and BeltLine neighborhood residents for first three months of the program. > HUD 203(B) purchase price limit	\$2,500,000	\$1,544,308	
6 Property Acquisition Rental Affordable Housing	Funds available for property acquisition for rental affordable housing development within the Beltline TAD. Developers will execute a Land Use Restriction Agreement which outlines affordability restrictions.	\$1,000,000	\$ 617,723	
7 Property Acquisition Owner-Occupied Housing	Funds available for property acquisition for single family affordable housing development. Developers to execute a Development Agreement and will transfer this grant to homebuyers in the form of a deferred second mortgage.	\$1,000,000	\$ 617,723	
SUBTOTAL		\$13,429,901	\$8,295,965	
Program Administration	Funds Trust Fund Program Administration for three years	\$ 900,000	\$ 555,951	
TOTAL		\$14,329,901	\$8,851,916	

OTHER GENERAL POLICIES:

- > 20% of Trust Fund Program dollars will be reserved for CHDO's.
- > Program funds not expended within 12 months may be reallocated to other components to insure that 100% of bonds proceeds meet spend down requirements.
- > Approved projects must balance cost and quality; meet or exceed local building standards; be comparable in size and quality to similar market rate units within the same development; be mixed income; and contain units affordable to the City's lower income citizens.
- > Developments must meet "Barrier Free" requirements as defined by City of Atlanta ordinance.
- > Developments must have environmentally sustainable components.

10/28/08

Appendix D: List of Reference Documents

1999 – 2005 Project Initiation

Atlanta Emerald Necklace Study (Garvin Associates for Trust for Public Land, 2005)

Atlanta BeltLine Redevelopment Plan (EDAW et al, 2005)

BeltLine Partnership Briefing on Redevelopment Plan (2005)

Atlanta BeltLine Tax Allocation District Feasibility Study (2005)

City of Atlanta Economic Development Plan 2005 Results

City of Atlanta Ordinance 05-0-1733

City of Atlanta Resolution 0-6R-1577

2006 – 2011 Progress Reports

Atlanta BeltLine Project Plan of Work for 2006-2010 Budget (ABI, July 2006)

5 Year Workplan Status Update (ABI, November 2008)

Change in TAD & Other Funding Sources for 2009 & 2010 (ABI, 2008)

BeltLine Development Map (ABI, 2009)

BeltLine Tax Allocation District Fund Financial Statements (Mauldin & Jenkins, 2010)

Atlanta BeltLine Annual Report 2010 (ABI, 2011)

Atlanta BeltLine Partnership Moving Forward (referred to as ABP Annual Report, undated)

Atlanta BeltLine Transit Briefing (ABI, 2-17-11)

“Reflecting Back, Moving Forward” Presentation (ABI, 9-13-2011)

Internal ABI 5 Year Progress Calculations 2011 (ABI, 2011)

BeltLine Tax Allocation District Advisory Committee Annual Briefing (TADAC, April 2011)

Affordable Housing

The Atlanta Beltline Transit Feasibility White Paper (Beltline Transit Panel, 2005)

Initiatives to Mitigate Economic Displacement around the BeltLine (BeltLine Partnership in Collaboration with Community Partners, 2007)

Affordable Housing and the BeltLine: A Community Conversation (ABI, 2008)

BeltLine Equitable Development Plan (no author shown, draft, 2009)
“Property Acquisition for Affordable Housing Strategy” Presentation (ABI, 2010)
Atlanta Housing Element of the 2010 Comprehensive Plan (City of Atlanta, 2010)
2011 Housing Trust Fund Application (ABI website, 2011)
Atlanta Land Trust Collaborative Fact Sheet (ABI website, 2011)
Brochure of Selected Activity Centers on the BeltLine (ABI, undated)
Phoenix House Staff Report (ADA, 2011)
Reynoldstown Senior Apartments Staff Report (ADA, 2011)

City of Atlanta

Capital Improvements Program (CIP) and Short-Term Work Plan (City of Atlanta, 2010)
City of Atlanta Budget FY 2011-2012 (City of Atlanta, 2011)

Best Practices Materials

Presidio Trust Strategic Plan 2005-2009 (Presidio Trust, 2005)
P3 Guidelines from GDOT (Georgia Department of Transportation, 2010)
Effective Use of Advisory Committees (Transportation Research Board, 2010)
2011 Hudson River Park Trust Annual Financing Plan (HRPT, 2011)
Atlanta Regional Commission 2040 Plan Implementation Program (ARC, 2011)

Appendix E: Materials for Best Practices



SOUTH OF MARKET PROJECT AREA COMMITTEE

1035 FOLSOM STREET SAN FRANCISCO, CA 94103
415.487.2166 Fax 415. 487.2169 website: <http://www.sompac.com>
Advisory body to the San Francisco Redevelopment Agency

EXECUTIVE COMMITTEE

Monday August 8, 2011

12:00 noon

STANDING ITEMS (Action 10 min):

1. Roll Call
2. Chair's Report
3. Approval of Minutes
4. Approval of Agenda
5. Announcement of September 12, 2011 Meeting

Chair
Antoinetta Stadlman
SRO Residential Tenant/

Vice Chair
Charles Range
CBO: SF Medical
Outreach Program/

Parliamentarian
Economics Chair
Henry Karnilowicz
Business Owner/Service

Housing Chair
Raymon Smith
CBO: Senior Action Network/

HSHS Chair
Henry Belton
SRO Residential Tenant/

STAFF/OFFICE MATTERS (Action):

6. Secretary/Treasurer's Report by Marcia Ban (5 min)
7. Staff Activities Report by Marcia Ban (5 min)

PAC MATTERS (Action):

8. Vacancies/Bad Standing/Applications by Marcia Ban (5 min)
9. Redevelopment Reports by Mike Grisso (10 min)
10. Subcommittee Reports by Subcommittee Chairs (5 min)
11. PAC Agenda by Antoinetta Stadlman (5 min)
12. PAC Packet by Antoinetta Stadlman (5 min)
13. Committee Member Announcements (5 min)

PUBLIC COMMENT

Comments on the above agenda items may be made before the Executive Committee members discuss the agenda item. Comments on non-agenda items can be made at this time, but must be limited to three minutes per speaker.

MEETING ENDS

Antoinetta Stadlman
Chair



SOUTH OF MARKET PROJECT AREA COMMITTEE

1035 FOLSOM STREET • SAN FRANCISCO, CA • 94103

415.487.2166 Fax 415. 487.2169 • website: <http://www.sompac.com>

Advisory body to the San Francisco Redevelopment Agency

GENERAL PAC Monday February 28, 2011 6:00 PM

Presiding Chair (6:08 PM)

Antoinetta Stadlman

Determination of Quorum (6:08 PM)

Present: Steve Barton, William Curry III (17:10), Artena Dickerson/SF Clean City Coalition (17:12), Christine Ericksen (16:18 PM), Nan Connell-Henson, Elaine Jones, Henry Karnilowicz, Allan Manalo/Bindlestiff Studios, Nasir Patel, Charles Range/SOM Health Center, Raymon Smith (17:13), Antoinetta Stadlman and Mark Swenson (16:31)

Absent: Ingrid Aquino, John Elberling, Jasen Idefonzo/Bessie Carmichael Parent, Don Marcos/SOM Employment Center, Paul Mobbs and Marie Romero

Staff: Marcia Ban

Agency: Mike Grisso and Courtney Pash

Guests: Andrew Bryant/MJM Management and Henry Belton

Chair's Report (6:08 PM)

Ms. Stadlman announced that she had nothing to report at this time.

Approval of minutes (6:08 PM)

Motion: *"To approve the minutes of the January 2011 General PAC meeting as is."*

Vote: **Yes: 11** **No: 0** **Abstain: 0** **Motion Passes**

Agenda Order (6:08 PM)

1,2,3,4,5,6,7,8,9

Motion: *"To approve the agenda order as is."*

Vote: **Yes: 11** **No: 0** **Abstain: 0** **Motion Passes**

Announcement of next General PAC meeting

Ms. Stadlman announced that the next General PAC meeting would be Monday April 18th, 2011 at 6:00 PM.

Agenda Item 6. Redevelopment Agency Report by Mike Grisso (6:09 PM)

a. Housing Developments

b. Other Developments

Ms. Grisso provided an update regarding the governor's budget proposal. Things are not looking good; in fact they look worse. The Budget Committee of the Senate wants to eliminate redevelopment agencies in their budget proposal. The Assembly does not eliminate redevelopment in their budget proposal, but they are asking for approximately \$1.7 billion from the state redevelopment agencies. Now the Senate and the Assembly will meet to discuss various options. Several California mayors have called for pass throughs; the State would have to issue bonds, which requires a constitutional amendment. The redevelopment agency may not be around come July, 1 2011. The South of Market Project would be over except for projects already in the pipeline. It is not looking good with the \$27 billion deficit. Redevelopment agencies are on the chopping block and there will be many media stories regarding this in the coming months. Redevelopment will probably not continue as it currently is.

Mr. Range wanted to know about the Bayview Hunters Point Project. **Mr. Grisso** stated that the Hunter's Point Shipyard would probably be continued, but the Bayview would be eliminated. Transbay and Mission Bay would continue with their projects. **Mr. Range** asked about project sites being developed that have debt obligations. **Mr. Grisso** stated that the Agency owns the right to the land (ground leases). The Agency would have to sell the land and all assets if they were no longer in existence. **Mr. Range** inquired if the Agency would be able to transfer all assets to The City. **Mr. Grisso** explained that it is possible, but the current legislation states that the Agency would have to sell all of their assets-this is all very speculative at this point.

Mr. Smith wanted to know if the Agency owned the 474 and Hugo sites and whether the alleyway work was complete. **Mr. Grisso** stated that the Agency does own the 474 and Hugo sites and that the alleyway work for Phase I is now complete; only the lighting has to be installed by the PUC, which should be done within three months. **Mr. Smith** wanted to know about some of the missing plants in the alleyway project. **Mr. Grisso** explained that some of the plants were not planted due to utilities. **Mr. Smith** inquired about the savings from Phase I. **Mr. Grisso** stated that they would be able to provide that information at a later date. **Mr. Smith** wanted to know when the Agency would require the PAC's advice on Phase II. **Mr. Grisso** announced that they would like to get Phase II going as soon as possible and that DPW would be taking the lead on that. The \$1.4 million grant for Phase II must be used for the alleyways and we should begin the design phase very soon.

Mr. Karnilowicz inquired whether or not the Hugo property was entitled by planning; have the permits already been pulled for the building and if so, the building could be sold to another party for more money if it is already entitled. **Mr. Grisso** stated that the Agency is not gone yet, but that it is possible that 474 and the Hugo site may have to be sold or put up for auction at some point. **Mr. Karnilowicz** wanted to know if the Hugo was entitled. **Mr. Grisso** stated that the affordable housing is being designed now and he doesn't know if that would help the building sell any faster. The design team is still working on the plans and he is not sure if they can get it to planning before July 1, 2011.

Ms. Jones wants to try and complete these projects and would like to know what she can do to facilitate this. Too much money has been spent trying to get these projects completed and this is ridiculous and she is not willing to give up on this community. **Mr. Grisso** explained that she should contact her State Assembly person. **Ms. Stadlman** stated that selling off real estate assets is not a good idea with the real estate market

where it is now. **Mr. Manalo** wanted to know what the next action or decision would be. **Mr. Grisso** explained that the Assembly and the Senate will adopt a budget by mid-March (very ambitious), but the budget needs voter approval due to the taxes being held over. The Democrats are supporting the Governor's budget proposal.

There was a ribbon cutting ceremony for Tutubi Plaza that was well attended and a nice event. The design work on Phase II of the alleyway project is proceeding and the community meetings should be held soon. **Mr. Grisso** and **Ms. Pash** met with the SFPD Chief and he said that the substation on 6th Street is not going to happen at this time. Supervisor Kim is advocating for the substation. The Agency, SFPD and Supervisor Kim will meet one more time to discuss the substation. The official word from the SFPD to the Agency is that this is not going to happen, but the foot patrols will be increased. **Mr. Barton** stated that Supervisor Kim called him this morning and was very positive that this was happening. Everyone wants the substation and he is grateful that Supervisor Kim is enthusiastic about it. **Mr. Range** reminded everyone that he who has the power directs the outcome. He stated that he had seen the article about the SFPD potentially putting a substation in Westfield Mall. **Mr. Smith** explained that there were two options mentioned in the article for Westfield Mall: one being the substation. **Ms. Connell-Henson** echoed **Mr. Range's** disappointment. **Mr. Karnilowicz** echoed the sentiment as well and announced that he thinks it is crazy that a substation could possibly be put in Westfield Mall when it is critical for 6th Street. He feels confident with Supervisor Kim on board. **Ms. Jones** stated that she is all for it. **Mr. Barton** explained that there is not enough parking on 6th Street for the police cars, but Westfield Mall has even less parking available.

Mr. Grisso explained that the article came out one day after they had met with the SFPD Chief. There would only be a couple of officers assigned to Westfield, not a full staff like the substation. There is not enough staffing for the substation and the issue of parking came up at the meeting. The Agency is trying to facilitate more parking for the substation. It is best to call the police when you see something happening so that there is a record of offenses in the direct area. **Mr. Grisso** wanted to thank **Mr. Barton**, **Mr. Karnilowicz** and the 6th Street merchants for their advocacy on this matter. **Mr. Bryant** stated that he has spoken with Captain Orkes and the SFPD is now using Compstat, so it is imperative that people call in to report crimes so that there is a record of it.

Agenda Item 7. Hugo Hotel Recommendations by Raymon Smith (6:44 PM)

Mr. Smith announced that due to a procedural problem this item is back before us tonight. **Mr. Smith** stated that **Mr. Grisso** confirmed at the Housing Subcommittee that he would not advocate for a non-smoking building. Every six seconds one person will die due to a smoking related illness. Usually it is the economically deprived and disadvantaged people. We have a chance to rewrite history and **Mr. Smith** would urge everyone to consider this when voting on this item. Westfield Plaza on 7th Street, built with Agency money, is a no-smoking development. Smokers who live in the building go outside to smoke.

Ms. Jones announced that she is a smoker, but **Mr. Smith** is 100% right; this needs to change. **Mr. Grisso** wanted to make it clear that the Agency staff does not want to discriminate against people. **Ms. Ericksen** wanted to know why Westfield is non-smoking. **Mr. Grisso** stated that the Agency made an exception with regard to that particular development. More research is needed to see if that is possible for the Hugo development. **Mr. Barton** announced that Berkeley is a non-smoking city and this

appears somewhat arbitrary. **Mr. Grisso** stated that the Agency needs to study the language of the policy. **Mr. Range** believes that we should personally undertake this effort. Health care costs are sky rocketing and we should really undertake this effort. Airlines are non-smoking as are other industries that receive government funding. People do not smoke in schools or hospitals and the buildings that we develop should have a non-smoking policy. You have to be up front with renters when they sign their lease and if they do not want to live in a non-smoking building they can chose not to. **Mr. Range** supports the effort to try to make the Hugo a non-smoking building. Mercy Housing, who developed Westbrook Plaza, should use the same structure for the Hugo; their attorneys have already completed the research.

Mr. Smith agrees with **Mr. Range's** sentiments; it is the sole responsibility of the Property Manager to enforce the rules of the lease. **Mr. Curry** stated that he supports this effort and does not believe that you are denying anyone anything.

Ms. Connell-Henson wondered about overweight people living in the building. **Mr. Swenson** agreed with **Ms. Connell-Henson** and stated that you cannot tell people what they can and can't do in their homes. Evictions are very expensive. **Mr. Karnilowicz** stated that some people drink in their rooms, which costs the taxpayers money in health care costs. He is on the fence about this issue however; he would encourage Mercy Housing to explore this. **Ms. Jones** stated that she believes that this is a good idea to look towards the future. You have seniors and children that are exposed to second hand smoke and we need to make homes comfortable and smoke free. **Mr. Barton** wondered how you would enforce this. **Mr. Smith** stated that there are some SRO's that are non-smoking.

Mr. Smith made a motion and **Mr. Curry** seconded the motion.

Motion: *"The Housing Subcommittee recommends that the full PAC endorse the following action to be completed by the Agency:*

a. Researching a policy of a smoke free building for the Hugo Hotel development."

Mr. Range stated that Westbrook Plaza had to do this and Mercy Housing was able to declare that the building was non-smoking. They did not have any problems with this and the Agency can do the same for the Hugo. **Ms. Ericksen** stated that the Agency can just update the information from Mercy regarding the Westbrook Plaza.

A roll call vote was taken.

Those voting Yes: William Curry III, Christine Ericksen, Elaine Jones, Allan Manalo/Bindlestiff Studios, Charles Range/SOMHC and Raymon Smith

Those voting No: Artena Dickerson, Nan Connell-Henson, Nasir Patel, Antoinetta Stadlman and Mark Swenson

Those Abstaining: Steve Barton and Henry Karnilowicz

Vote: **Yes: 6** **No: 5** **Abstain: 2** **Motion Fails**

Agenda Item 8. Election of PAC Member Vacancies by Antoinetta Stadlman
(7:10 PM)

Ms. Stadlman announced that **Mr. Belton** is here tonight to apply for the vacant seat of SRO Residential Tenant. **Mr. Belton** introduced himself and stated that he lives at the Plaza Apartments on 6th and Howard. He was appointed to the Homeless Taskforce by Mayor Newsom. He would like to make a difference and give back to the community.

Mr. Smith made a motion and **Mr. Range** seconded the motion.

Motion: *"The PAC elects Henry Belton to fill the vacant seat of SRO Residential tenant."*

A roll call vote was taken.

Those voting Yes: Steve Barton, William Curry III, Artena Dickerson, Christine Ericksen, Nan Connell-Henson, Elaine Jones, Henry Karnilowicz, Allan Manalo/Bindlestiff Studios, Nasir Patel, Charles Range/SOMHC, Raymon Smith, Antoinetta Stadlman and Mark Swenson

Those voting No:

Those Abstaining:

Vote: Yes: 13 No: 0 Abstain: 0 Motion Passes

Agenda Item 9. Reports by Committee Chairs (7:15 PM)

PAC Comment on Non Agenda Items (7:15 PM)

Mr. Range wanted to know if the Agency has any plans to conduct a workshop regarding the closing of the Agency. Is there some plan of action as to what would happen if the governor got rid of the redevelopment agency. **Mr. Grisso** stated that this is a good question and the Agency would be offering alternatives. They will explain the plan, but it is too early to speculate and they will have to wait and see. **Mr. Manalo** wanted to know about mobilizing and what is being done. **Mr. Grisso** stated that he will speak to him after the meeting.

Public Comment (7:17 PM)

Meeting Adjourned (7:17 PM)

Antoinetta Stadlman
Chair