

SESSION OUTLINE



SESSION DATE:

Wednesday, September 5TH

SESSION TIME:

2:00pm to 5:00pm (Three hours total)

SESSION TITLE:

AMU - The Academy of Mixed-Use Off-Site Workshop
Mixed-Use project "reality" tour - Baldwin Park

SESSION DESCRIPTION:

Experience, first hand, one of the most "leading edge" mixed-use projects in the nation when you join your peers on this three hour, interactive tour of Baldwin Park. This development is an award winning infill New Urban village containing single family and multifamily housing of all types together with live/work, commercial, retail and office uses within a 600 acre site. Still under development, this tour explores the variety of product options that can advance a new urban concept and how they physically can be integrated into a heterogeneous setting with traditional neighborhood values. Led by some of the original planners and developers, this "back stage" tour will include a comprehensive examination of critical development aspects including:

- Density, zoning and planning strategies
- Parking, vehicle circulation and traffic patterns
- Market research decision points
- Blending of uses (retail, office, residential, live/work, etc)
- Open spaces, pocket parks, pedestrian vistas and sight lines
- Design strategies to increase the "walk ability"
- Learn actually worked and why

This off-site workshop program will feature an expert faculty of architects, developers and research professionals sharing site plans, project statistics, area market research reports and much more. If planning and developing a mixed use project is part of your strategy, don't miss this opportunity to learn from the best. These tours are limited to a small number of participants. Buses will leave Rosen Center promptly at 2:00pm and return by 5:00pm. Light snacks and drinks will be provided. Participants are encouraged to bring cameras and notepads.

SESSION LEADERS:

Jack Kern, Director of Research - Archstone Communities **(PRIMARY FACILITATOR)**
Ann T. Natunewicz, Director, Research - The Taubman Company
James Flick, Vice President of Research - JPI Properties
Sam Chandan, Chief Economist - REIS
Rich Hollander, President - Buxton Research
Greg Willett, Vice President - M/PF Yeildstar Research
Mark Jones, Principal - LRK Architects
Mike Sullivan, Principal - LRK Architects



SESSION LEADERS CONTACT INFORMATION:

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SESSION OUTLINE AND GENERAL INFORMATION:

If we have two buses:

Bus #1 – Willett, Flick, Hollander, Jones
Bus #2 – Chandan, Kern, Natunewicz, Sullivan

If we have three buses:

Bus #1 – Willett, Flick, Jones
Bus #2 – Hollander, Chandan, Sullivan
Bus #3 – Kern, Natunewicz, Petersen

NOTE: Session leaders must keep in mind that this “off-site” workshop is being conducted in the middle of the afternoon in Orlando in early September. We are anticipating a very warm, humid environment. We will be prepared to take advantage of water stops, snack breaks, etc. In addition, we will advise all attendees in advance that the tour is “on”, rain or shine, to bring an umbrella and be prepared to walk.

Bus Presentation (approximate 35 minute drive time)

Since a motorcoach has about 50 seats, the instructors will have about a dozen or more students in each group. We can break the groups up according to levels of interest/experience when they register. The more experienced get a slightly different discussion than the newer analysts or leasing people. parts to be assigned to team members)

1. Profile of Florida, with comparisons to Northern and Southern Florida, and other parts of the U.S. for scale, based on population and employment characteristics.
2. Profile of Orlando, with comparisons to similar sized cities across the U.S. based on employment, population, economic activity and retail sales.
3. Profile of Baldwin Park, with local demographics (detailed characteristics, i.e., age, income, homeownership/rental details) compared to the Orlando metro.
4. Definition of mixed use characteristics necessary for planning and successful execution.

Arrive at Baldwin Park and break into individual teams

Each group takes a preset tour of the property with the local architect/planner who worked on it, highlighting the land use, planning and development considerations. Our expert instructors can point out whatever they deem appropriate as they see things. I would expect to have the local guys, plus one or two of ours tagging along.

Return Bus Presentation (on trip back to Rosen Shingle Creek Resort - approximate 45 minute drive time)

During the return ride to the resort, session leaders should be prepared to lead group discussions that include the following:

1. Lessons learned, discussion focused on Baldwin Park
2. Important considerations for future project planning, renter and retailer perspective
3. Unconventional observations from past experience, what doesn't always seem obvious

Session Leader Conference Call:

In order to complete the planning for this off-site workshop session, all session leaders are encouraged to participate in a conference call to further discuss the details, questions and remaining preparation tasks. Our conference call should be no longer than 30-40 minutes in length and is scheduled as follows:

TUESDAY, JULY 10TH 10:00am CST
DIALING INSTRUCTIONS: (866) 826-9133 Passcode: 8176027035

SESSION OUTLINE



SESSION DATE/TIME:

Thursday, September 6TH
9:45am to 11:00am (75 minutes total)

SESSION TITLE:

AMU1 - What do retailers want:
Designing spaces that stay full!

SESSION DESCRIPTION:

For mixed-use projects to be successful, each component must be uncompromisingly designed to function individually as well as a part of the overall whole. Many mixed-use developers began their careers in the residential industry and may not have the benefit of retail or commercial development. The exciting news is that experts are projecting retail development activity will hit record levels in 2007 and 2008 – levels almost double historical performance. What are the driving forces behind this rapid growth and where are the greatest opportunities?

This session will focus on how to create retail spaces that respond to the absolute requirements of the industry as well as the wants and needs of innovative retailers. Topics will include lighting, parking, signage, visibility, structure dimensions, accessibility issues, stocking of inventory, trash removal, venting and HVAC systems, etc. In addition, this session will address how to identify the categories of retailers that will be attracted to your mixed-use project and how to best gather and present the information that is important to them. Attend this vital session and learn how to create successful mixed-use developments – not vacant retail spaces.

SESSION LEADERS:

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SESSION OUTLINE AND GENERAL INFORMATION:

The schedule below was prepared based on each speaker making separate presentations rather than an active, more improvisational panel discussion. As a group, we can make the decision to go either way as we consider how to present our information in the most interesting and effective way. In either scenario, we want to engage our audience through our discussions of practical lessons learned in creating retail spaces, balancing residential and office with retail and covering the viewpoints of all parties (retailers, residents, office tenants, community in the area, governments).

9:45am to 9:50am INTRODUCTION AND ANNOUNCEMENTS (Joe Petersen)

9:50am to 10:05am Research considerations from a market and property perspective (James Flick)

How to use best practices research to determine the viability of your mixed use project?

10:05am to 10:20am The neighborhood customer and renter choice considerations (Jack Kern)

What are customers thinking and how do you appeal to them in the property?
What common mistakes do developers make when building mixed use?

10:20am to 10:35am Case study: Retailers needs and decision criteria (Rich Hollander)

Best methods to select retailers for the project.
What do retailers really want and how do you attract them to your project?
What have retailers learned about mixed use that you need to know?

10:35am to 10:50am Design considerations in blending uses (Kelly Davis)

Introduction of mixed use and explains the importance of retail to a successful project, shows photos, examples and covers the municipal considerations. Topics also include:

- A. Lighting
- B. Parking
- C. Signage and visibility
- E. Structure dimensions
- F. Accessibility issues
- G. Stocking of inventory
- H. Trash removal
- I. Venting and HVAC systems

10:50am to 11:00am SUMMARY AND QUESTIONS

Session Leader Conference Call:

In order to complete the planning for this important session, all session leaders are encouraged to participate in a conference call to further discuss the details, questions and remaining preparation tasks. Our conference call should be no longer than 30-40 minutes in length and is scheduled as follows:

THURSDAY, JULY 12TH 10:00am CST
DIALING INSTRUCTIONS: (866) 826-9133 Passcode: 8176027035

SESSION OUTLINE

SESSION DATE:

Thursday, September 6TH

SESSION TIME:

2:00pm to 3:15pm (75 minutes total)

SESSION TITLE:

AMU2 - Live/Work that works:
Achieving great returns with great designs!

SESSION DESCRIPTION:

The rise of the internet, telecommuting, and even teleconferencing has created unprecedented opportunities for home office and small, at-home business ventures. In fact, statistics show that almost 40% of the new businesses created in the United States are "home based" ventures. When designed and executed properly, live/work spaces can play a vital role in creating a lively mixed-use district, often aiding the transition between residential and commercial areas, between downtown commercial and industrial neighborhoods or on residential neighborhood edges. These spaces often become "business incubators" and can offer a tremendous boost to your development strategies in aiding with zoning issues as well as differentiating your product offerings in the marketplace. While this product type is offering unprecedented growth opportunities, developers of these unique spaces must understand the importance of the delicate balance required when blending commercial and residential spaces. This expert panel will share stories of success as well as cautionary tales regarding the design, marketing and operations of live/work development.

SESSION LEADERS:

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SESSION OUTLINE AND GENERAL INFORMATION:

The schedule below was prepared based on each speaker making separate presentations rather than an active, more improvisational panel discussion. As a group, we can make the decision to go either way as we consider how to present our information in the most interesting and effective way. In either scenario, we want to engage our audience through our discussions of practical lessons learned in creating effective and successful live/work designs, balancing residential uses with office and covering the viewpoints of all parties (designers residents, office users, community in the area, governments, etc). In this session, we want to introduce the various concepts and strategies for designing, building and operating live/work homes and the many challenges that must be addressed. Topics also should include:

- A. Zoning
- B. Configurations
- C. Signage and visibility
- E. Structure dimensions
- F. Accessibility issues
- G. Stocking of inventory
- H. Appropriate types of uses
- I. Other?

2:00pm to 2:10pm	INTRODUCTION AND ANNOUNCEMENTS (Joe Petersen)
2:10pm to 2:25pm	Case studies, design considerations and lessons learned (Mike Sullivan) How to use best practices to create successful live/work homes. What are customers thinking and how do you appeal to them in the property? What common mistakes do developers make when building live/work spaces?
2:25pm to 2:40pm	Case studies, design considerations and lessons learned (Paul Campbell) How to use best practices to create successful live/work homes. What are customers thinking and how do you appeal to them in the property? What common mistakes do developers make when building live/work spaces?
2:40pm to 2:50pm	Case studies, design considerations and lessons learned (Joe Petersen) How to use best practices to create successful live/work homes. What are customers thinking and how do you appeal to them in the property? What common mistakes do developers make when building live/work spaces?
2:50pm to 3:15pm	SUMMARY AND QUESTIONS

Session Leader Conference Call:

In order to complete the planning for this important session, all session leaders are encouraged to participate in a conference call to further discuss the details, questions and remaining preparation tasks. Our conference call should be no longer than 30-40 minutes in length and is scheduled as follows:

THURSDAY, JULY 12TH 11:00am CST
DIALING INSTRUCTIONS: (866) 826-9133 Passcode: 8176027035

SESSION OUTLINE

SESSION DATE:

Thursday, September 6TH

SESSION TIME:

3:30pm to 4:45pm (75 minutes total)

SESSION TITLE:

AMU3 - Doing it right: Design, construction and marketing solutions that will improve your development returns

SESSION DESCRIPTION:

In this all-new session, a panel of residential and retail industry experts will offer an in-depth perspective on the current “best practices” and state-of-the-art mixed-use design and development strategies. Our panelists will discuss the most important issues and trends that are shaping today’s mixed-use developments. From large, sprawling sites in emerging markets to niche, in-fill opportunities in mature locations, how can we offer the best mix of complementary retail, residential and commercial and how have projects changed over recent years. If you are active involved in the mixed-use industry, you can’t afford to miss this timely and vital information.

SESSION SPEAKERS:

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- A. Zoning
- B. Configurations
- C. Accessibility issues
- D. Pro forma objectives
- E. Appropriate blendings of uses
- F. Marketing methods
- G. Dealing with design and use conflicts
- H. Lessons learned through case studies
- I. Other?

3:30pm to 3:35pm	INTRODUCTION AND ANNOUNCEMENTS (Joe Petersen)
3:35pm to 3:55pm	Case studies, design considerations and lessons learned (Jeffrey Resetco) Development considerations More detail:
3:55pm to 4:15pm	Case studies, design considerations and lessons learned (Rick Hammann) Design focus More detail:
4:15pm to 4:35pm	Case studies, design considerations and lessons learned (Chris Ballard) Marketing focus More detail:
4:35pm to 4:45pm	SUMMARY AND QUESTIONS

Session Leader Conference Call:

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THURSDAY, JULY 12TH 12:00pm CST
DIALING INSTRUCTIONS: (866) 826-9133 Passcode: 8176027035

SESSION OUTLINE

SESSION DATE:

Friday, September 7TH

SESSION TIME:

8:30am to 9:45am (75 minutes total)

SESSION TITLE:

AMU4 - Zoning Success:
Gaining residential density through adding uses

SESSION DESCRIPTION:

Traditional zoning was developed during a time when factories and many commercial uses were noisy, smelly, and/or hazardous to public health. To protect both public health and residential property values, early zoning focused on separating different uses and buffering them from each other to minimize nuisances as well as to add restrictions on higher density residential projects. Today, mixed-use developers across the nation are being welcomed by cities that once opposed multifamily proposals. This session will examine a variety of high density/mixed-use projects, densities, economics and strategies for success. Learn from developers, architects and land planners as they explain the details of creative, mixed-use projects and the unique planning that contributed to these successes.

SESSION LEADERS:

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- A. Zoning
- B. Configurations
- C. Accessibility issues
- D. Pro forma objectives
- E. Appropriate blendings of uses
- F. Marketing methods
- G. Dealing with design and use conflicts
- H. Lessons learned through case studies
- I. Other?

8:30am to 8:35am	INTRODUCTION AND ANNOUNCEMENTS (Joe Petersen)
8:35am to 8:55am	Case studies, design considerations and lessons learned (Bruce Wise) Development considerations More detail:
8:55am to 9:15am	Case studies, design considerations and lessons learned (Greg Faulkner) Design focus More detail:
9:15am to 9:35am	Case studies, design considerations and lessons learned (Stephen Alicandro) Design and marketing focus More detail:
9:35am to 9:45am	SUMMARY AND QUESTIONS

Session Leader Conference Call:

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THURSDAY, JULY 12TH 1:00pm CST

DIALING INSTRUCTIONS: (866) 826-9133 Passcode: 8176027035

SESSION OUTLINE

SESSION DATE:

Friday, September 7TH

SESSION TIME:

10:00am to 11:15am (75 minutes total)

SESSION TITLE:

AMU5 - Marketing Masters:
Planning, budgeting and executing your mixed-use marketing strategies

SESSION DESCRIPTION:

This final Academy of Mixed-Use session will provide participants with real life case studies of marketing strategies for premium mixed-use developments. How do you effectively “pre-sell” your product and engage your customer in the design process? More specifically, what are proven strategies which will help you:

1. Create Awareness
2. Create Demand
3. Measure Demand
4. Engage Your Prospect Personally
5. Provide Updates

Jim Muir, a seasoned development marketing professional, will lead you through this 5-step cycle and show you specific tools and approaches from case studies which will open up an entirely new approach to marketing your community. You will leave with key notes from these steps which will help you build an effective marketing program.

Upon conclusion of this session, all Academy of Mixed-Use conference graduates will receive AMU Alumni shirts and personalized diploma certificates.

SESSION LEADER:

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