



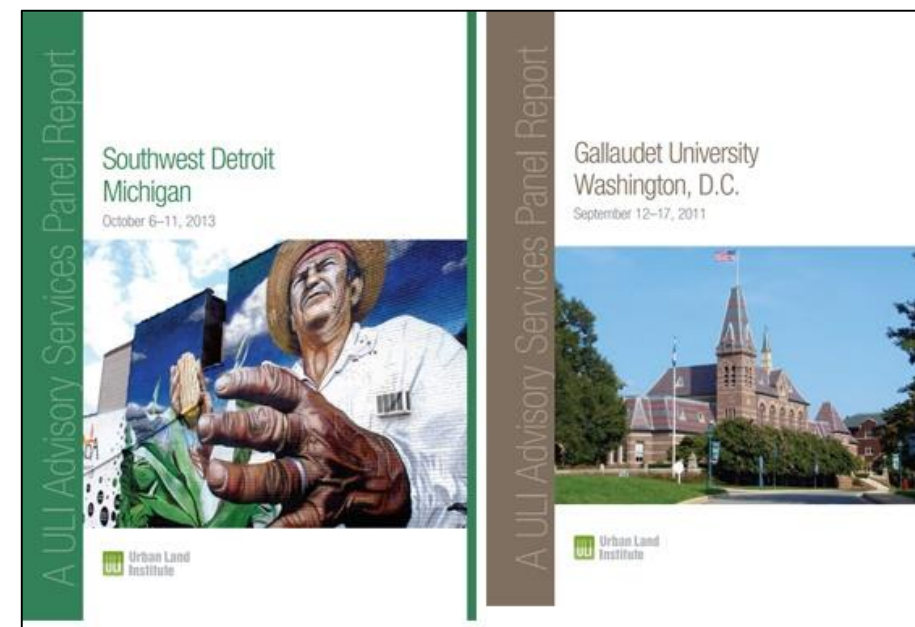
**Urban Land
Institute**

Advisory Services Program

Kansas City North Loop
September 17 - 22, 2017

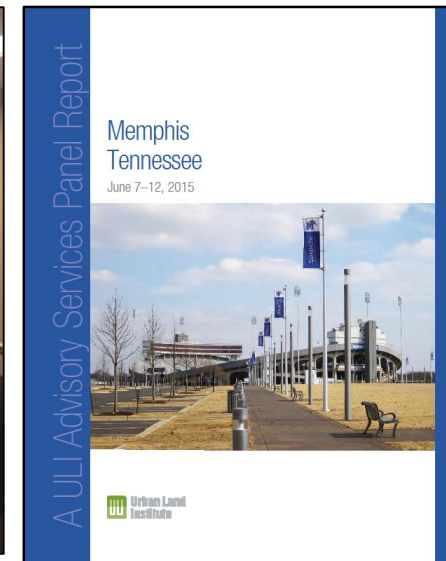
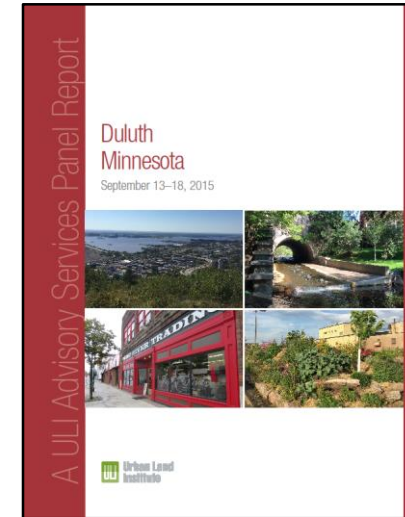
About the Urban Land Institute

- The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.
- ULI is a membership organization with nearly 40,000 members, worldwide representing the spectrum of real estate development, land use planning and financial disciplines, working in private enterprise and public service.
- What the Urban Land Institute does:
 - Conducts Research
 - Provides a forum for sharing of best practices
 - Writes, edits and publishes books and magazines
 - Organizes and conducts meetings
 - Directs outreach programs
 - Conducts Advisory Services Panels



The Advisory Services Program

- Since 1947
- 15-20 panels a year on a variety of land use subjects
- Provides independent, objective candid advice on important land use and real estate issues
- Process
 - Review background materials
 - Receive a sponsor presentation and tour
 - Conduct stakeholder interviews
 - Consider data, frame issues and write recommendations
 - Make presentation
 - Produce a final report



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Panelists

- Glenda Hood, triSect, LLC – Orlando, FL
- Dean D. Bellas, Urban Analytics, Inc. – Alexandria, VA
- Bill Clarke, Planning Consultant – Ross, CA
- David Greensfelder, Greensfelder Commercial Real Estate LLC – San Francisco, CA
- April Anderson Lamoureux, Anderson Strategic Advisors, LLC – Boston, MA
- Todd Meyer, Forum Studio – Chicago, IL
- Adam Weers, Trammell Crow Company – Washington, DC
- John Paul Weesner, Kittleson & Associates – Orlando, FL

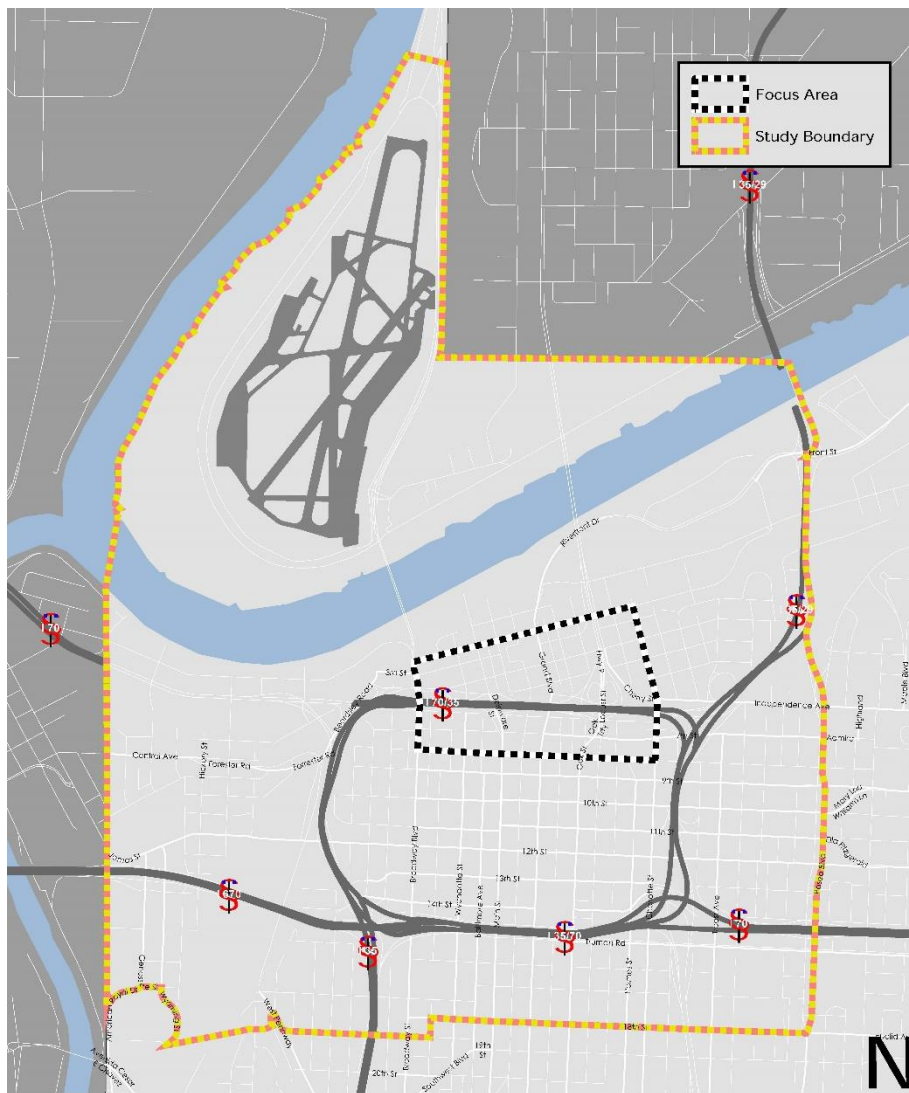


Urban Land Institute Staff

- Beth Silverman – Senior Director, Advisory Services
- Grace Hill – Senior Associate, Meetings and Events
- Cali Slepín – Associate, Advisory Services



Panel Study Area



The Assignment

- What is the value of land in and around the North Loop?
- What is its optimal use considering adjacent communities, KC's goals and vision for the future, and effects on transportation infrastructure?
- What successful solutions to similar projects?
- What part of the North Loop has the most value for potential development?
- What is the optimal use for the North Loop study area?
- Next steps

Presentation Overview

- I. Introduction
- II. Where You Are Now: Economic and Market Snapshot
- III. Restoring the City's Legacy
- IV. If You Build It...?
- V. It's a Marathon, Not a Sprint
- VI. Conclusion

Presentation Overview

I. Introduction

II. Where You Are Now: Economic and Market Snapshot

III. Restoring the City's Legacy

IV. If You Build It...?

V. It's a Marathon, Not a Sprint

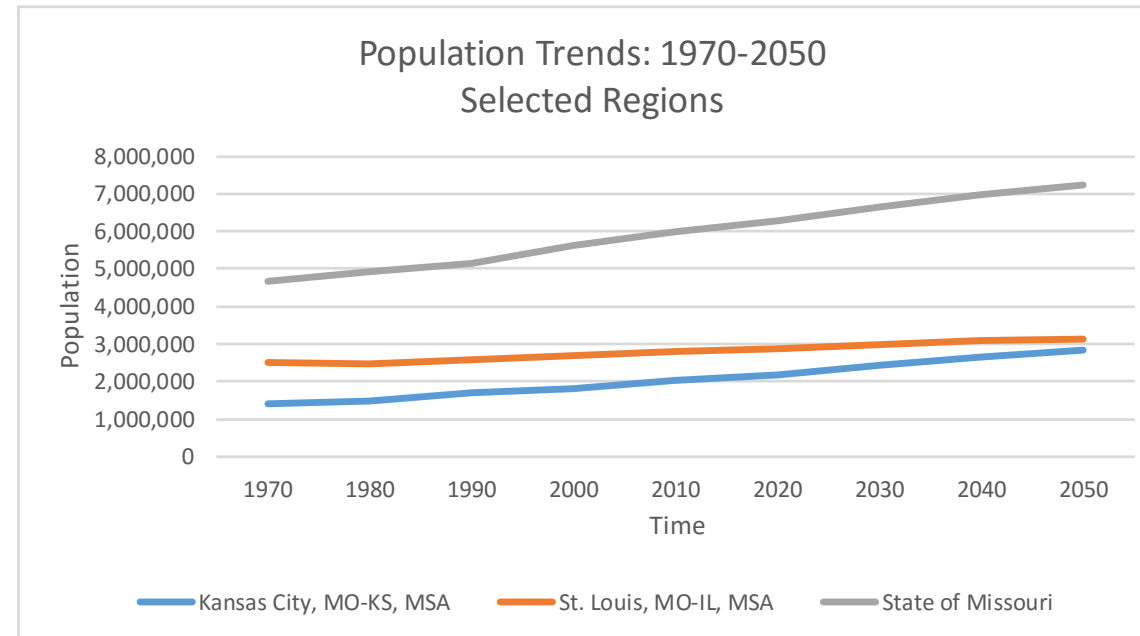
VI. Conclusion

Understanding Economic Development

<i>Category</i>	<i>Definition</i>	<i>Example</i>	<i>Measurement</i>
Economic Growth	Growth in outputs.	Population grows over time. Income remains constant.	Change in aggregate income.
Economic Development	Growth in outputs occur from a change in the structure of industry sectors.	Employment growth by sector. Income grows over time.	Change in income per capita.
Economic Resiliency	The capacity and ability of the economic base to return to (or improve upon) its prior state after an external adverse economic shock or stress.	Change in global, national or regional economies caused by external factors.	Change in gross domestic product (city, county, state, nation).

Source: uli-The Urban Land Institute; Urban Analytics, Inc.

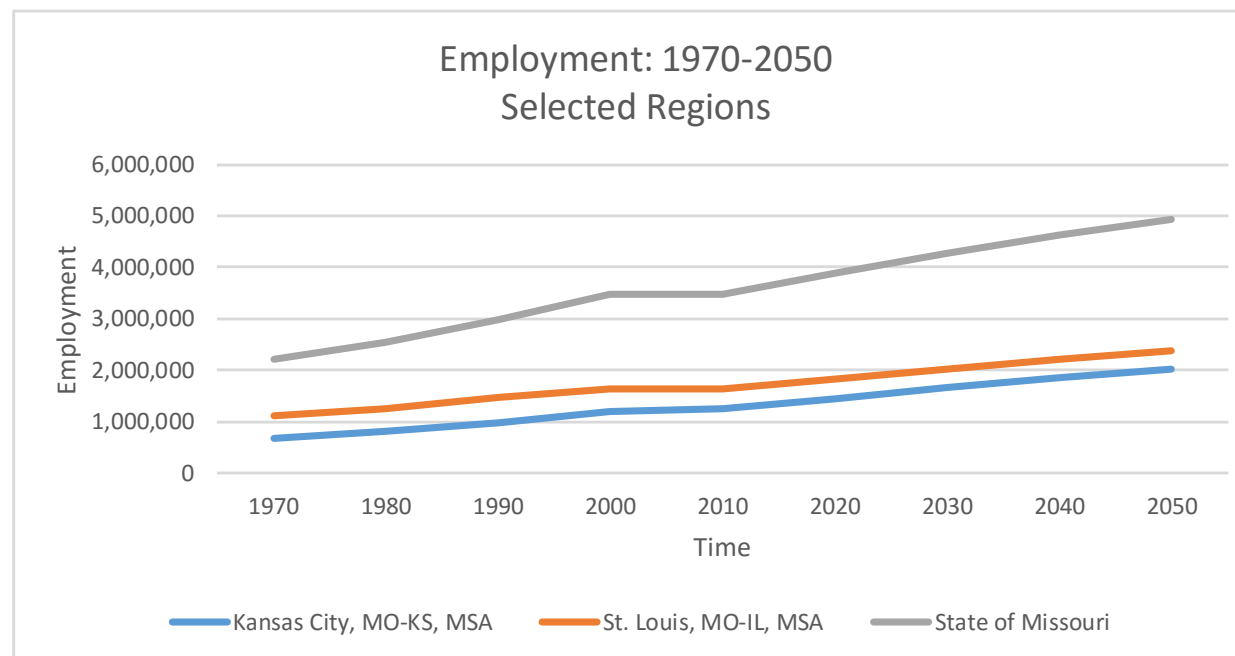
Population Trends: 1970-2051



	<u>1970</u>	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2010</u>	<u>2020</u>	<u>2030</u>	<u>2040</u>	<u>2050</u>
Kansas City, MO-KS, MSA	1,420,070	1,484,497	1,710,587	1,817,929	2,013,703	2,195,467	2,426,308	2,645,411	2,846,878
St. Louis, MO-IL, MSA	2,519,712	2,487,085	2,565,020	2,678,822	2,790,026	2,872,135	2,994,630	3,081,045	3,129,926
State of Missouri	4,686,127	4,923,002	5,128,880	5,607,285	5,996,052	6,273,843	6,665,432	6,986,254	7,228,615

Source: uli - The Urban Land Institute; U.S. Census Bureau; Woods and Poole Economics, Inc.; Urban Analytics, Inc.

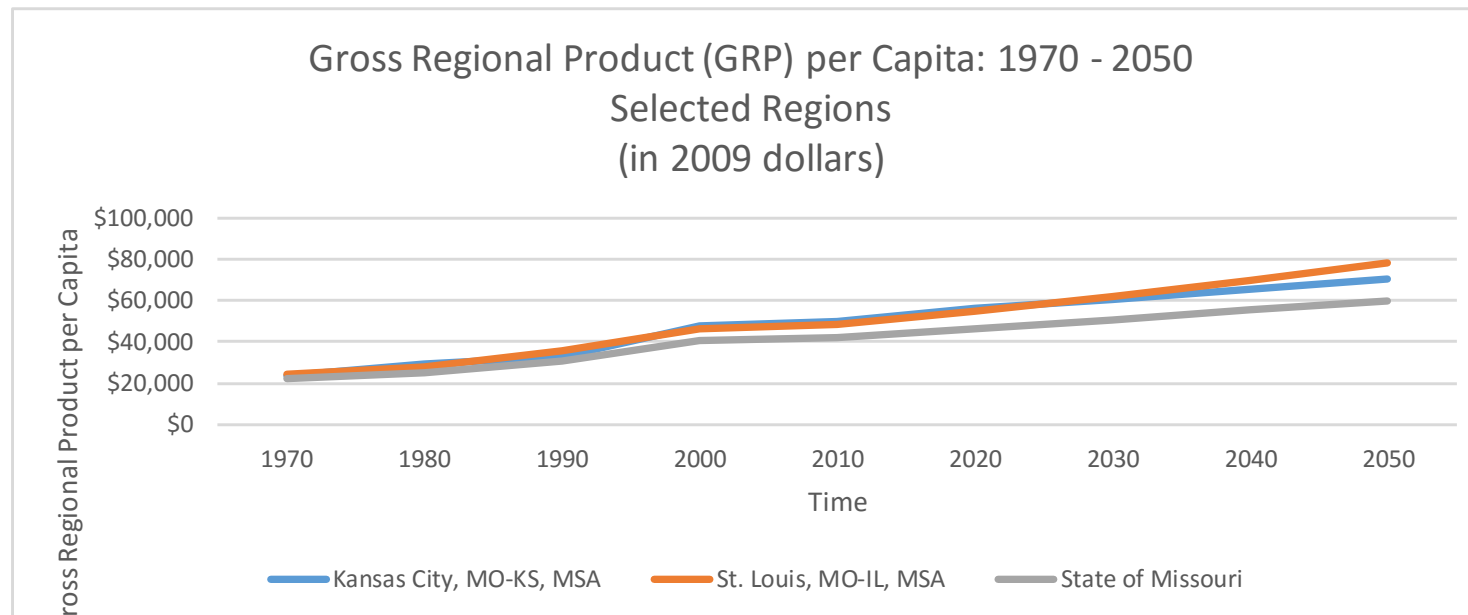
Employment: 1970-2051



	<u>1970</u>	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2010</u>	<u>2020</u>	<u>2030</u>	<u>2040</u>	<u>2050</u>
Kansas City, MO-KS, MSA	675,661	822,289	985,241	1,200,615	1,237,812	1,449,865	1,653,566	1,845,504	2,029,063
St. Louis, MO-IL, MSA	1,119,826	1,261,117	1,465,073	1,643,459	1,644,701	1,836,024	2,029,704	2,204,496	2,364,674
State of Missouri	2,207,944	2,552,242	2,977,478	3,472,601	3,476,821	3,881,070	4,275,483	4,617,515	4,926,753

Source : uli – The Urban Land Institute; U.S. Bureau of Labor Statistics; Woods & Poole Economics, Inc.; Urban Analytics, Inc.

Gross Regional Product Per Capita: 1970-2050



	<u>1970</u>	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2010</u>	<u>2020</u>	<u>2030</u>	<u>2040</u>	<u>2050</u>
Kansas City, MO-KS, MSA	\$23,443	\$29,075	\$33,100	\$47,350	\$49,781	\$56,147	\$60,664	\$65,335	\$70,621
St. Louis, MO-IL, MSA	\$24,175	\$28,096	\$35,562	\$46,114	\$48,147	\$54,545	\$61,871	\$69,751	\$78,534
State of Missouri	\$21,949	\$25,010	\$30,929	\$40,489	\$41,978	\$46,518	\$50,855	\$55,233	\$60,015

Source : ULI-The Urban Land Institute; U.S. Bureau of Economic Analysis; U.S. Bureau of Labor; U.S. Census Bureau; Woods and Poole Economics, Inc.; Urban Analytics, Inc.

Market Analysis ... A Closer Look

Background and Introduction

As part of our market analysis, we have been asked to consider:

- Quality of life impacts to DT and nearby neighborhoods;
- Regional impacts to the Kansas City MSA (or metropolitan statistical area); and,
- Potential trade-offs of place making as opposed to maximizing return on investment.

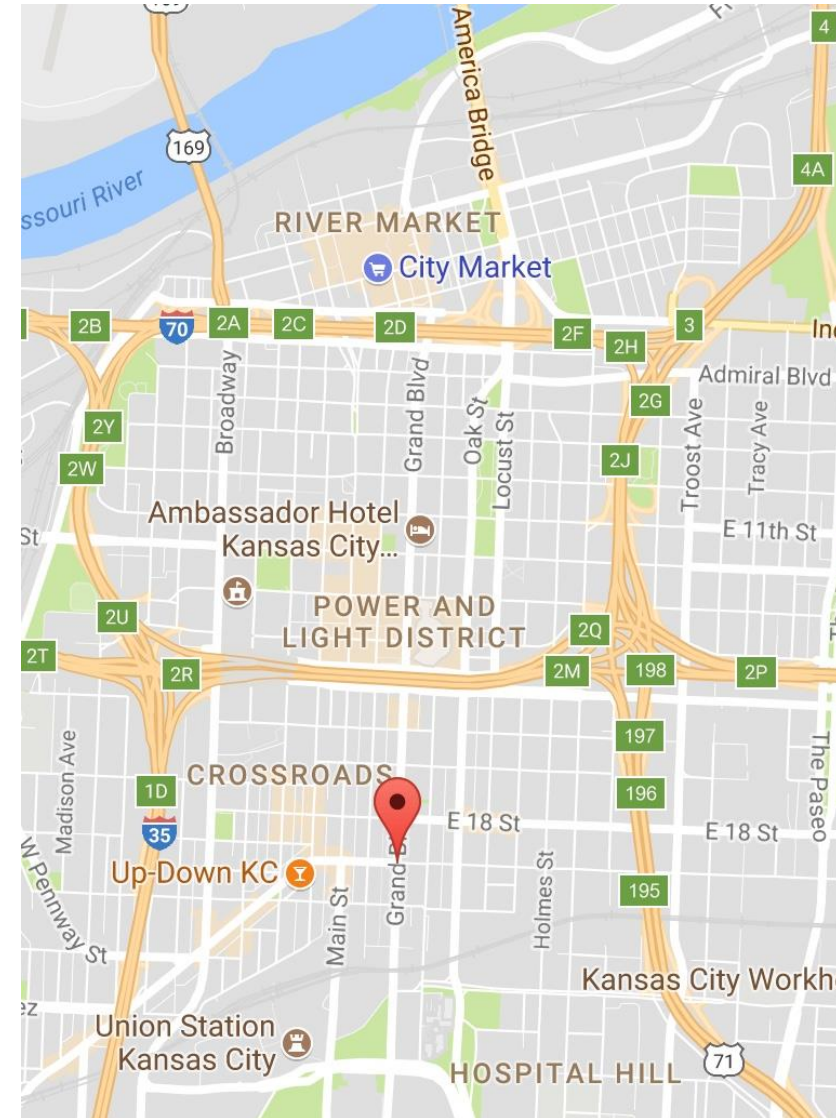


Market Analysis ... A Closer Look

Definition of the Analysis Area

For this market analysis, we have defined the “Analysis Area” as:

- River Market,
- Columbus Square,
- Downtown CBD, and
- Crossroads.



Market Analysis ... A Closer Look

Population

- The MSA's 2010 population of just over 2,000,000 will grow over 30% by 2040.
- Jackson County will barely grow at all during that period.

	2010	2020	2030	2040
MSA	2,013,703	2,195,467	2,426,308	2,645,411
KC/Jackson County	-7,774	1,918	8,163	2,307

- Downtown's population has grown from 8,581 in 2000 to 12,165 in 2015.
- While the increase in Downtown's population is modest, it represents a positive trend, and a trend to build on while looking towards the future.

Source: MARC, US Census Bureau

Market Analysis ... A Closer Look

Office

Office statistics for the Analysis Area:

Office	Total SF	Absorb SF/Yr /Absorb %/Yr	Delivery YTD	Under Cost	Asking Rents
MSA	103,722,656	3,193,772 / 3.1%	1,537,325	185,586	\$18.17/SF/yr
Analysis Area	26,514,004	450,130 / 1.7%	142,717	0	\$18.18/SF/yr

- Vacancy rate for the Analysis Area and the MSA are the same at 9.3%.
- Kansas is seeing an outsize amount of the MSA's economic growth.

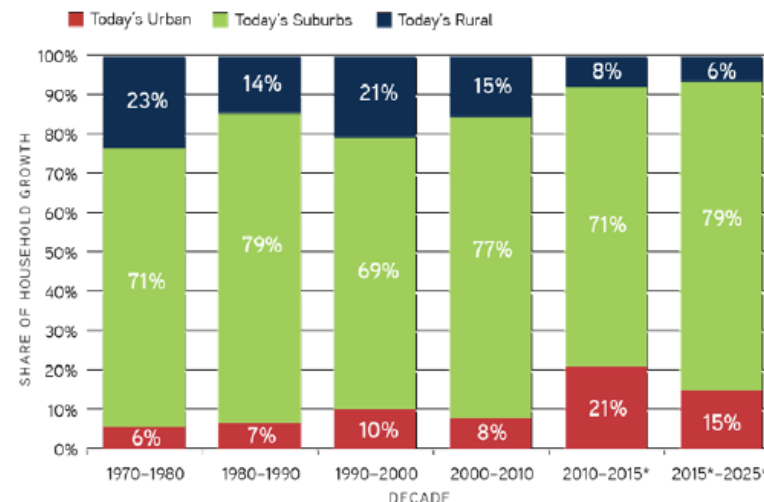
Source: Colliers

Market Analysis ... A Closer Look

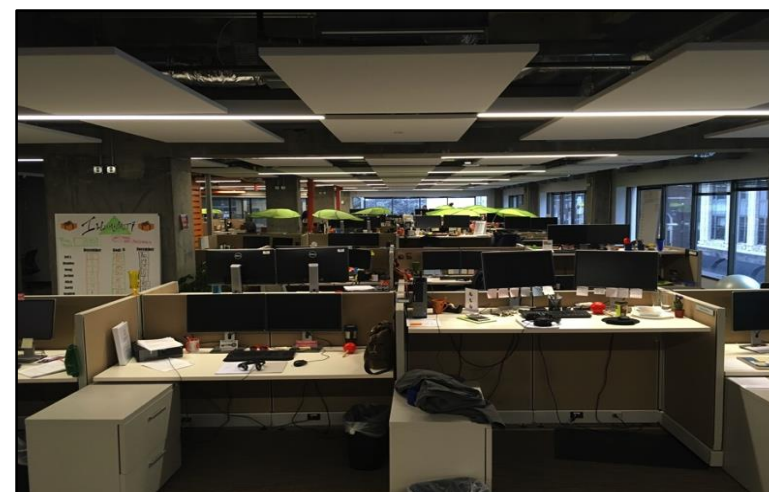
Office Trends

- The oldest Millennials are moving into senior management roles.
- Many Millennials have formed households, but have delayed marriage and children.
- The transition to family mode will correspond in a suburban migration.
 - This trend has started.
 - It is driven by the desire to live in good school district and near amenities.
- Suburban offices designed for flexible work lives and working part time from home will be in demand.
- Women earned 58% of this generation's college degrees, so female executives will play a prominent role in office space selection.

(Source: ULI, Greensfelder Commercial Real Estate)



Source: John Burns Real Estate Consulting LLC calculations using U.S. Census Bureau data.
*projection



Market Analysis ... A Closer Look

Office

Implications for the Kansas City MSA:

- Most new office construction has taken place in the suburbs, most notably in Johnson County, Kansas. This will continue.
- Office vacancy rates have decreased in the CBD, but because office space has been converted to other uses.
- New office buildings in the CBD will be user-driven, not spec.

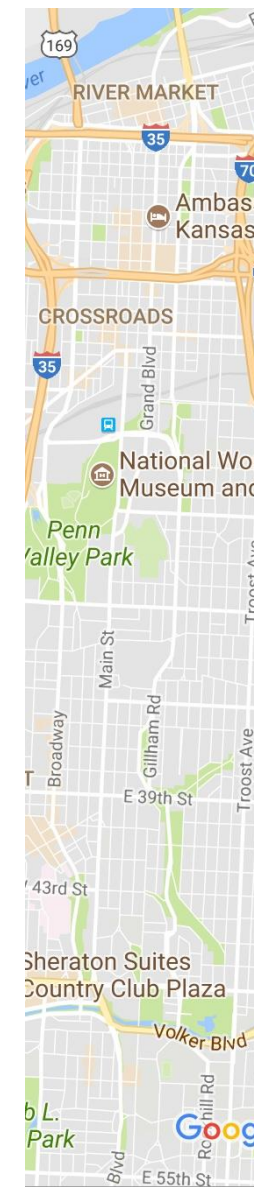


Market Analysis ... A Closer Look

Residential (Rental)

Residential rental statistics includes the Analysis Area and extends to approximately the Brookside neighborhood:

	Total Units	Vac%	UC/Deliveries	Asking Rents	Rent Growth	Turnover
MSA	151,287	5.2%	5,749/870	\$11.76/SF/yr	2.9% YoY	2.9%
Central KC	22,605	6.3%	N/A N/A	\$16.326/SF/yr	3.0% YoY	7.7%



Market Analysis ... A Closer Look

Residential (Rental)

Residential trends affecting the Analysis Area are:

- Boomers are retiring.
- KC has an affordable housing supply and elastic land supply
- Rising wages for many people supports higher rates of home ownership.

(Source: ULI, Greensfelder Commercial Real Estate)



Market Analysis ... A Closer Look

Residential (Rental)

Implications for the Kansas City MSA:

- Increased new DT residential development including conversions will have at most a modest impact on the region.
- It is possible that the rate of migration to the Study Area will come to be driven by Boomers more than by Millennials.



Market Analysis ... A Closer Look

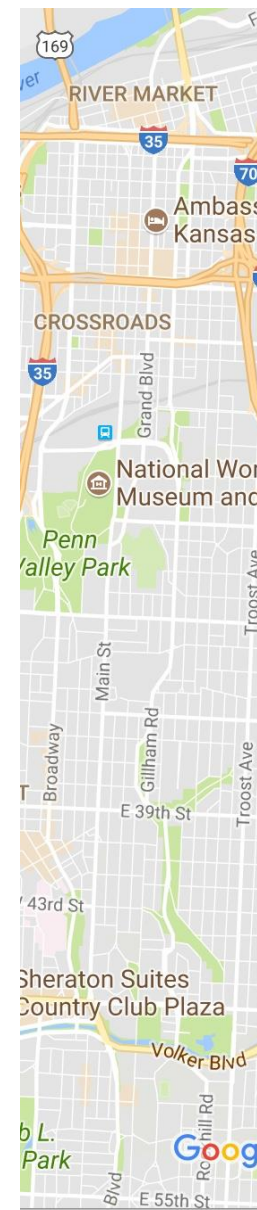
Retail

Retail comprises a much smaller percentage of Downtown space.

For retail, we are using a Modified Analysis Area that includes the Analysis Area, West Bottoms, Crown Center, Midtown, Country Club Plaza, and Brookside neighborhoods.

	Total SF	Vac%	AbsorbYTD	Asking Rents
MSA	111,388,406	6.1%	480,466	\$13.22/SF/yr NNN
Modified Analysis Area	8,911,759	3.4%	-24,412	\$11.42/SF/yr NNN

Source: Colliers



Market Analysis ... A Closer Look

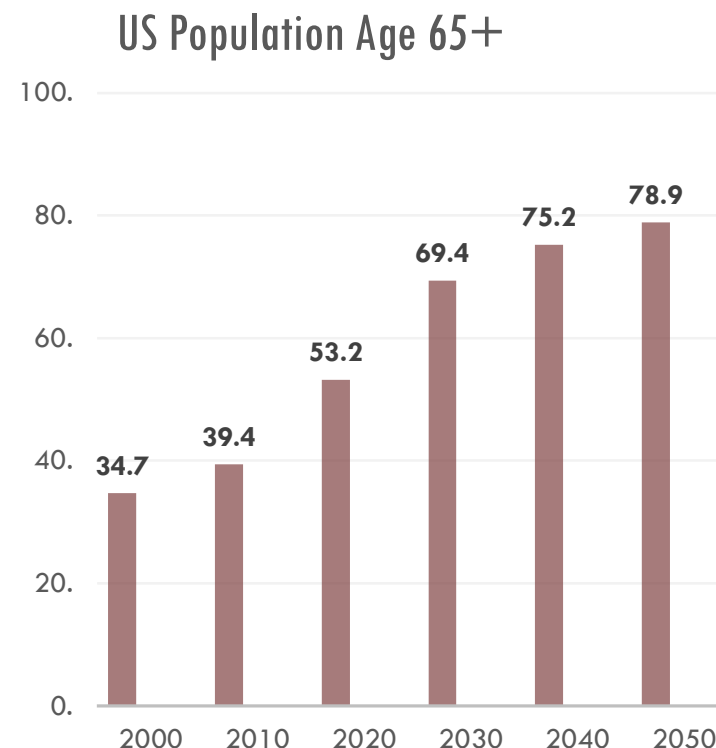
Retail

Retail trends affecting the Modified Analysis Area:

Boomers:

- By 2030, almost 70MM people will be age 65+, and most will be healthy.
- Boomer's primary purchasing categories will be food, gifts, housewares, clothes, travel, medical related items.
- Boomer's primary purchasing channels will be accessible stores, internet, and delivery services.

(Source: ULI, Greensfelder Commercial Real Estate)



Market Analysis ... A Closer Look

Retail

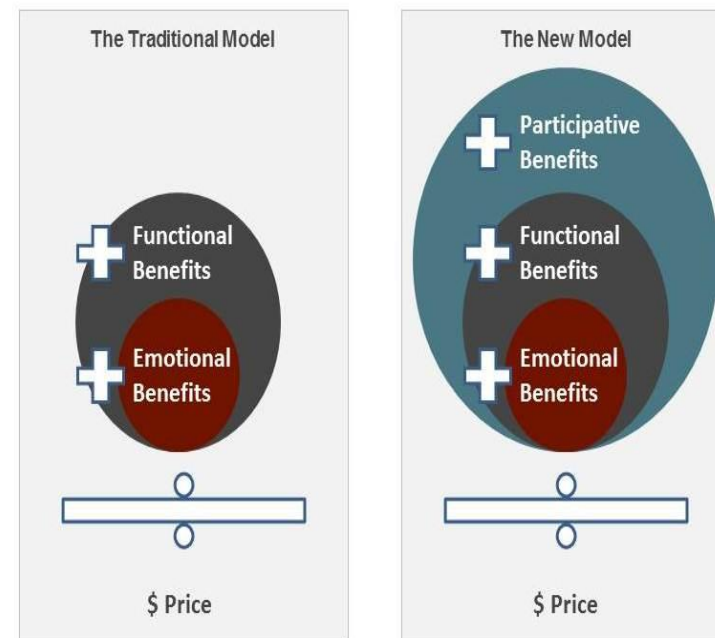
Retail trends affecting the Modified Analysis Area:

Millennials:

- An estimated 80 million millennials were born between 1980 and 2000.
- Millennials constitute the largest generation in US history.
- Millennials use technology and internet shopping freely, and are more brand-loyal than their parents.
- Millennials are also 50% more likely to buy on impulse than Boomers.

(Source: ULI, Greensfelder Commercial Real Estate)

Brand Value Marketing Equation



Market Analysis ... A Closer Look

Hospitality

Quick facts:

- The Kansas City region welcomed 25.2 million visitors in 2016, a new record!
- 2016's 25 largest conventions used 213,373, or only 28% of Downtown hotel capacity.
- Despite low utilization, several new hotel projects are proposed and under construction including an 800-room Lowe's convention hotel.
- On the surface there appears to be an excess of hotel space in the Analysis Area, particularly when hotels near the airport and in Johnson County, Kansas are factored in.

Source: Kansas City Business Journal, Kansas City Star.



Market Analysis ... A Closer Look

Observations

- The Kansas City region's 2010 population of 2,100,000 is expected to grow by almost 600,000 by 2040, a 28% increase.
- Over 90% of that population increase will occur outside of the Analysis Area.
- Over 250,000 of growth will occur in Johnson County, Kansas, and over 100,000 in Clay County, Missouri.



Market Analysis ... A Closer Look

Observations

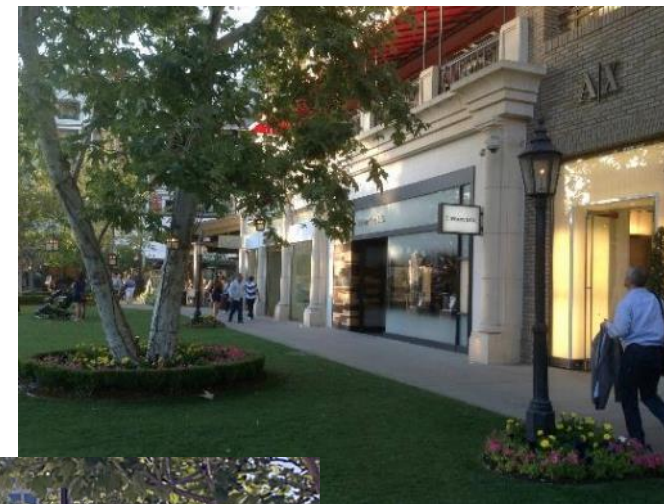
- The DT core is substantially stronger than it has been in the past.
- Downtown has already become a true mixed use neighborhood as well as a more compelling destination for residents and visitors alike.



Market Analysis ... A Closer Look

Observations

- Downtown's emergence as an entertainment destination and as a mixed-use community means there is the opportunity for it to see an outsize amount of future growth.
- Creating a strong Downtown Core identity will only help strengthen the Kansas City MSA's image throughout the region.



Market Analysis ... A Closer Look

Observations

- Office, residential and retail growth will follow the demand created by an area's population growth.
- In Downtown's case, retail is primarily food, beverage, and entertainment,
- This type of retail which caters to daytime workers, residents, and visitors, will play an important role in Downtown becoming a regional destination.



Market Analysis ... A Closer Look

Conclusion

- If the Analysis Area's "brand" and amenities such as open space are well articulated and managed, the Analysis Area could compete with Union Station to become the area's "public living room."
- Active uses on ground floors, transportation linkages between sub-markets, and an eye to walking and biking connections are prerequisites to desirability for businesses and residents alike.



Market Analysis ... A Closer Look

Conclusion

- Low and mid-rise construction is less expensive.
- “Human scale” can anchor a strong regional core.
- A skyline can define an area, but
- Aim for a world class environment in which to live, work, and play by focusing on achievable objectives!



Presentation Overview

- I. Introduction
- II. Where You Are Now: Economic and Market Snapshot
- III. *Restoring the City's Legacy***
- IV. If You Build It...?
- V. It's a Marathon, Not a Sprint
- VI. Conclusion

- **Panel Vision + Mission Statement**

- Rethink the North Loop as a Wide Interstate and Consider New Open Space and Development Opportunities

- **Setting | Context**

- Planning Documents
- Technical Advisory Panel (TAP)
- Beyond the Loop (PEL)
- Study Area



169

9

I-70

I-35

I-70

Focus Area

Panel Study Area



Planning

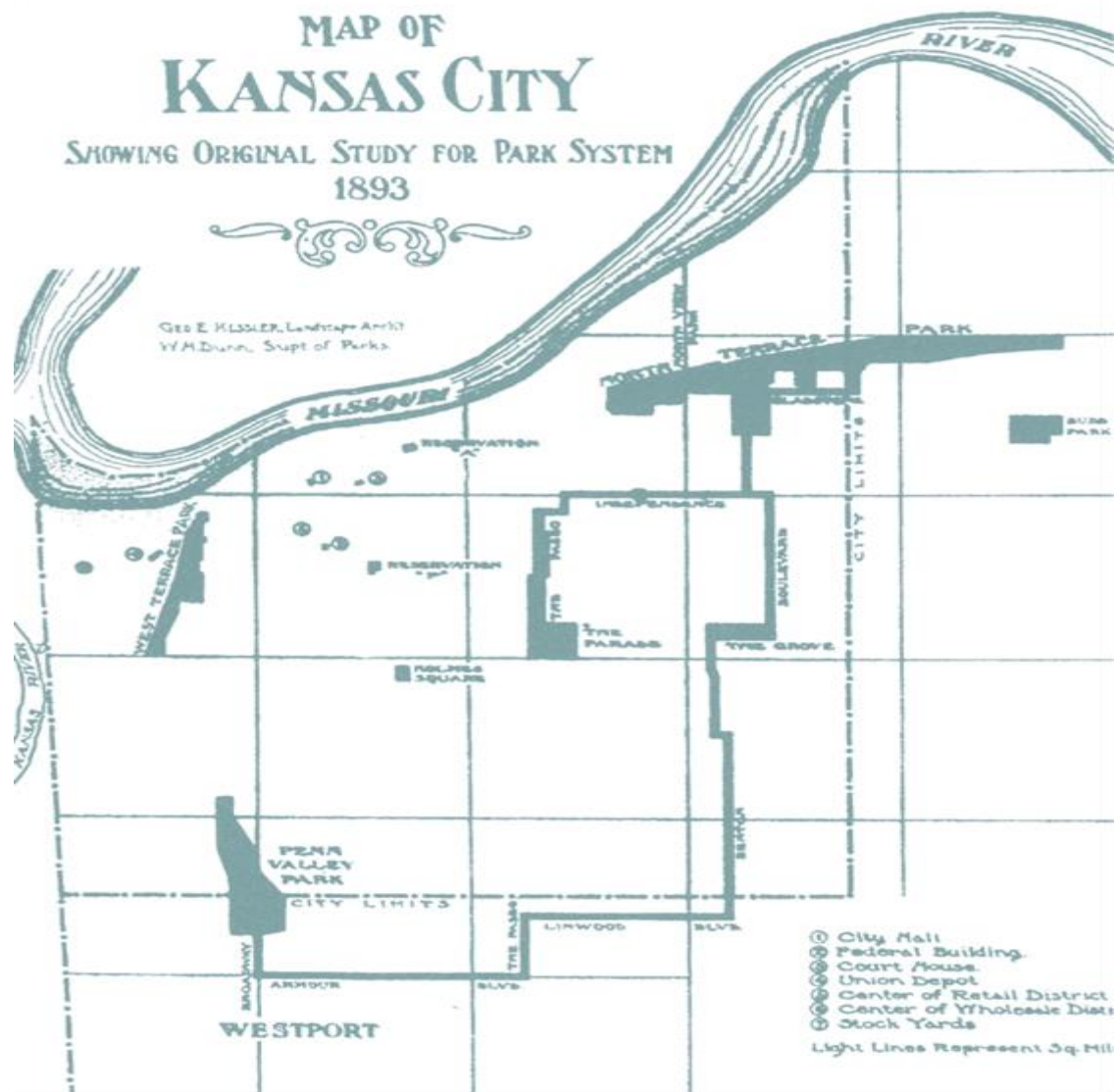
- **The Downtown Today**
 - Mixed-Use Districts with Re-purposed and New Buildings
 - River Market
 - Historic Central Business District
 - Power + Light
 - Crossroads
- **What is Missing?**
 - Open Spaces
 - Playgrounds
 - Parks



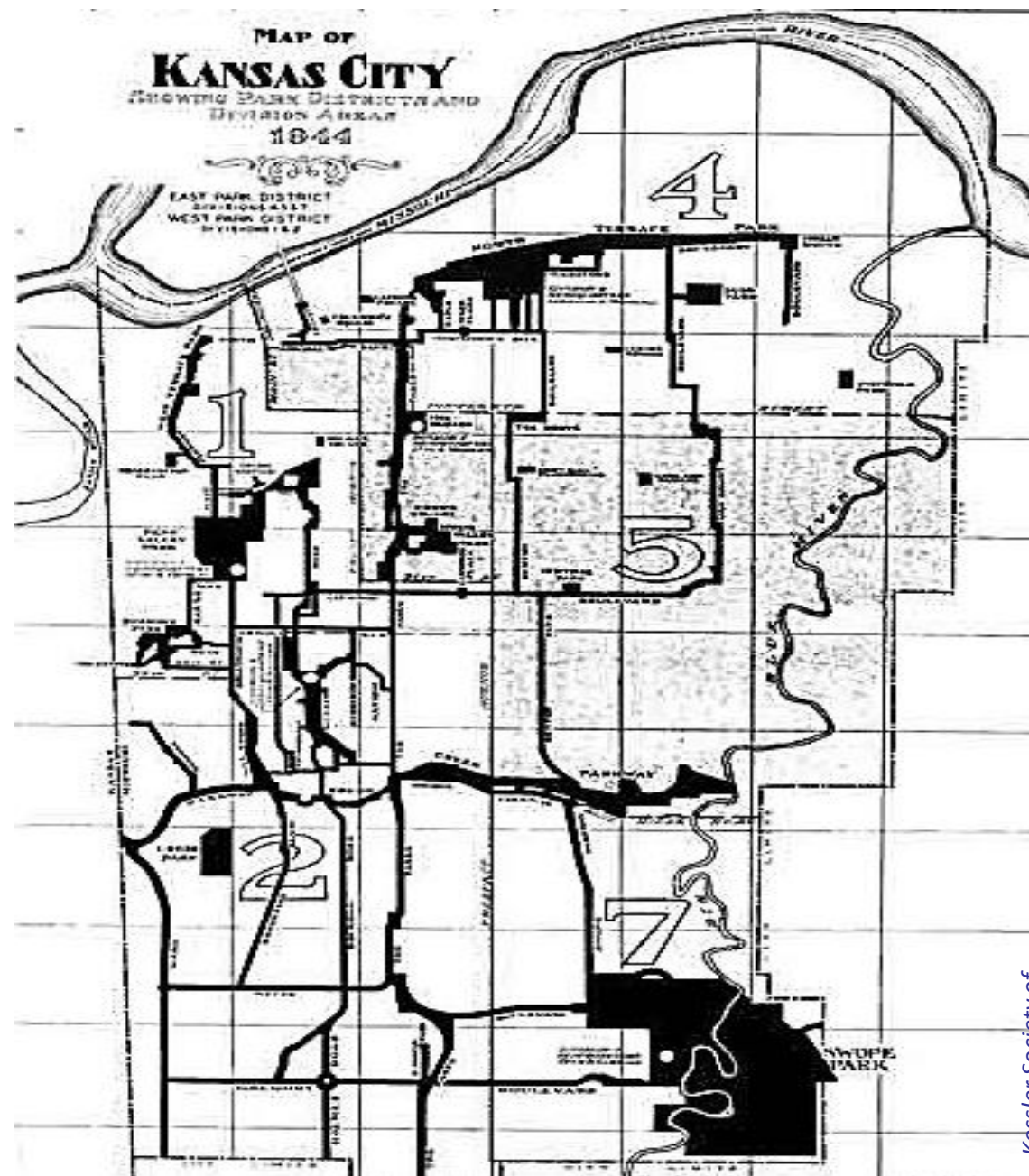
Planning

- **Critical Issues for Consideration**
 - Does the North Loop project have wide support? Is it a priority project?
 - What would prevent this project from happening?
- **What are Positives | Negatives?**
 - Benefits v Costs
 - Trade-offs between place making (i.e. open spaces) and land development
 - Impacts on neighborhoods
 - Public and/or private funding to ensure success

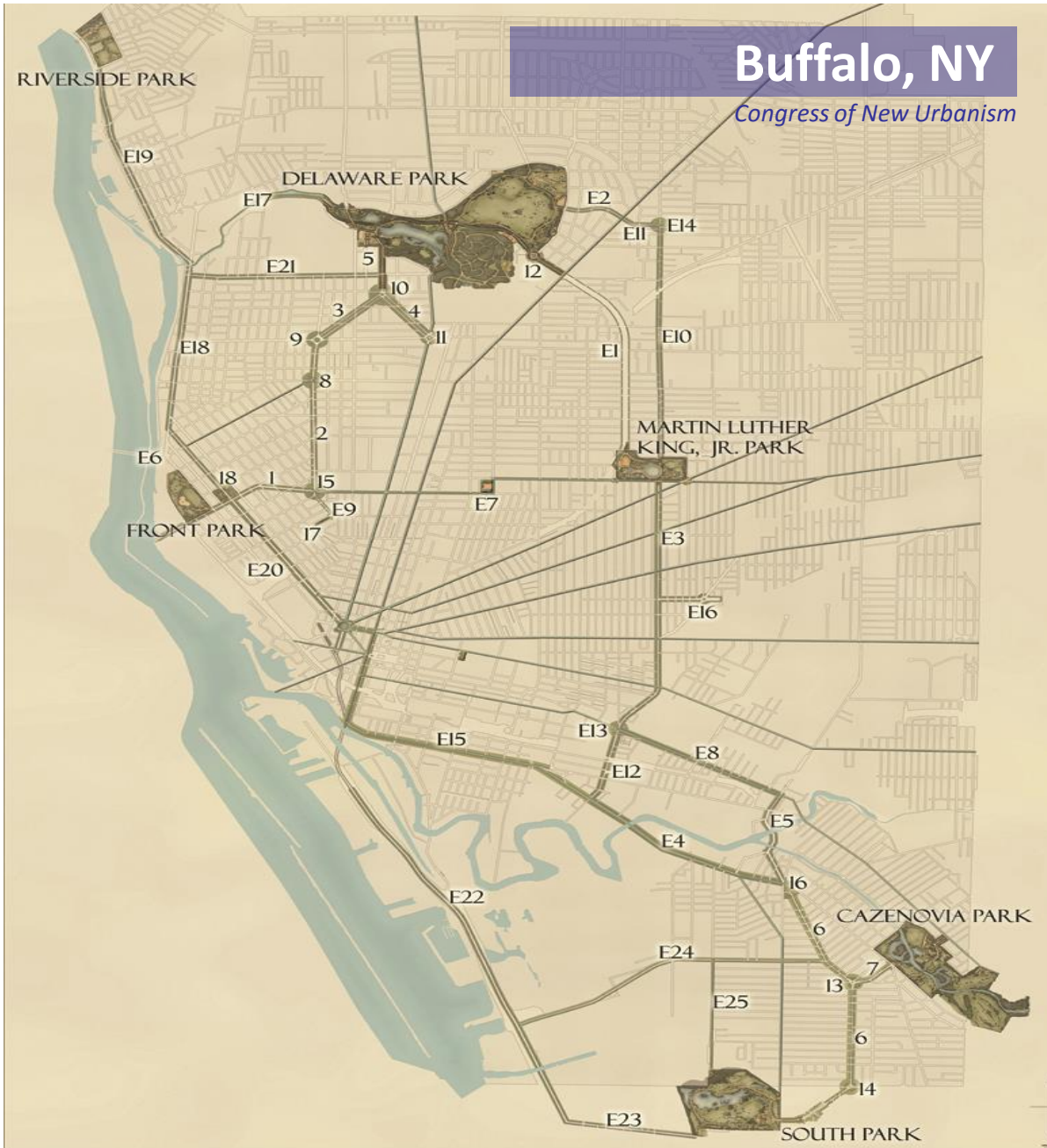


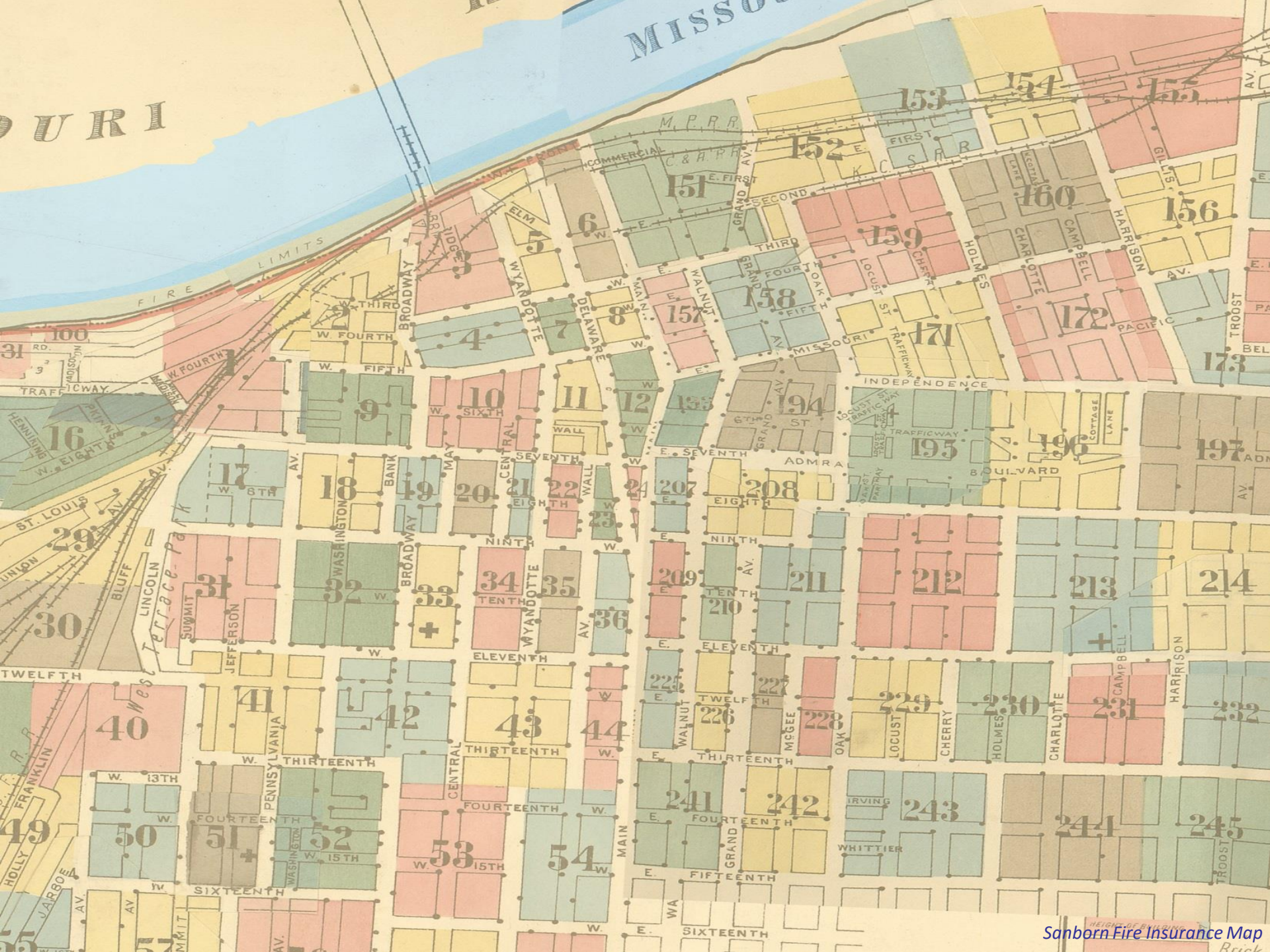


Kessler Society of Kansas City

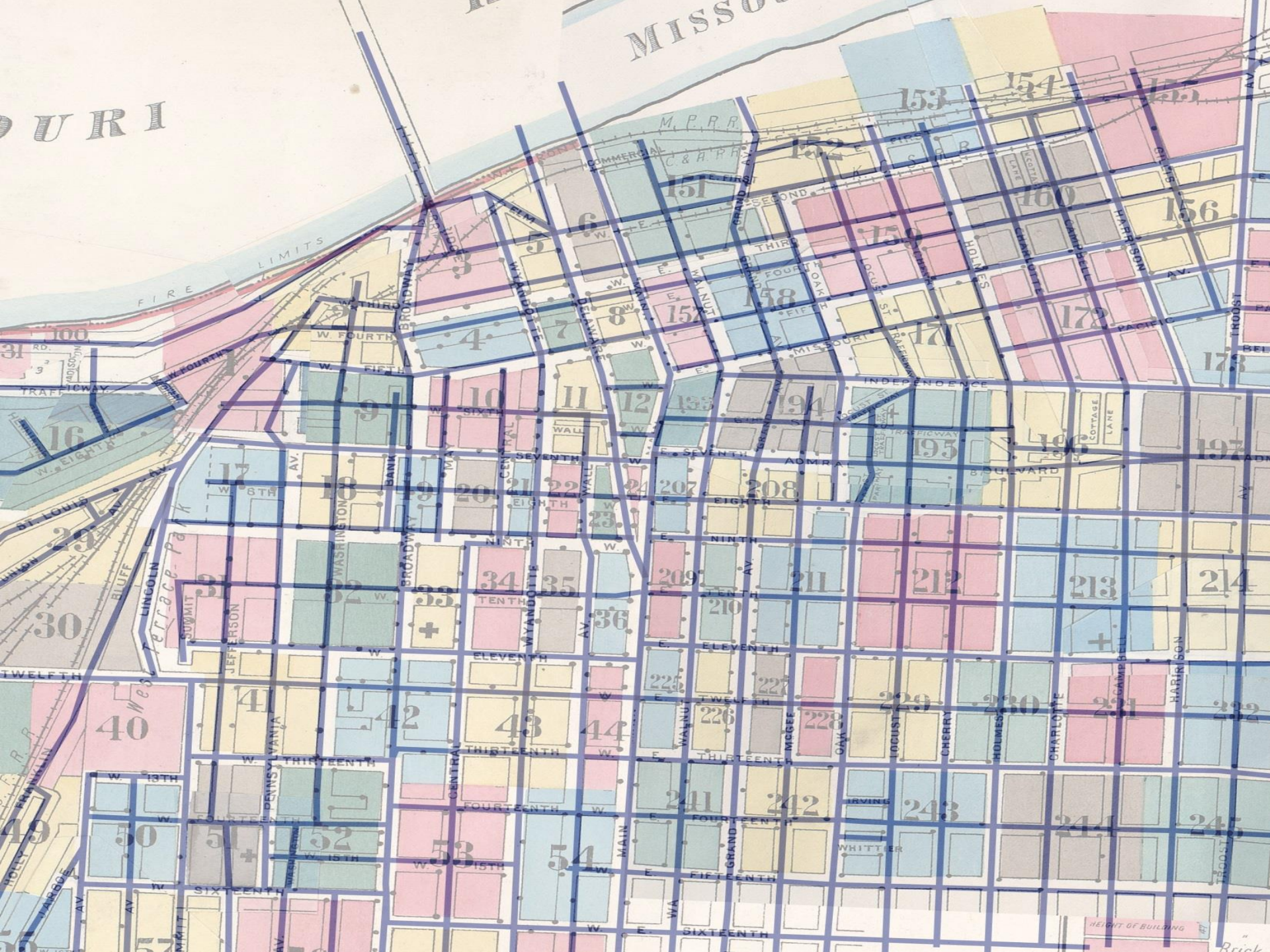


Kessler Society of
Kansas City





1939
Sanborn Fire
Insurance Map
of Downtown
Kansas City



1939
Downtown
Kansas City
Street Network



200 100 0 200 400 600 800

CITY PLAN COMMISSION
KANSAS CITY MISSOURI
1946





**1939
Downtown
Kansas City
Street Network
With Interstate
Overlay**



1939
Downtown Areas
Impacted by the
Interstate



Klyde Warren Park | Dallas, TX



Park East Freeway | Milwaukee, WI



McKinley Boulevard | Milwaukee, WI

City of Milwaukee Planning Department



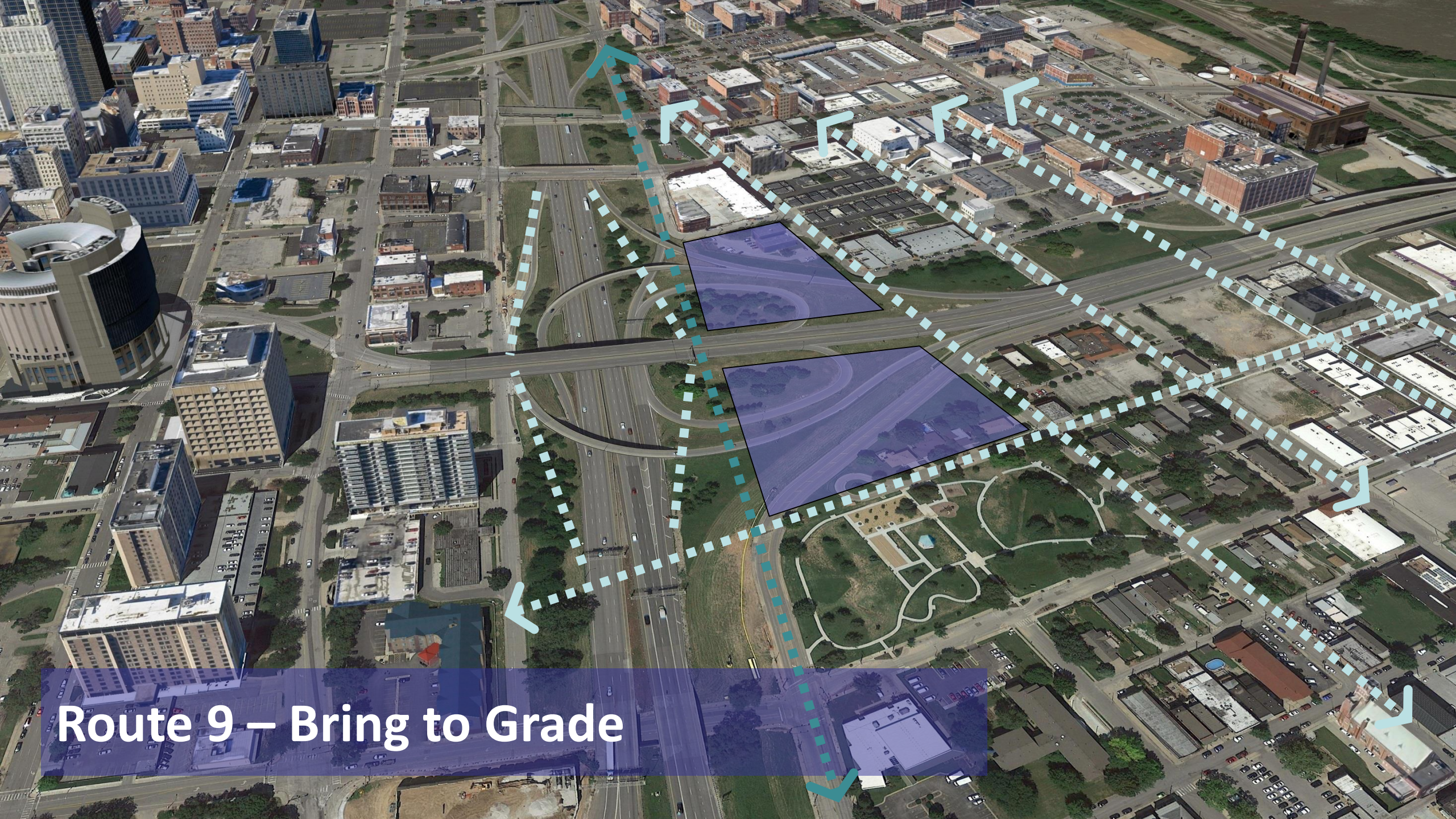
Central Freeway | San Francisco, CA



Octavia Boulevard | San Francisco, CA



Route 9 – Bring to Grade



Route 9 – Bring to Grade

Ward Parkway, KC

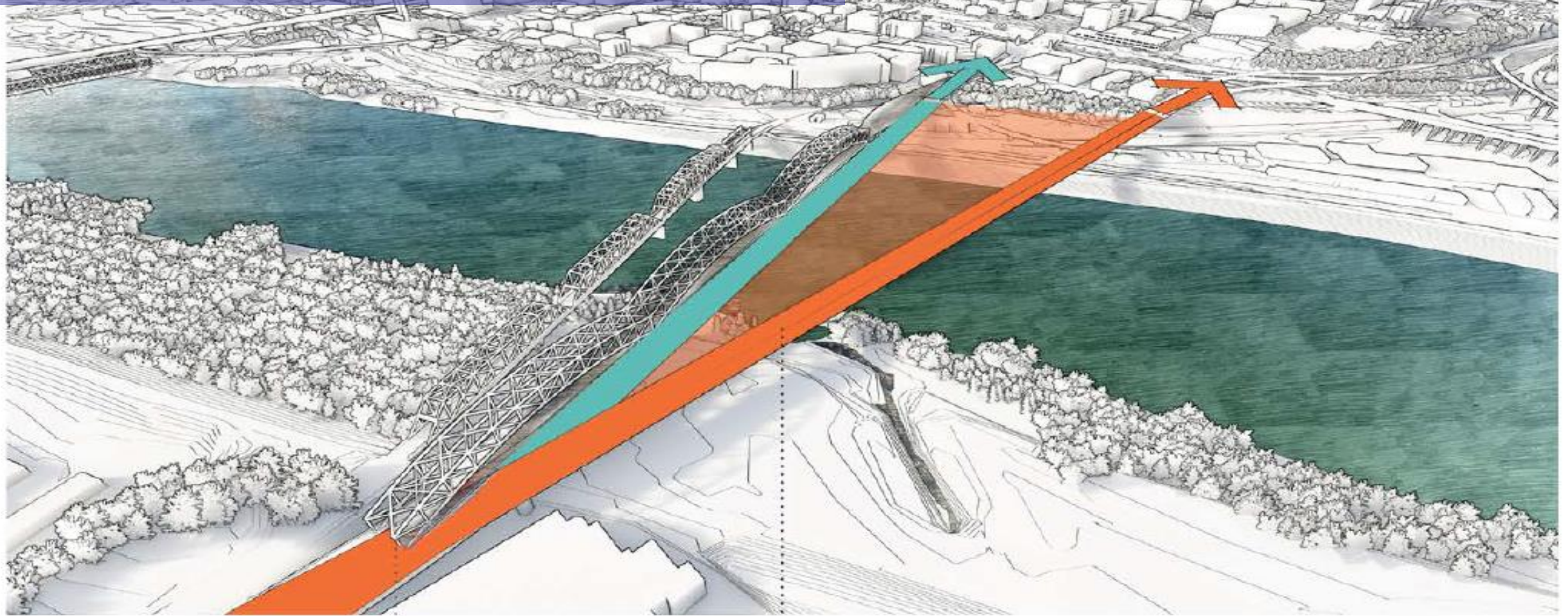
Kessler Society of Kansas City

ReStitch Independence Avenue

Queens Boulevard (Proposed) – Brooklyn, NY

John Massengale

Implement the O'Neil Bridge



NEW BRIDGE
CLOSER TO
DOWNTOWN



NEW BRIDGE
MORE DIRECT
TO I-35

Master Planning

Open Space System

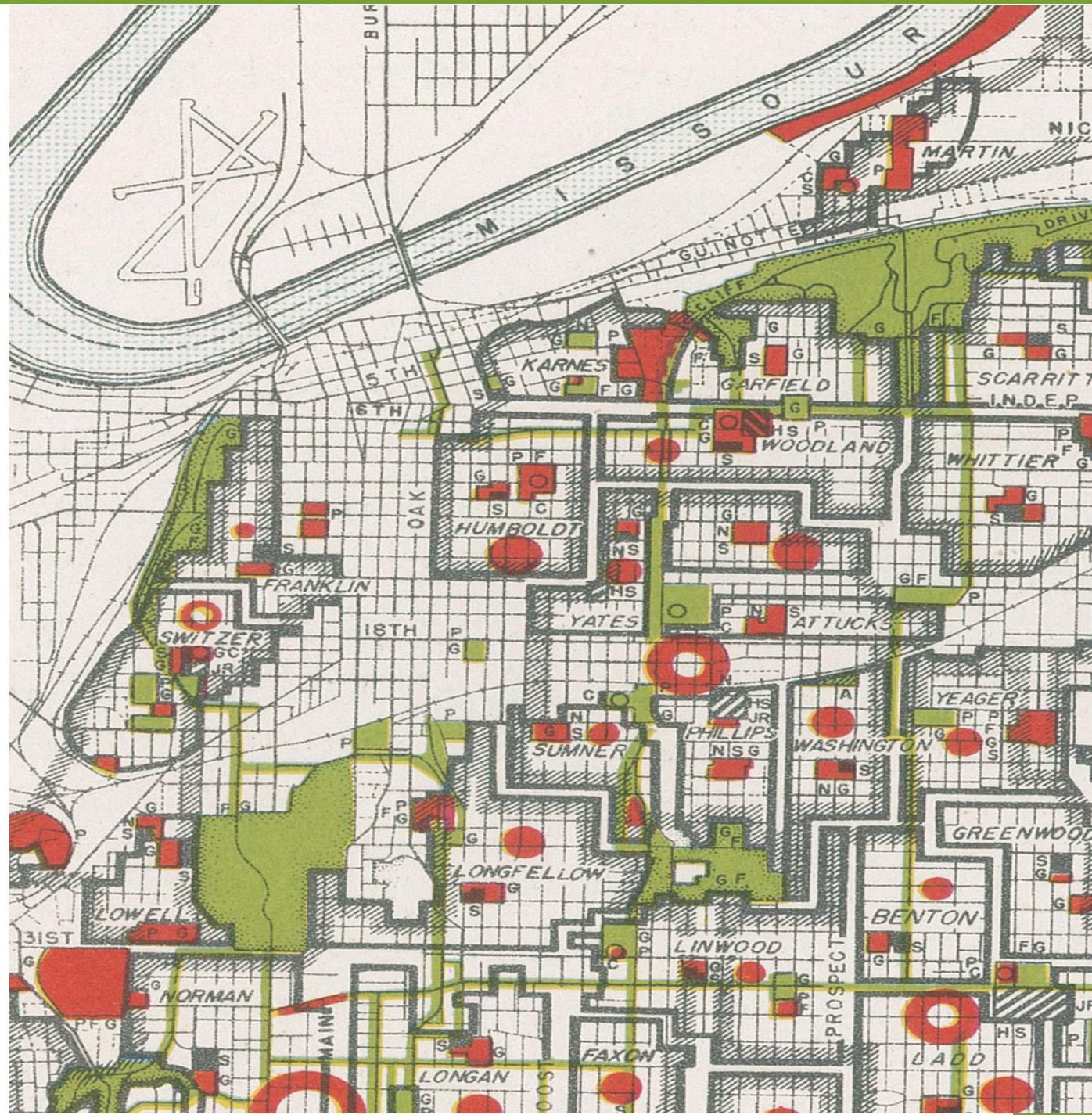
- Boulevards
- Urban Gathering Space
- Highly Programmed Spaces
- Passive Parks
- Connections to the River

Circulation / Complete Streets Strategy

- Pedestrian
- Bike
- Vehicular
- Streetcar
- MAX (BRT) and Bus

Land Use / Density

Green Infrastructure



Boulevards



Urban Gathering Spaces



Programmed Spaces

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Passive Parks



Connections to the River



Pedestrian Comfort



Safe Bicycle Routes

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Vehicular Circulation



Streetcar Expansion

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MAX BRT



Land Use / Density

Kansas City North Loop
September 17 - 22, 2017



Green Infrastructure

Kansas City North Loop
September 17 - 22, 2017



Downtown / River Market

Open Space Network
Boulevards / Green Streets
Hierarchy of Thoroughfares
Gateway Locations
Development Parcels



North Loop Redevelopment

Road Typologies

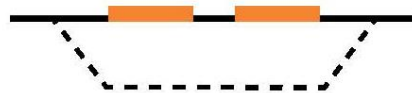
1. Cap Highway



2. Surface Street



3. Boulevard



4. Full Removal



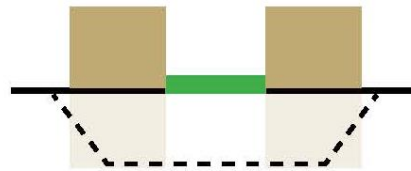
North Loop Redevelopment

Development Typologies

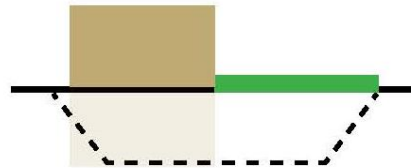
A. Park + Open Space



B. Double Loaded Development



C. Single Loaded Development



D. Anchor Development

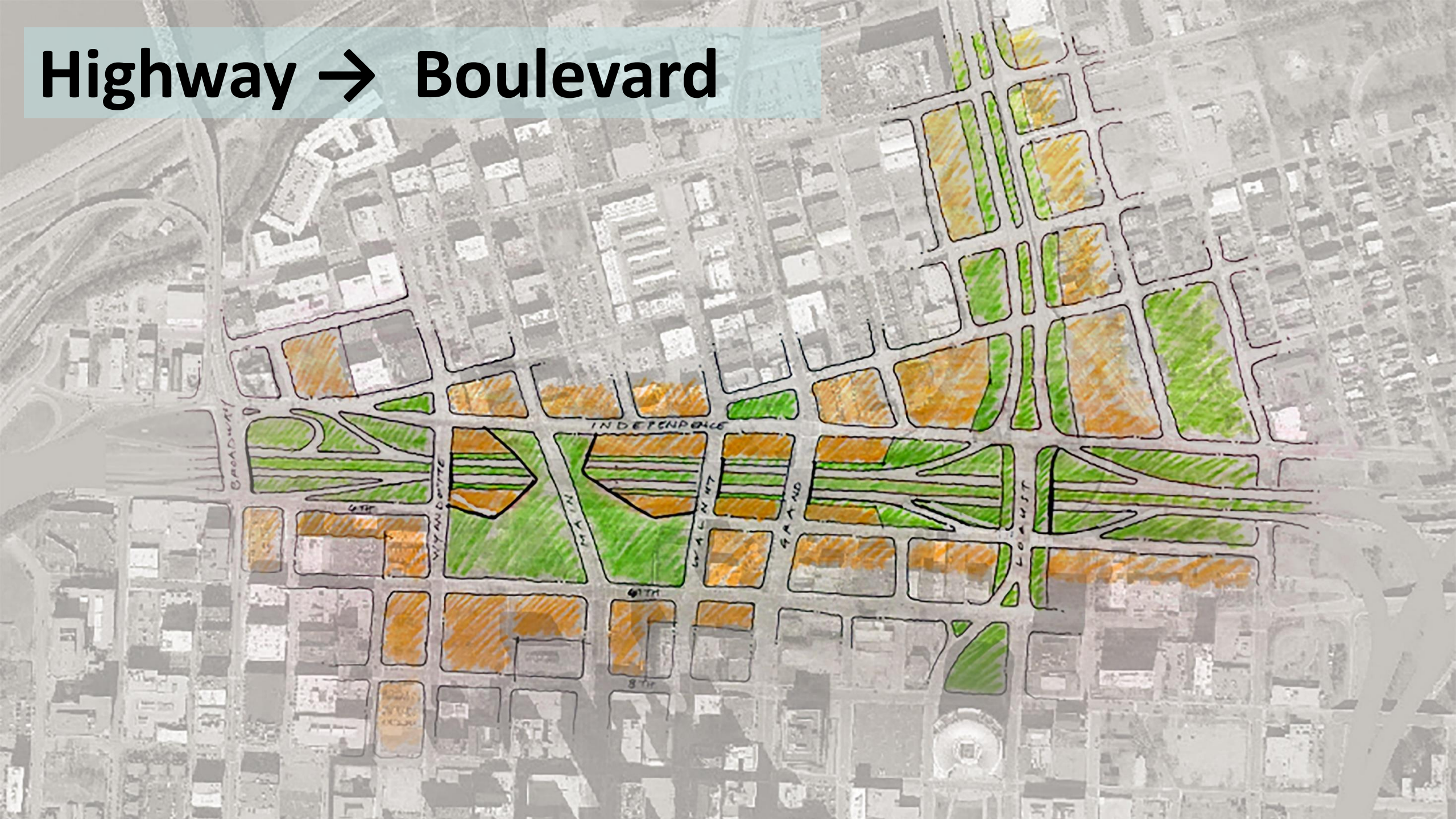


Highway to Boulevard Conversion

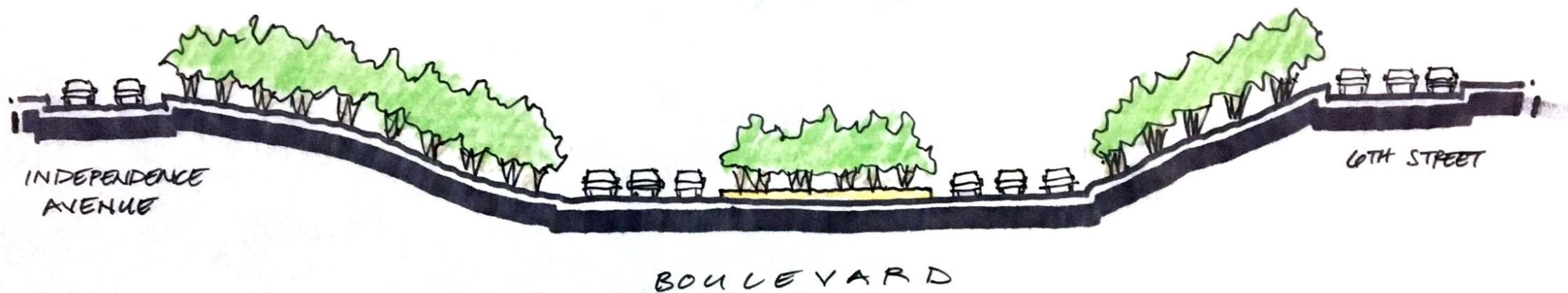
Kansas City North Loop
September 17 - 22, 2017



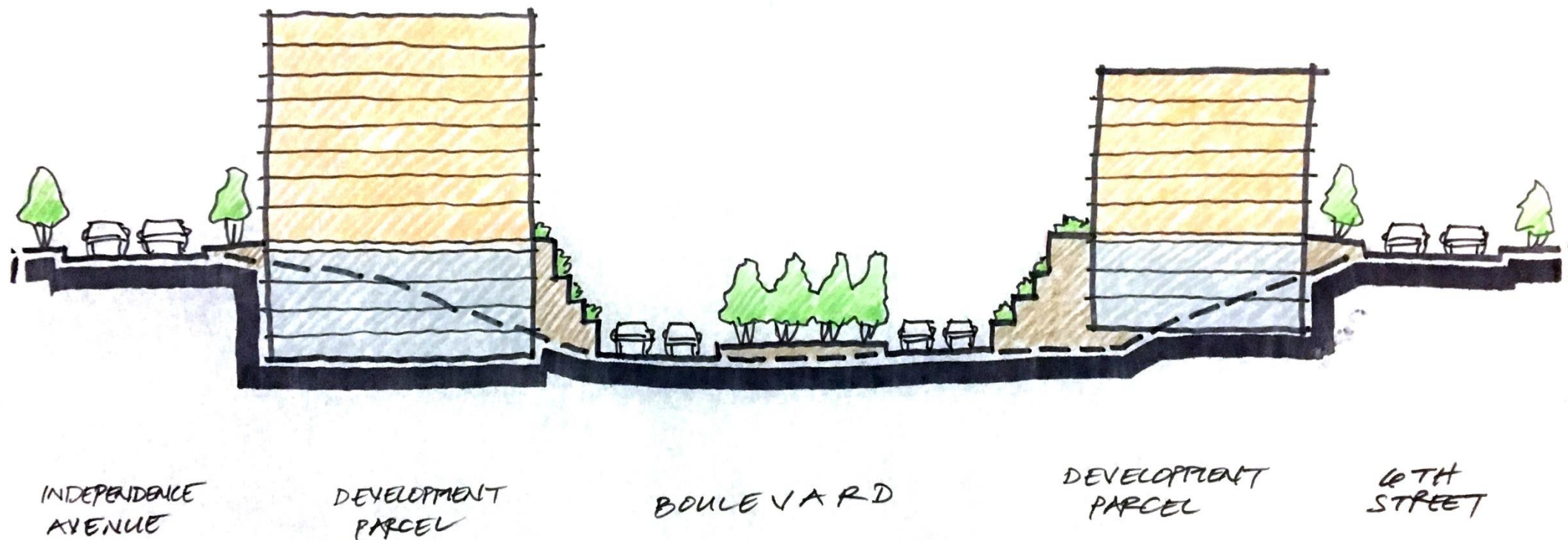
Highway → Boulevard



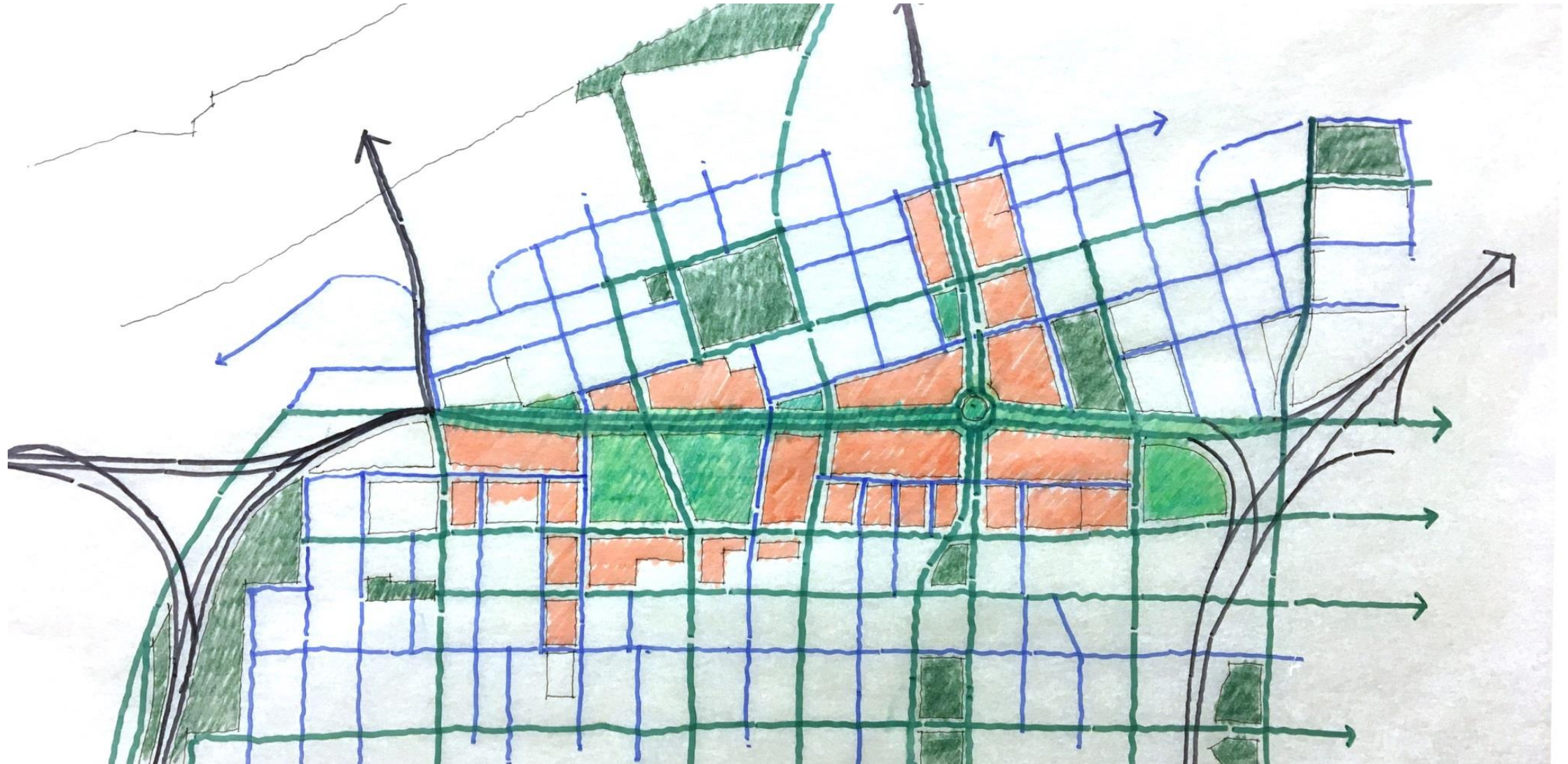
Highway to Boulevard Conversion



Highway to Boulevard Conversion

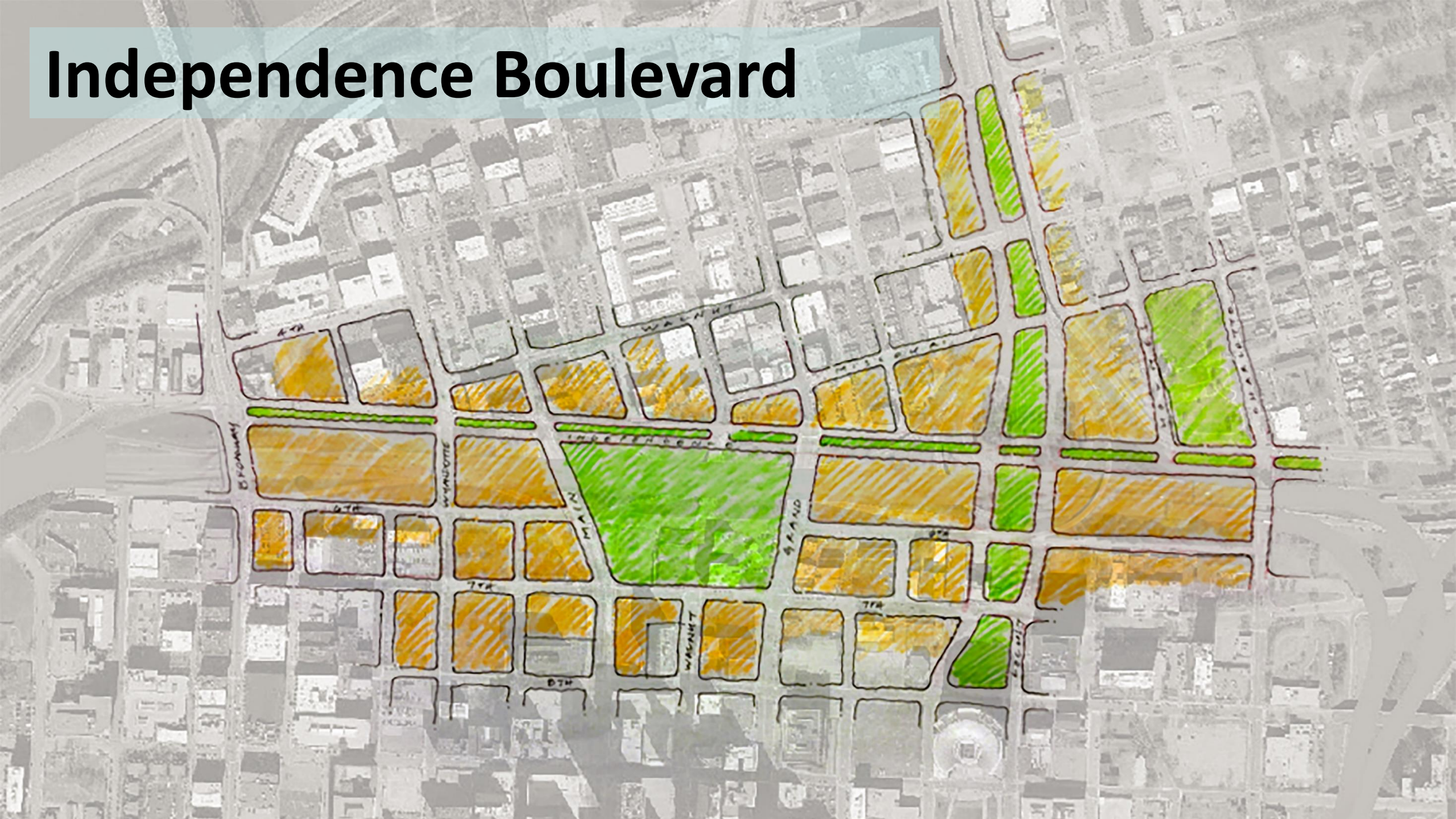


Independence Avenue to Boulevard



Kansas City North Loop
September 17 - 22, 2017

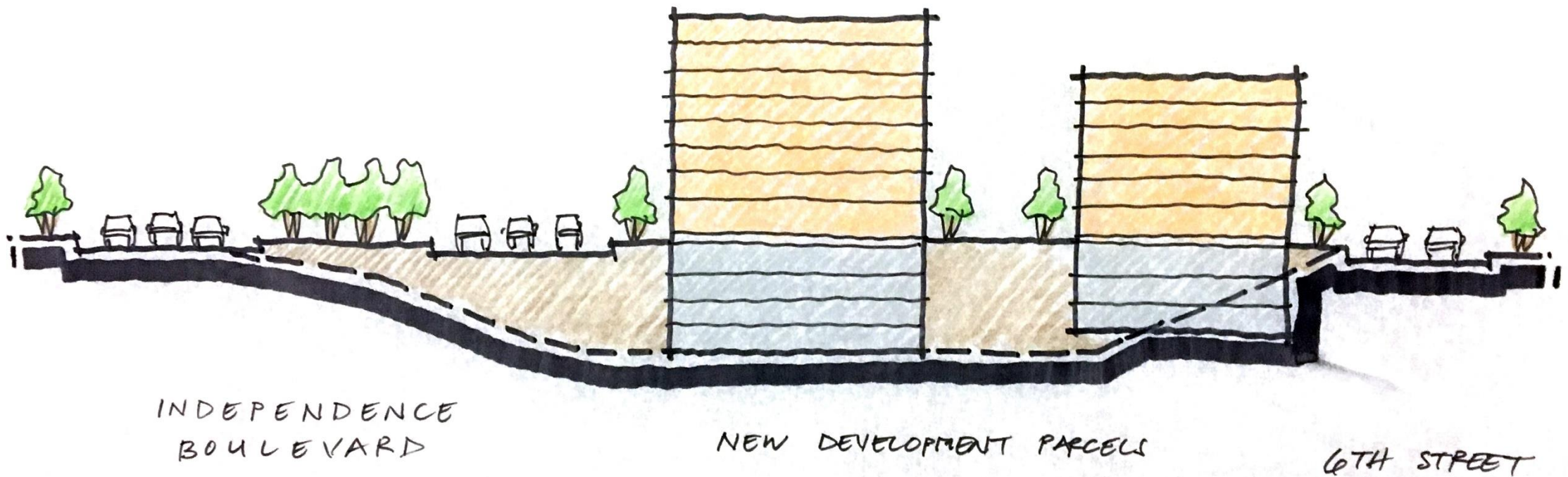
Independence Boulevard



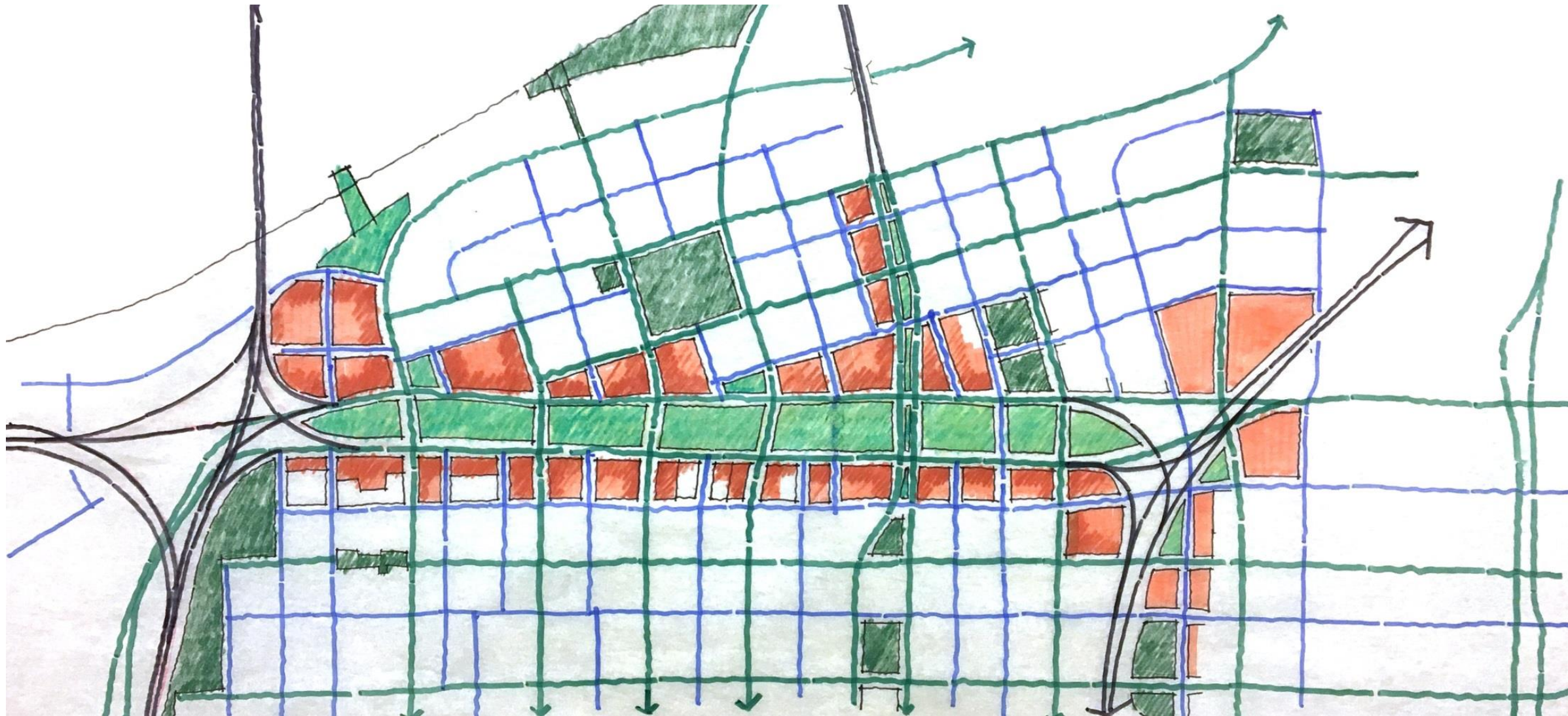
Independence Boulevard



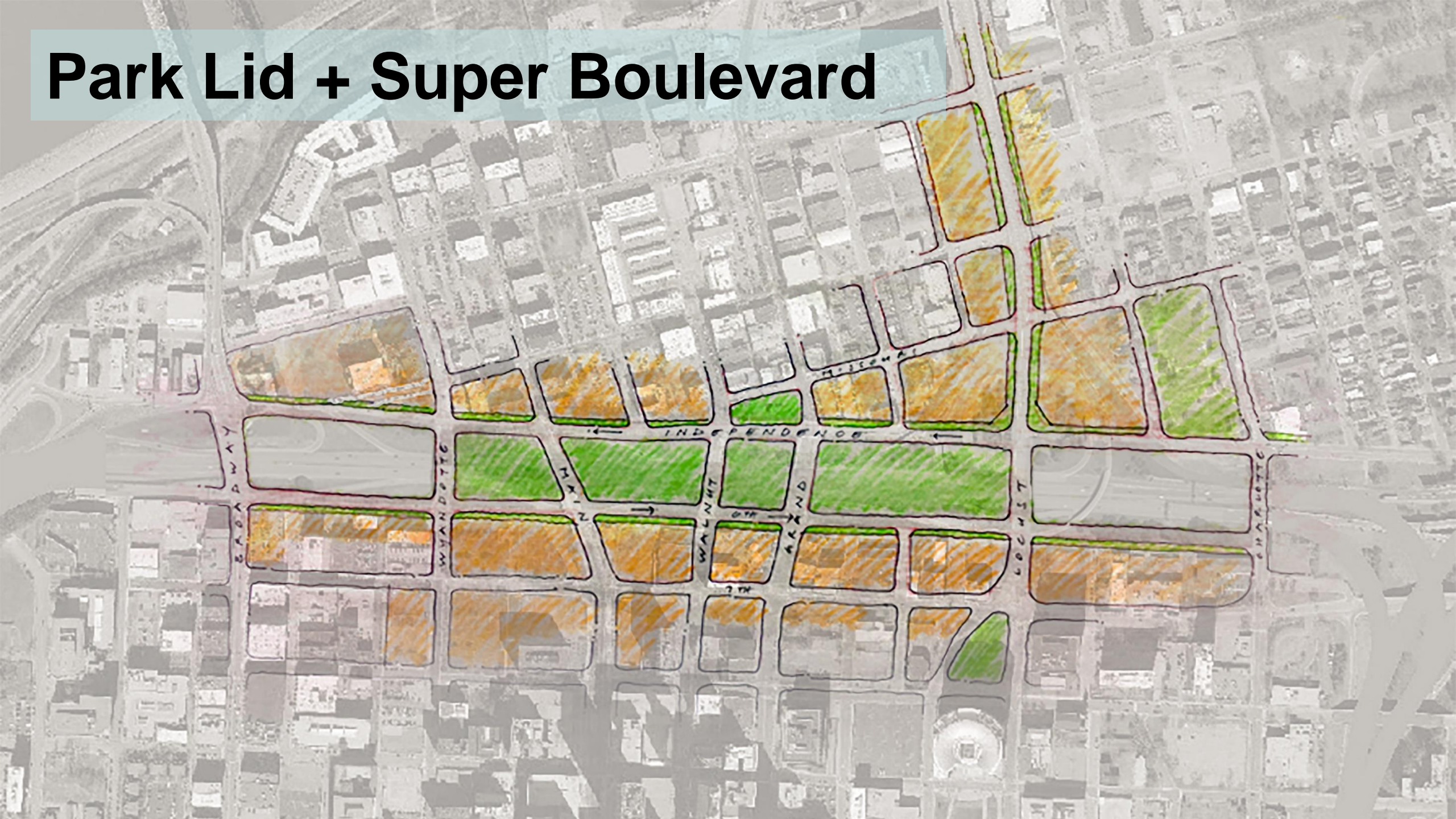
Independence Boulevard



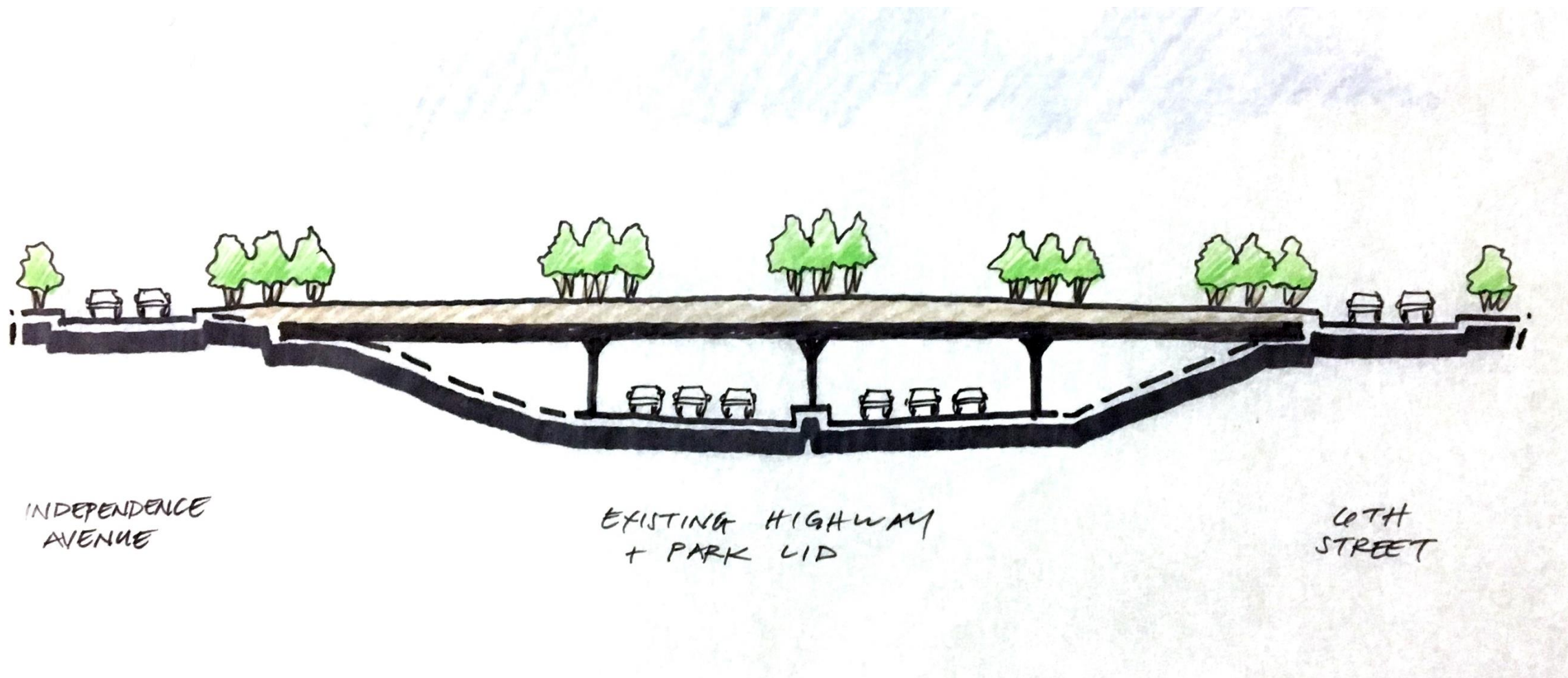
Park Lid + Super Boulevard



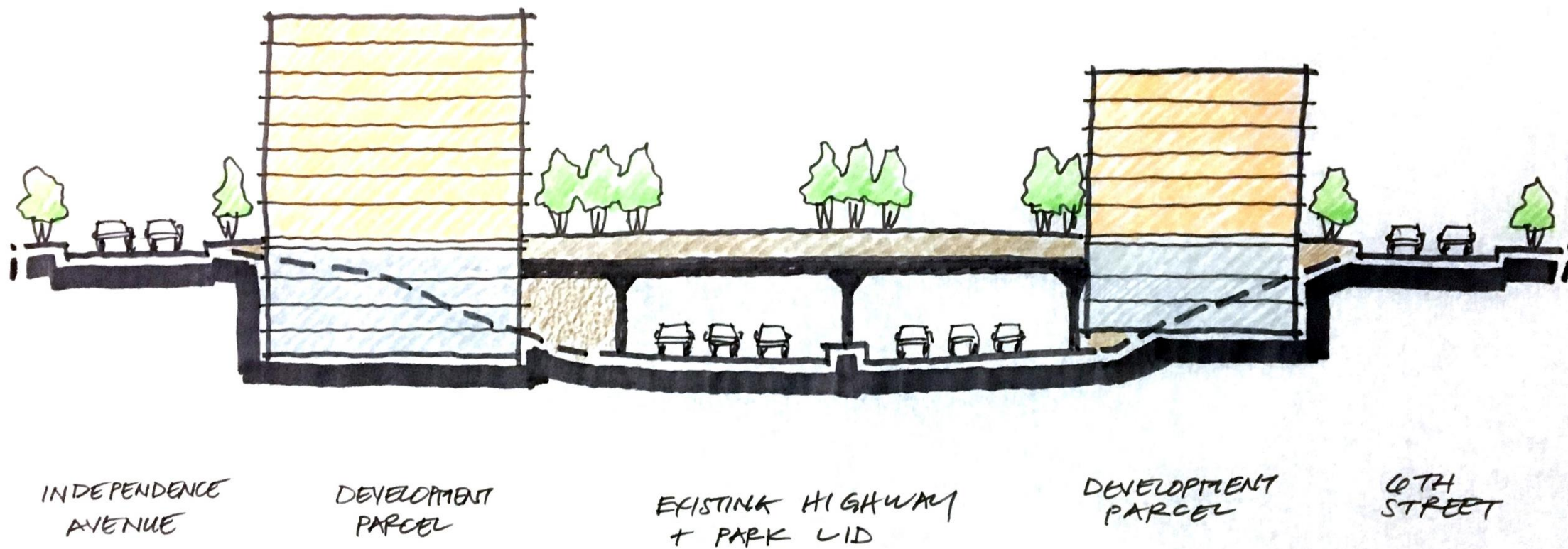
Park Lid + Super Boulevard



Existing Highway + Park Lid



Existing Highway + Park Lid

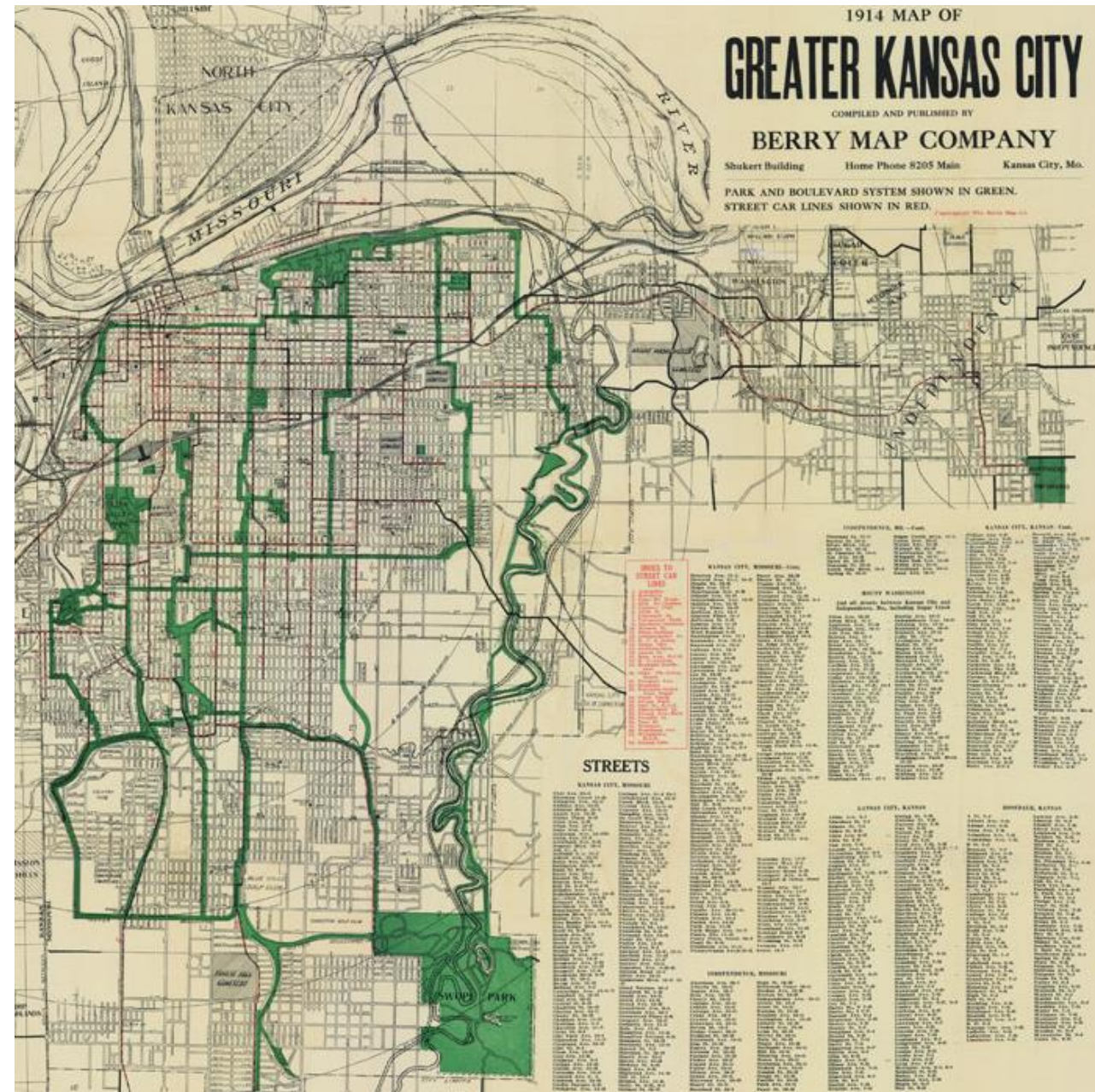


Central Park



Next Steps

Create a Unified Vision
Broad-Based Support
Prepare a Master Plan
Buck O'Neil Bridge
Highway 9 to Grade
Independence Avenue
North Loop Study

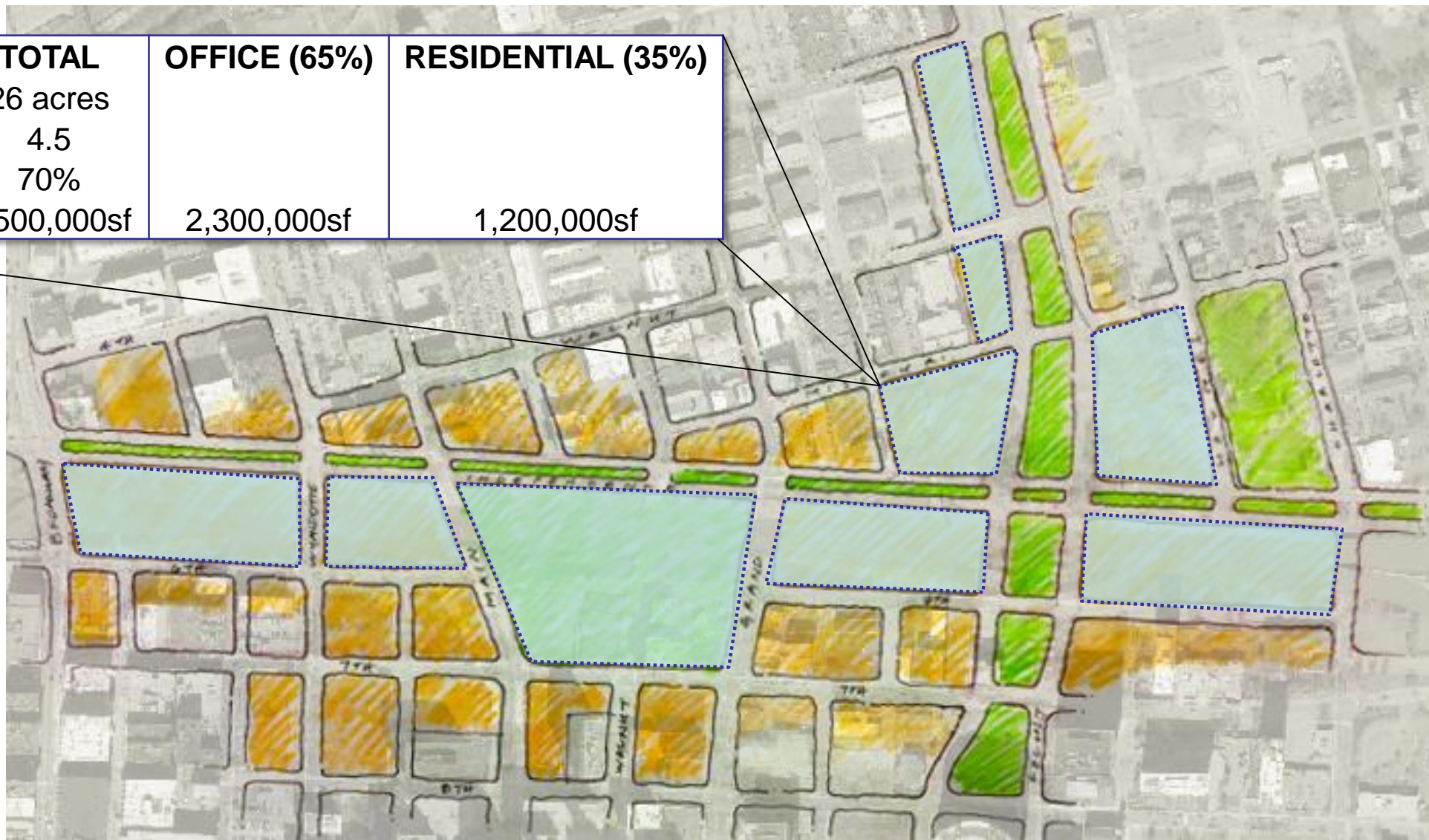


Presentation Overview

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Turning Land Into Density

	TOTAL	OFFICE (65%)	RESIDENTIAL (35%)
Land area	26 acres		
FAR	4.5		
Lot Coverage	70%		
Density	3,500,000sf	2,300,000sf	1,200,000sf



How Do You Value The Density?

KEY QUESTIONS

- How much will the market pay for this land?
- How much will it cost to build this land?
- Are there other options nearby?

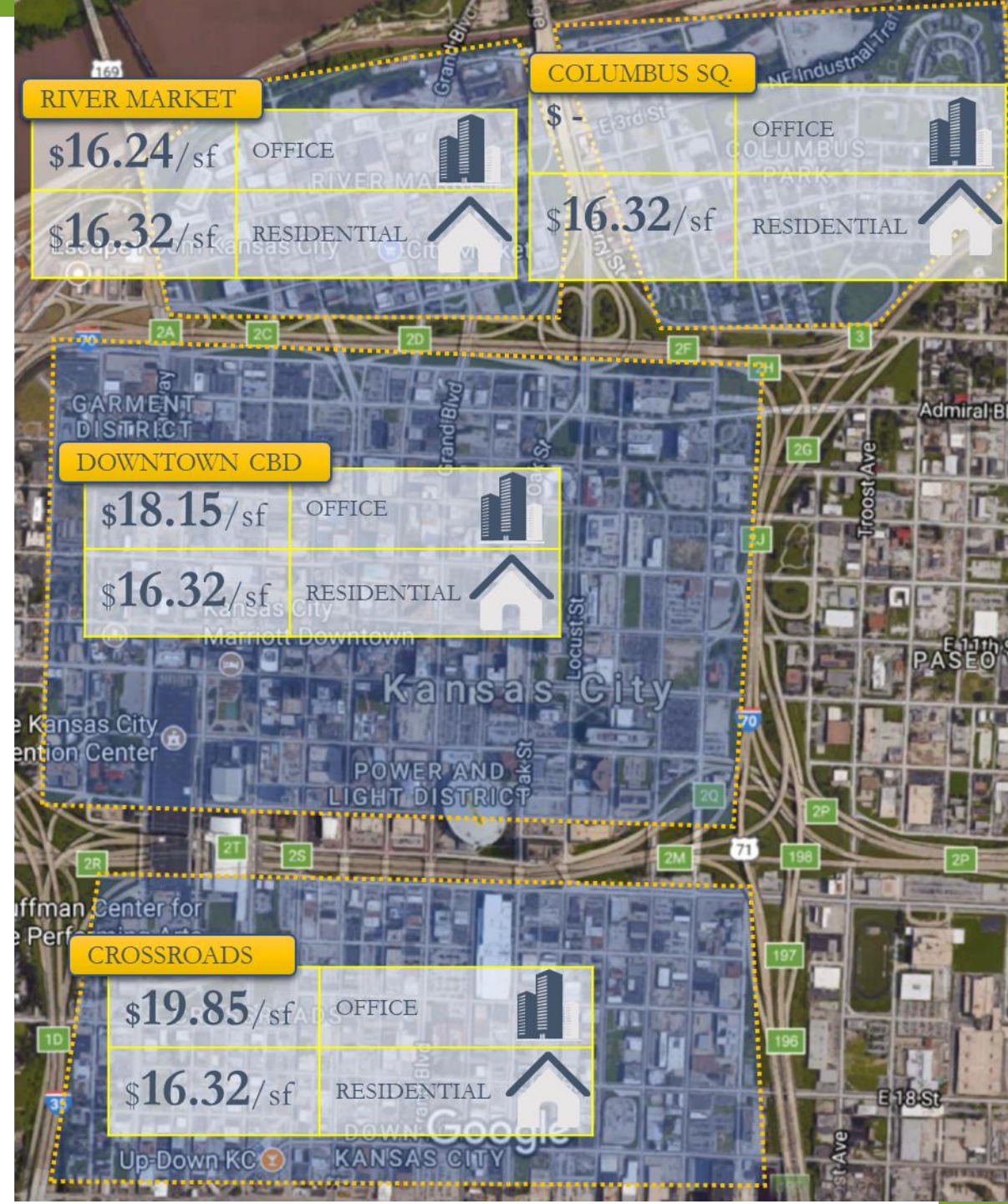


RESIDUAL LAND VALUE	
	TOTAL VALUE
-	COST TO BUILD
-	REASONABLE PROFIT
	RESIDUAL VALUE

Market Factors

KEY INPUTS UTILIZED

- Average Rents
- Building Cost
- Sale Transactions

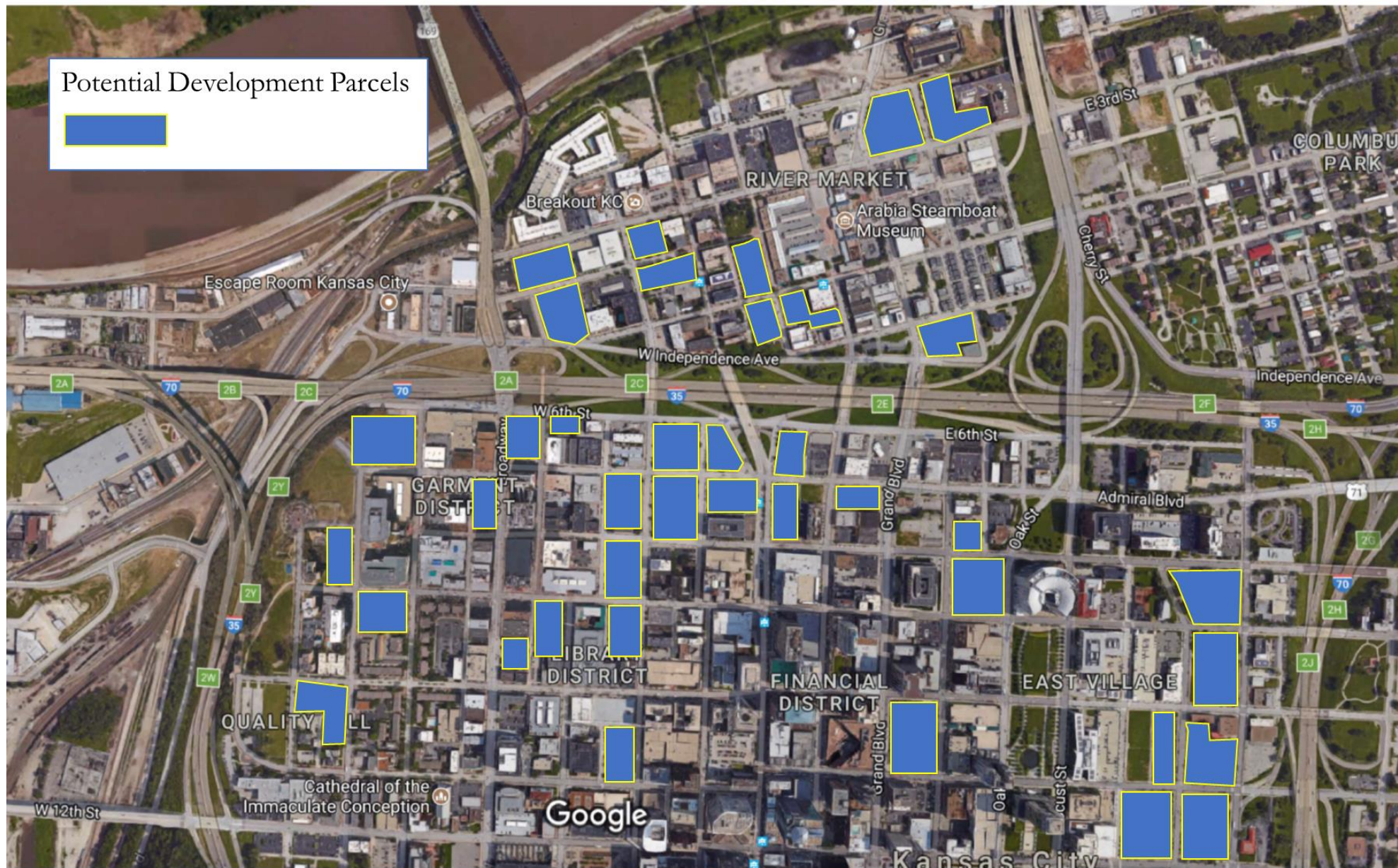


Residual Land Values

OFFICE		
NOI:	\$11.23	\$7,012,040
Exit Cap Rate		6.50%
Required Spread		2.50%
Residual YOC		9.00%
TOTAL PROJECT VALUE		\$77,911,558
TOTAL DEVELOPMENT COSTS		\$142,379,849
Residual Land Value	\$(1,074.47)	(\$64,468,291)

RESIDENTIAL		
NOI:	\$11.63	\$1,482,570
Exit Cap Rate		6.25%
Required Spread		2.50%
Residual YOC		8.75%
TOTAL PROJECT VALUE		\$16,943,657
TOTAL DEVELOPMENT COSTS		\$24,454,710
Residual Land Value	\$ (250.37)	(\$7,511,053)

Adjacent Development Parcels

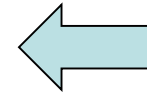


Value Comparison

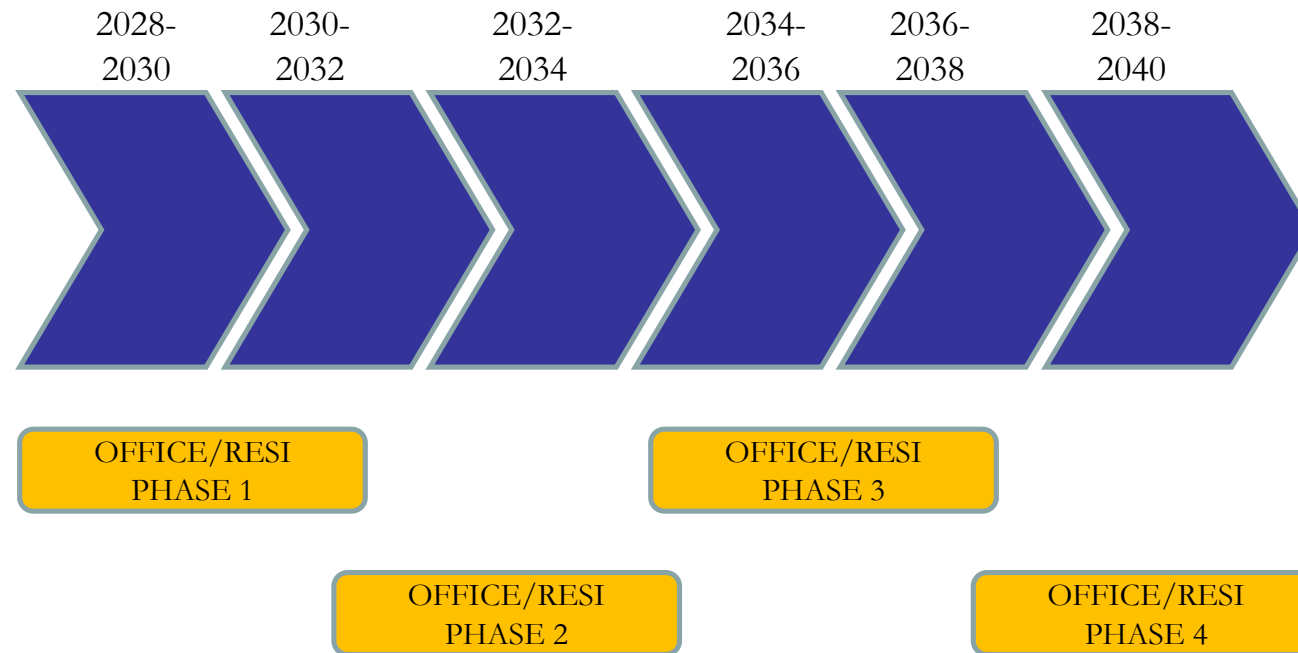
	OFFICE	RESIDENTIAL
North Loop Land Value	(\$1,075)/sf	(\$250)/sf
Cost to Build North Loop Land	(\$75)/sf – (\$150)/sf	(\$75)/sf – (\$150)/sf
Alternative Development Land Value	\$8/sf - \$50/sf	\$8/sf - \$50/sf

How Long Until You Build?

	OFFICE	RESIDENTIAL
Break-Even Rent	\$38.40/sf	\$2.50sf/mo
Break-Even Year	2028	2031



These are the rents that would achieve \$0/sf residual land value



Conclusion

- The market says don't develop North Loop sites today
- If you build it later, the market says **2028** is the time
- Subsidies could change that answer
- The City should prioritize its investments

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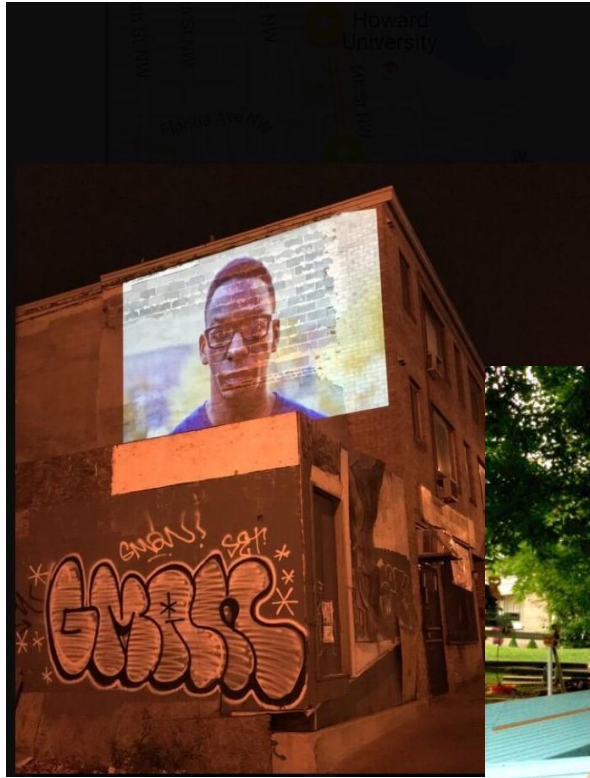
Implementation

- Knit fabric of the city together
- Growing sustainable economies require equitable participation
- Reorient strategy around greatest asset: People
- Eliminate barriers



Implementation

- Engage in Social Placemaking



Implementation

- Equity leadership
- Celebrate & empower neighborhoods



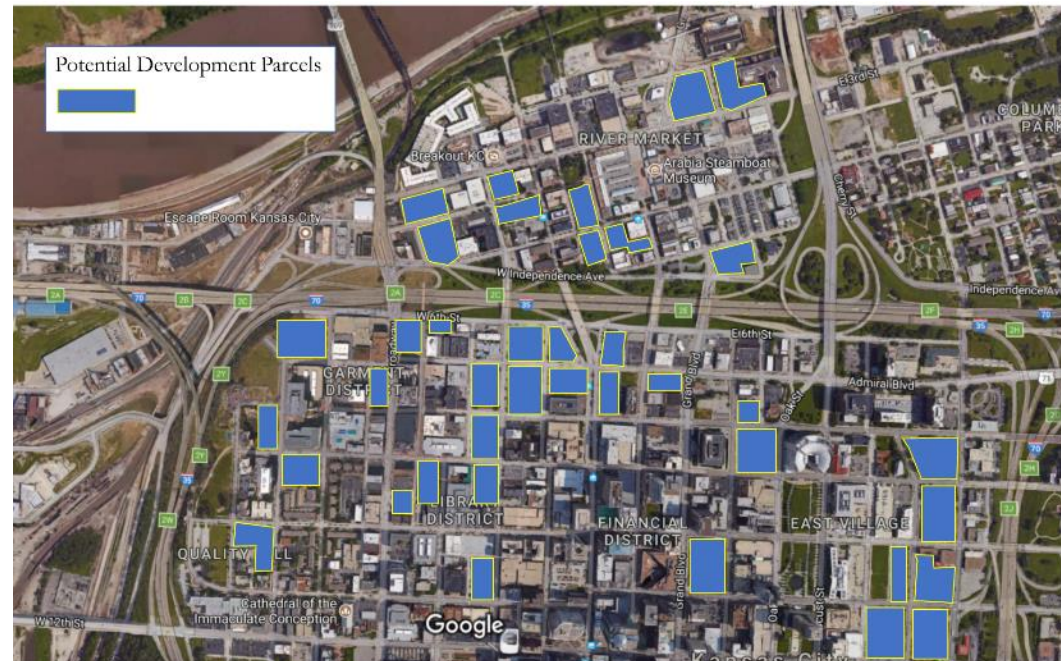
Implementation

- Leverage people resources
- Attract, retain young people
- Education commitment
- Workforce development
- Other employment opps



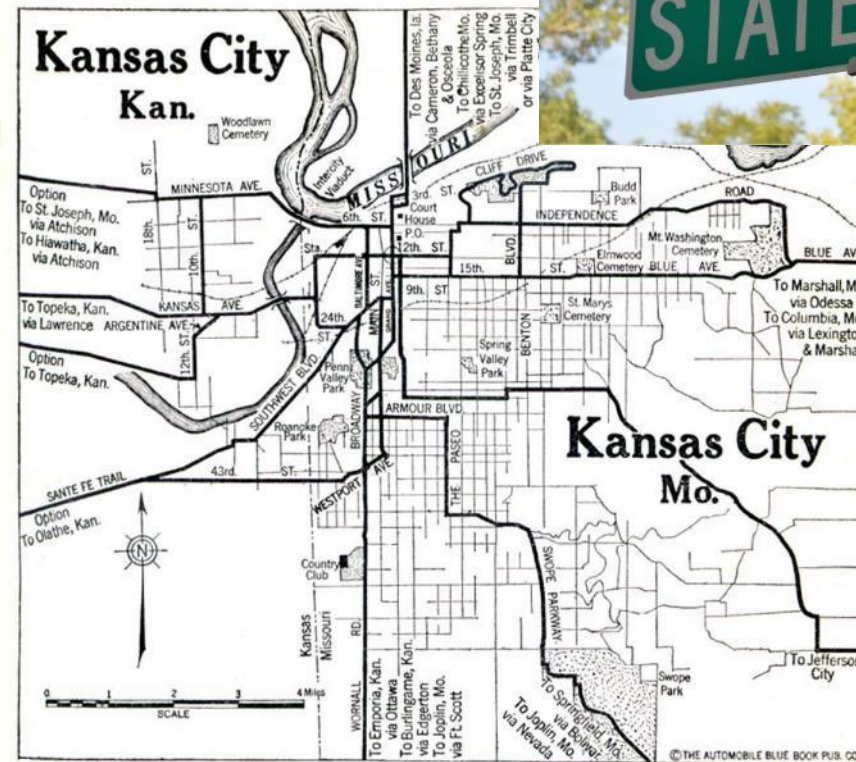
Implementation

- Development doesn't build an economy in isolation
- Master Plan
- Out of the box civic engagement
- Create Pad-ready development sites in downtown



Implementation

- Implementation
- Business relocation strategy
- Benefits of regionalism



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Summary of Major Recommendations

- Downtown Master Plan
- Creative Outreach Strategies/Bring in Your Community Partners
- Leverage Education Programs Momentum
- Regional Cooperation: It's not a choice, it is a necessity
- Streetcar Expansion
- Focus on Downtown Infill as Short Term/Immediate Development
- Bring Missouri Route 9 Back to Grade
- Reconnect Independence Avenue
- North Loop vision is possible, **but not today**. Should be part of a large strategic visioning exercise for the City.

What Do You Do Next

3 Physical Things

- Bring Missouri Route 9 Back to Grade
 - Reconnect Independence Avenue
 - Rebuild or Replace Buck O'Neil Bridge
- Prepare RFQ/RFP for Master Plan
- Explore and Practice Social Placemaking Programs

All Great Changes Are Preceded By Chaos



Kansas City North Loop
September 17 - 22, 2017



Urban Land
Institute

Advisory Services Program

Questions?

I WISH THIS WAS
a branch

I WISH THIS WAS
A GREEN AREA
OR DOG PARK

I WISH THIS WAS
A DONUT/
Flower Shop!

I WISH THIS WAS
Owned by someone who cared

I WISH THIS
an official haunted

I WISH THIS WAS
a temple

I WISH THIS WAS
COMMUNITY
Resource center

I WISH THIS WAS
Brad Pitts House
😊

I WISH THIS WAS
A GROCERY

I WISH T
a hand

I WISH THIS WAS
a party

I WISH THIS WAS
A VINYL RECORD
STORE!

I WISH THIS WAS
A CHINESE RESTAURANT

I WISH THIS WAS
A Bike Shop

I WISH THIS
your dream

I WISH THIS WAS
a

I WISH THIS WAS
A COMMUNITY
GARDEN

I WISH THIS WAS
A PLACE TO SIT & TALK

I WISH THIS WAS
not lowering my
property value!

I WISH THIS V