



Reality Check 2050

Envisioning our region's growth

JUNE 4, 2013

CHARLOTTE CONVENTION CENTER
CHARLOTTE, NC



Vibrant Communities - Robust Region



Urban Land
Institute

Charlotte

“The Power of Regional Visioning” CONNECT Our Future

**Charlotte, North Carolina
June 4, 2013**

**Robert J. Grow
Envision Utah,
President & CEO
rgrow@envisionutah.org**

The process of
Regional Visioning
is a powerful tool to meet
difficult challenges and create
enduring communities and
regions

A Successful Vision:

- Is guided by a large, trusted, and diverse group of **Stakeholders**
- Relies on community **Values** to find common ground, communicate choices, and build consensus
- Uses **Scenarios** to engage the public, provide clear choices, and refine direction

**What are some of those
trends and challenges?**

Trend Impact?

What About Climate Change?



Positive proof of global warming.



**18th
Century**

1900

1950

1970

1980

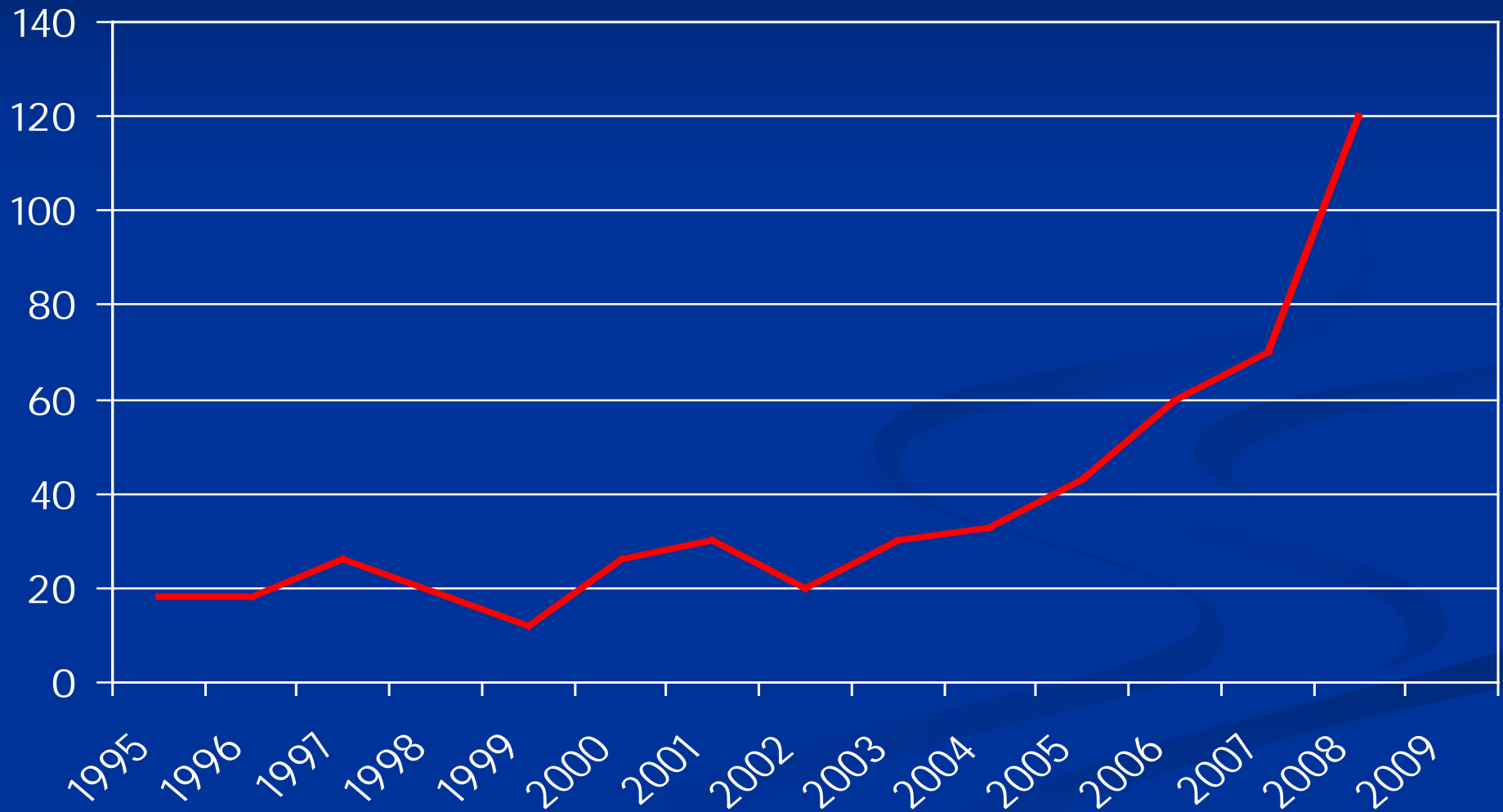
1990

2006

Trend Impact?

Skyrocketing Energy Costs

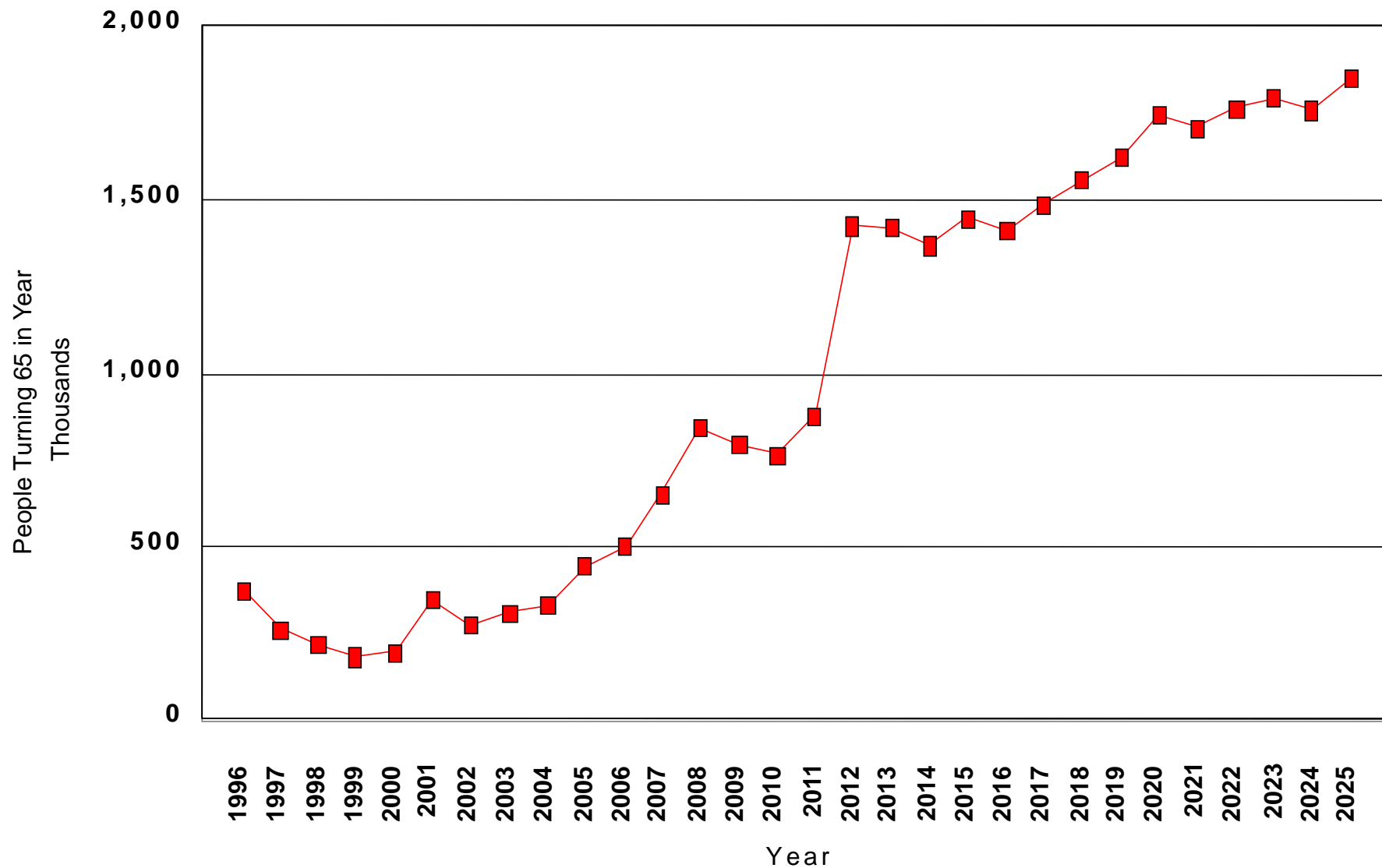
Oil prices continue to rise



Trend Impact?

**Aging Population and
Declining Household
Size**

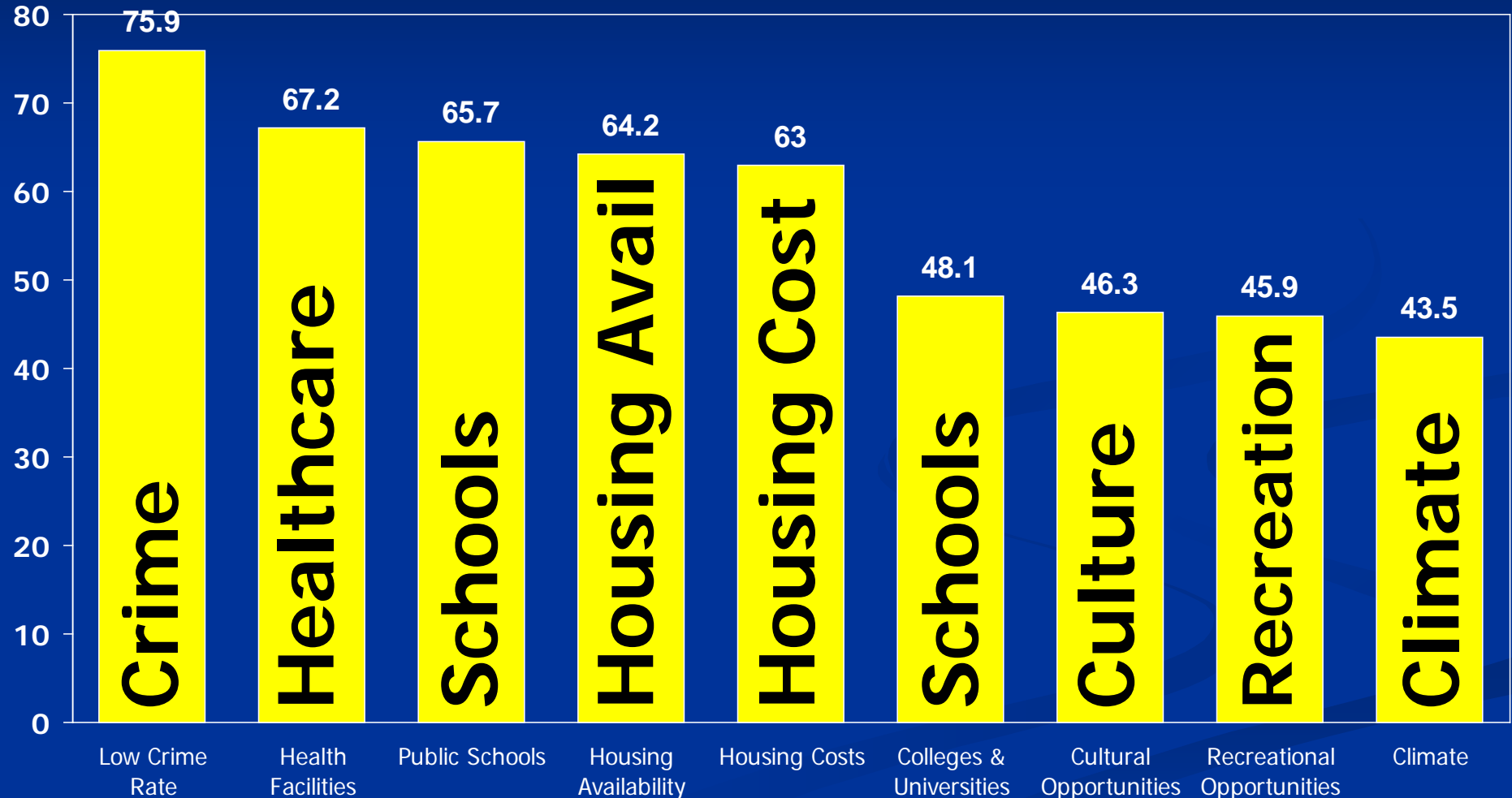
People Turning 65 Annually 1996-2025



Trend Impact?

Deep recession, job loss,
difficulty attracting good
jobs to the region

Economic Development Driver: Quality of Life



The Emergence of Megapolitans or Supercities

Business 2.0 November 2005

Megapolitan Area Centerfold

CASCADIA

Just quakes of cheap, prime greenfield surrounding Seattle, Portland, and Eugene give the Northwest megapolitan explosive growth potential. By 2030 the three metro regions will be intertwined.

NEW PEOPLE: 2.2M (+38%)
NEW JOBS: 800,000 (+25%)
NEW HOMES: 1.2M units (+41%)
NEW OFFICE SPACE: 2.8M sq. ft. (+24%)

KEY DEMOGRAPHIC SHIFT: The Asian population will more than triple; the number of seniors will double.

NEW GROWTH INDUSTRY: Seattle will become one of three global hubs for bio-informatics startups.

BEST BUSINESSES TO START: Architectural firms catering to green developers.

BEST RESIDENTIAL REAL ESTATE BET: \$200,000 homes in small towns 30 minutes outside Portland, beyond the urban-growth boundary.

BEST COMMERCIAL REAL ESTATE BET: Retail or office space around Snoqualmie Ridge, one of three "urban villages" in early development near Seattle.

GOVERNMENT CARROT: Oregon's new property-rights law, which opens the door to more rural development.

IT'S ALREADY TOO LATE TO...: Socialize on Paul Allen's Seattle redevelopment project, South Lake Union.

VALLEY OF THE SUN

This is the smallest megapolitan, but the one with the greatest supply of raw, buildable land at the lowest prices—one reason it will soon be the fastest-growing metro region in the country. The big draw: a Palm Springs lifestyle for the masses at a substantial discount.

NEW PEOPLE: 1.8M (+62%)
NEW JOBS: 1.3M (+45%)
NEW HOMES: 840,000 units (+54%)
NEW OFFICE SPACE: 2.9M sq. ft. (+58%)

KEY DEMOGRAPHIC SHIFT: Phoenix will remain the top destination city for Americans moving from other states.

NEW GROWTH INDUSTRIES: Higher education and biotech research; big-box retail; and higher-end weapons engineering.

BEST BUSINESSES TO START: Fast-food, coffee, and retail establishments in Maricopa, another edge city set to boom.

BEST RESIDENTIAL REAL ESTATE BET: A house in a virgin subdivision like Venado, undeveloped low-cost areas and office parks aren't yet built.

IT'S ALREADY TOO LATE TO...: Buy land you think will become a future freeway interchange. Investors have gobbled up acreage along I-10 as far as 65 miles west of Phoenix.

BEST COMMERCIAL REAL ESTATE BET: A large bordering luxury-home developments announced by regional builders like Phoenix's DMR.

GOVERNMENT CARROT: Expansion at Arizona State University, which will increase its enrollment by 50 percent to 90,000 students and generate more than 10,000 new jobs by 2020.

KEY DEMOGRAPHIC SHIFT: Dallas's Caucasian population will jump 30 percent over the next two decades as relatively cheap real estate draws more people willing to move from overseas markets in other states.

NEW GROWTH INDUSTRIES: Transco to deregulation and subsidies. Texas will be the country's new base for wind power. Auto manufacturers will move operations here to capitalize on cheaper labor.

BEST BUSINESSES TO START: Parts and components subcontractors to major suppliers for Toyota's new San Antonio plant.

BEST RESIDENTIAL REAL ESTATE BET: Starter homes and townhouses in Latino neighborhoods of Dallas and San Antonio.

BEST COMMERCIAL REAL ESTATE BET: Land along I-35 north of Dallas, where new edge cities are leeching each other.

IT'S ALREADY TOO LATE TO...: Invest in waterfront homes on the many bays surrounding Austin. The bids are all and prices have soared.

GREAT LAKES HORSESHOE

Hit hard by manufacturing's decline, the constellation of Northern industrial cities is morphing into a service-economy region and will draw a flood of immigrants.

NEW PEOPLE: 4M (+10%)
NEW JOBS: 1.2M (+7%)
NEW HOMES: 2.5M units (+16%)
NEW OFFICE SPACE: 14M sq. ft. (+94%)

KEY DEMOGRAPHIC SHIFT: With the smallest percentage of baby boomers of all the megapolitans, this region will have one of the most plentiful prime-age workforces for the next two decades.

NEW GROWTH INDUSTRIES: Third-party logistics contractors that manage supply chains for companies ranging from carmakers to retailers.

BEST BUSINESSES TO START: Retail stores and restaurants in Latino enclaves like Chicago's Little Village.

BEST RESIDENTIAL REAL ESTATE BET: Joliet, an old steel-mill town on the Des Plaines River and the hub of Will County, is expected to be among Illinois's fastest-growing towns in the next quarter-century.

IT'S ALREADY TOO LATE TO...: Redevelop a lot within Chicago's Loop. Trump was one of the last to move in.

ATLANTIC SEABOARD

The country's most heavily populated megapolitan braces for another boom. Where will most of the development go? Up: Urban infill will outstrip suburban growth.

NEW PEOPLE: 6.2M (+12%)
NEW JOBS: 1.5M (+24%)
NEW HOMES: 2.4M units (+17%)
NEW OFFICE SPACE: 17.2M sq. ft. (+18%)

KEY DEMOGRAPHIC SHIFT: Native residents will leave for the Sun Belt, but the influx will be offset by new immigrants from abroad.

NEW GROWTH INDUSTRIES: New York City and Boston will be hotbeds of quantum computing and encryption.

BEST BUSINESSES TO START: For-profit colleges and professional schools located near major cities.

BEST RESIDENTIAL REAL ESTATE BET: A \$250,000 house in Luthy Valley, Pa., and not just because it has some of the cheapest land in the region.

IT'S ALREADY TOO LATE TO...: Buy and flip monster homes in the exurbs, where prices are sagging.

NORCAL

The action is moving east from the Bay Area. The Sacramento metro region will build more housing and office space in the next 25 years than any other Western megapolitan city except Las Vegas.

NEW PEOPLE: 4.3M (+18%)
NEW JOBS: 2M (+19%)
NEW HOMES: 1.5M units (+23%)
NEW OFFICE SPACE: 4.4M sq. ft. (+22%)

KEY DEMOGRAPHIC SHIFT: Flight of skilled workers from the Bay Area to the region's cheaper exurbs.

NEW GROWTH INDUSTRY: NorCal will host a new technology industry that marries pharmaceuticals and computers, critical intelligence startups will likely flourish.

BEST BUSINESSES TO START: New Central Valley towns have an across-the-board demand for everything from restaurants to hospitals and hotels.

BEST RESIDENTIAL REAL ESTATE BET: \$340,000 homes in and around Merced, home to the "newest" University of California campus. Estimated student population in 2030: 25,000.

BEST COMMERCIAL REAL ESTATE BET: Future acquisition of property owned by old, declining industrial businesses in the Bay Area, for pennies on the dollar.

GOVERNMENT CARROT: The new stem-cell research center in San Francisco, which will control \$3 billion in state funding over 10 years.

IT'S ALREADY TOO LATE TO...: Buy a condo in one of two luxury towers due to break ground soon in Sacramento's downtown. The waiting list is possibly long.

I-85 CORRIDOR

The 400-mile stretch from Atlanta to Raleigh is fast becoming a contiguous strip of McManis and McDonald's. As textile manufacturing fades, consumer banking in Charlotte, telecom in Atlanta, and high-tech in the Raleigh-Durham Research Triangle drive the growth.

NEW PEOPLE: 7M (+33%)
NEW JOBS: 1.3M (+30%)
NEW HOMES: 2.1M units (+40%)
NEW OFFICE SPACE: 7.7M sq. ft. (+20%)

KEY DEMOGRAPHIC SHIFT: Elsewhere, Latino arrivals pin already thriving communities. Here they'll be building neighborhoods from scratch.

NEW GROWTH INDUSTRIES: Food and nutrition-product startups emerging from a planned \$1 billion biotech research hub outside Durham.

BEST BUSINESSES TO START: Distribution firms to handle the inflow of Chinese imports via Savannah and other regional ports; home-health-care centers catering to seniors.

BEST RESIDENTIAL REAL ESTATE BET: A \$250,000, two-bedroom home in Faldstone, an up-and-coming neighborhood in north Durham.

BEST COMMERCIAL REAL ESTATE BET: Raleigh along I-85 in rural North Carolina that will become part of a planned tech-research park to support the Research Triangle.

GOVERNMENT CARROT: Long-term tax relief for new industrial tenants like Dell.

IT'S ALREADY TOO LATE TO...: Buy a teardown in Atlanta's Midtown West neighborhood and build a dream home close to downtown. Big developers are already moving in.

SOUTHLAND

Trade with China through the country's largest port, Los Angeles, will fuel a boom in logistics, warehousing and distribution centers for companies like Target. New military and space programs will do for the Southland what the Internet did for NorCal in the 1990s.

NEW PEOPLE: 8M (+33%)
NEW JOBS: 3.7M (+40%)
NEW HOMES: 2.7M units (+26%)
NEW OFFICE SPACE: 8.3M sq. ft. (+15%)

KEY DEMOGRAPHIC SHIFT: By 2030, male illegal immigrants from Mexico will likely make up more than 10 percent of the Southland's workforce; no other megapolitan comes close to having the supply of cheap labor.

NEW GROWTH INDUSTRY: With freight volume projected to triple by 2030, warehouse builders will become the fastest-growing commercial developers in the region.

BEST BUSINESSES TO START: Los Angeles for tomorrow's upscale restaurants near I-5 in San Bernardino County; Billions in local, state, and federal funding that will be used to build 150 miles of truck-only express lanes in Los Angeles, Orange County, and the Inland Empire by 2020.

IT'S ALREADY TOO LATE TO...: Buy raw land around Las Vegas for sprawl development; prices are soaring because it's hemmed in by federally owned property.

BEST RESIDENTIAL REAL ESTATE BET: \$125,000-unit gets gets a 2,300-square-foot house in Apple Valley, one of dozens of suburban boomtowns emerging east of Los Angeles.

BEST COMMERCIAL REAL ESTATE BET: Paving jobs in downtown

GULF COAST BELT

Hurricane Katrina will for decades exaggerate a divide at the Texas-Louisiana border between the region's richer western section and the poorer eastern one. Surrounding megapolitans will enjoy slower growth because of the Gulf Coast Belt's higher risk premium.

NEW PEOPLE: 1.8M (+31%)
NEW JOBS: 2M (+30%)
NEW HOMES: 1.5M units (+54%)
NEW OFFICE SPACE: 4.8M sq. ft. (+20%)

KEY DEMOGRAPHIC SHIFT: By 2015, Houston will have one of the nation's highest surges in workers under age 25 and retirement-age boomers waiting to die.

NEW GROWTH INDUSTRIES: Homeland security technologies will emerge around Louisiana's complex of ports.

BEST BUSINESSES TO START: Law firms, accounting shops, or restaurants in the "borderline" that cater to U.S. companies with manufacturing facilities south of the border.

BEST RESIDENTIAL REAL ESTATE BET: Houses on hills in Baton Rouge. Its population has more than doubled since Katrina. Those who can afford to stay will be buying.

BEST COMMERCIAL REAL ESTATE BET: Discarded industrial property that should become big-box retail or other commodities.

GOVERNMENT CARROT: New coastal infrastructure, courtesy of the U.S. Army Corps of Engineers.

IT'S ALREADY TOO LATE TO...: Buy New Orleans waterfront space that should be damaged. FEMA contractors and other infrastructure providers are renting out the properties.

SOUTHERN FLORIDA

The state posted the nation's highest job growth last year as baby boomers from the North poured in to take advantage of the job market and climate. Land scarcity will drive urban growth.

NEW PEOPLE: 7.3M (+52%)
NEW JOBS: 3.4M (+60%)
NEW HOMES: 1.9M units (+57%)
NEW OFFICE SPACE: 6.2M sq. ft. (+100%)

KEY DEMOGRAPHIC SHIFT: The 65-and-over population will continue to swell, doubling by 2025.

NEW GROWTH INDUSTRIES: Florida will lead the nation in health care for the elderly. Service Research Institute will use a biotech cluster with its new research center based in West Palm Beach.

BEST BUSINESSES TO START: Sports bars or national fast-food franchises near new residential developments outside Bradenton and Sarasota.

BEST RESIDENTIAL REAL ESTATE BET: A \$200,000 house in Venice and Terra, where demand is so high that bidders hold lotteries.

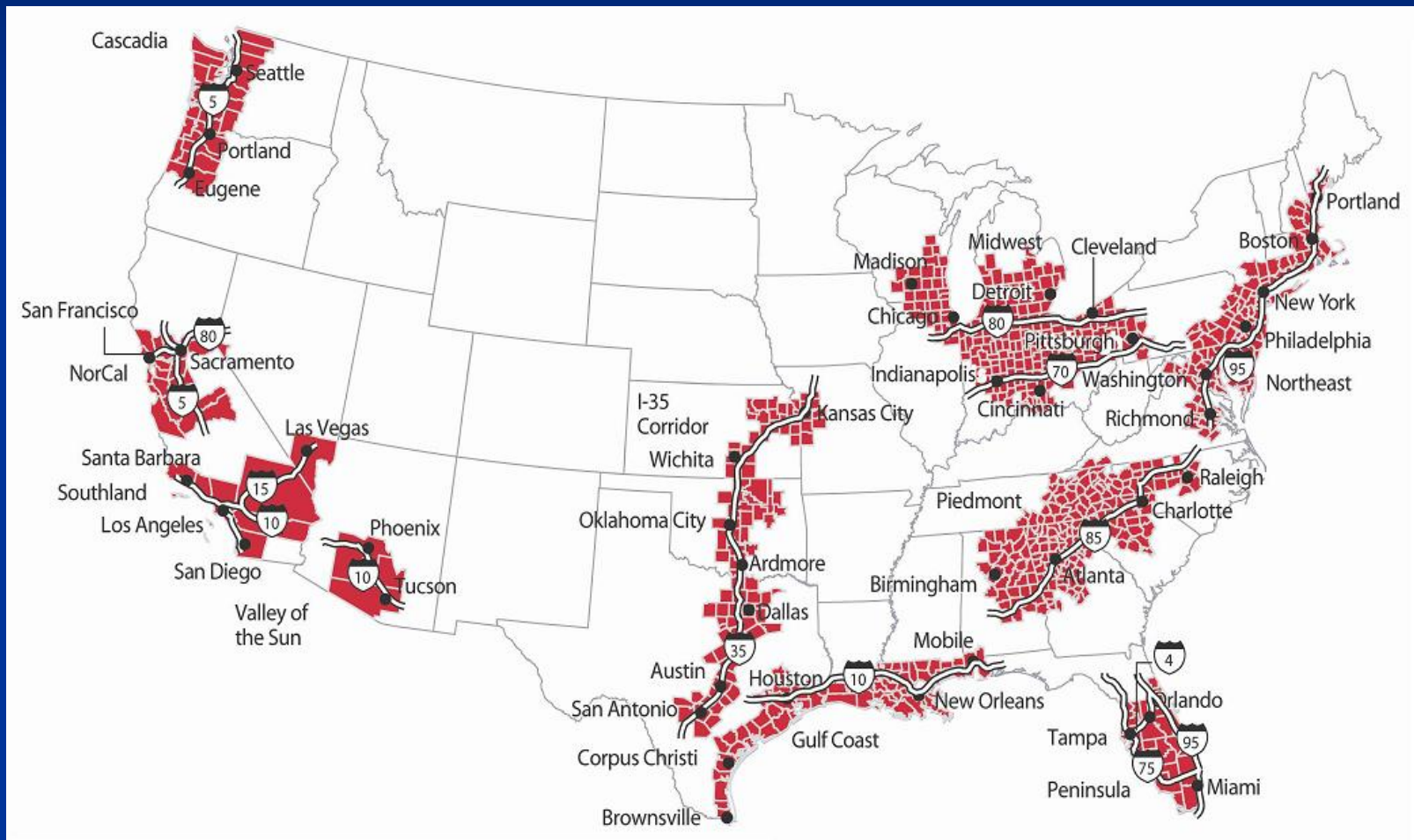
BEST COMMERCIAL REAL ESTATE BET: Hand lots in Miami County, where cities will boom by 2030.

GOVERNMENT CARROT: An elite but a godlike no state income tax.

IT'S ALREADY TOO LATE TO...: Buy a house with money saving a few profit-making home. Rising insurance costs are killing margins.

SOURCES: Population, employment, and real estate growth forecasts by Robert Lang and Arthur Nelson of the Metropolitan Institute at Virginia Tech and Phil Hopkins of Global Insight. Regional economic and investment outlooks based on more than 50 interviews with national and regional planners, real estate developers and brokers, public policy experts, government and local officials, and business, demographic data from World & Pacific Economics and Pew Hispanic Center. Additional reporting by Gabe Wozniak.

2005 Megapolitan Geography



2005 Megapolitan Geography



What is Strategic Visioning?

Analysis of alternative scenarios to make wise decisions in the face of uncertainty.

A vision is not a forecast, but a strategy to preserve best options.

Why Do Regional Visioning?

To help the public and today's
decision makers understand
the long-term consequences of
the choices they make now

(Vision Horizon?)



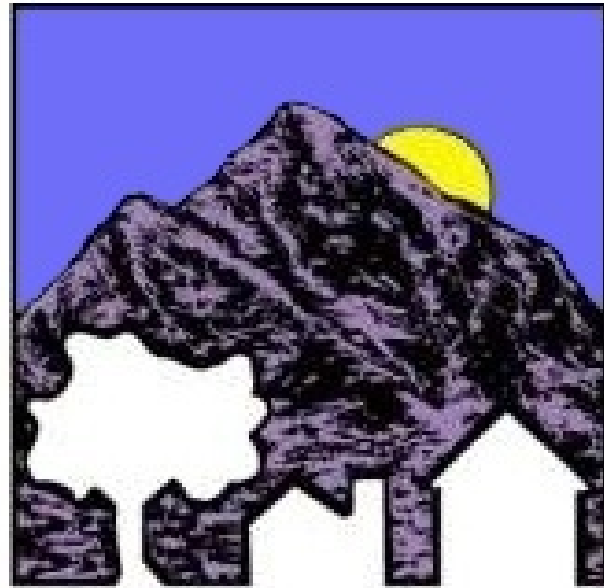


History of Planning in Utah



In 1997, Utah Faced Serious Challenges

- A million new residents by 2020
- Air quality at risk
- Doubling urban land by 2020
- New water sources needed by 2010
- Crowding and congestion increasing
- Business and personal costs rising
- Infrastructure needs outstripping resources



ENVISION UTAH

A Partnership for Quality Growth

Formed in 1997 by the Coalition for Utah's
Future to evaluate and address growth

Our Mission

Envision Utah engages people to create and sustain communities that are **beautiful, prosperous, healthy and neighborly** for current and future residents

An aerial photograph of the Philadelphia skyline, featuring prominent skyscrapers like the Comcast Center and the Liberty Bell Center. The city is densely packed with buildings, and the Schuylkill River is visible in the background.

**5 million
people by 2050**



PHILADELPHIA SKYLINE

Greater Wasatch Area

**Over 500 City
Council
Members**

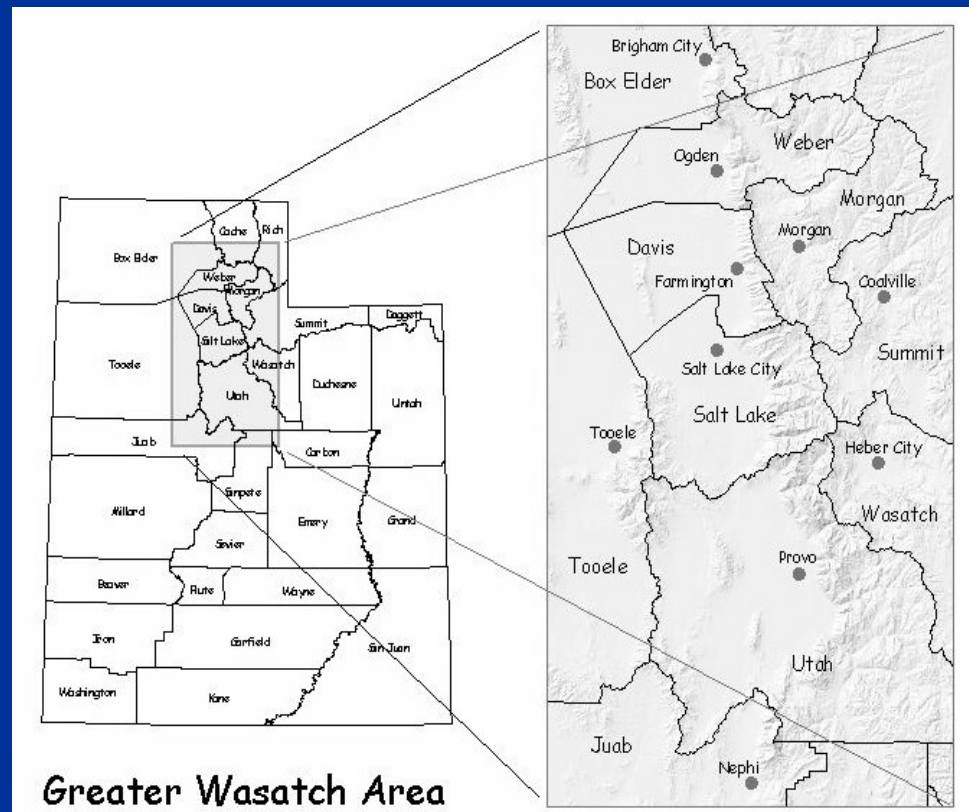
**Over 500 Planning
Commissioners**

**30 County
Commissioners**

90 Mayors

**100's of developers,
realtors and other
key stakeholders**

- **10 Counties**
- **90 Cities and Towns**
- **157 Special Service Districts**





GRONDAHL STANDARD EXAMINER

Broad Scope of Community

- Business Leaders
- Developers
- Utility Companies
- Local and State Government
- Conservation and Citizen Groups
- Religious Leaders
- Education
- Media



Who Are Stakeholders?



- ❑ Respected, trusted, and well-known citizen leaders.
- ❑ Committed to an honest, open, and fair evaluation of the issues.
- ❑ Those affected (positively or negatively) by the outcome of the process.
- ❑ Those who can implement the outcome of your process.
- ❑ Love your community.

A stakeholder group is not a coalition with a common agenda but a collaboration of all affected parties.

Who are Champions?



- The “public face” of your process
- Deliver your message
- Articulate, persuasive, passionate
- Speak with community values
- Trusted by diverse constituencies
- Love your community

Champions of what? (the process)



**A Visit
by
Brigham Young,
Utah's First Regional Planner**



Traditional Planning Approach

- **Decide** – through analysis and research
- **Educate** – the public about the solution
- **Announce** – the plan
- **Defend** – the plan and yourself

Traditional Planning Approach

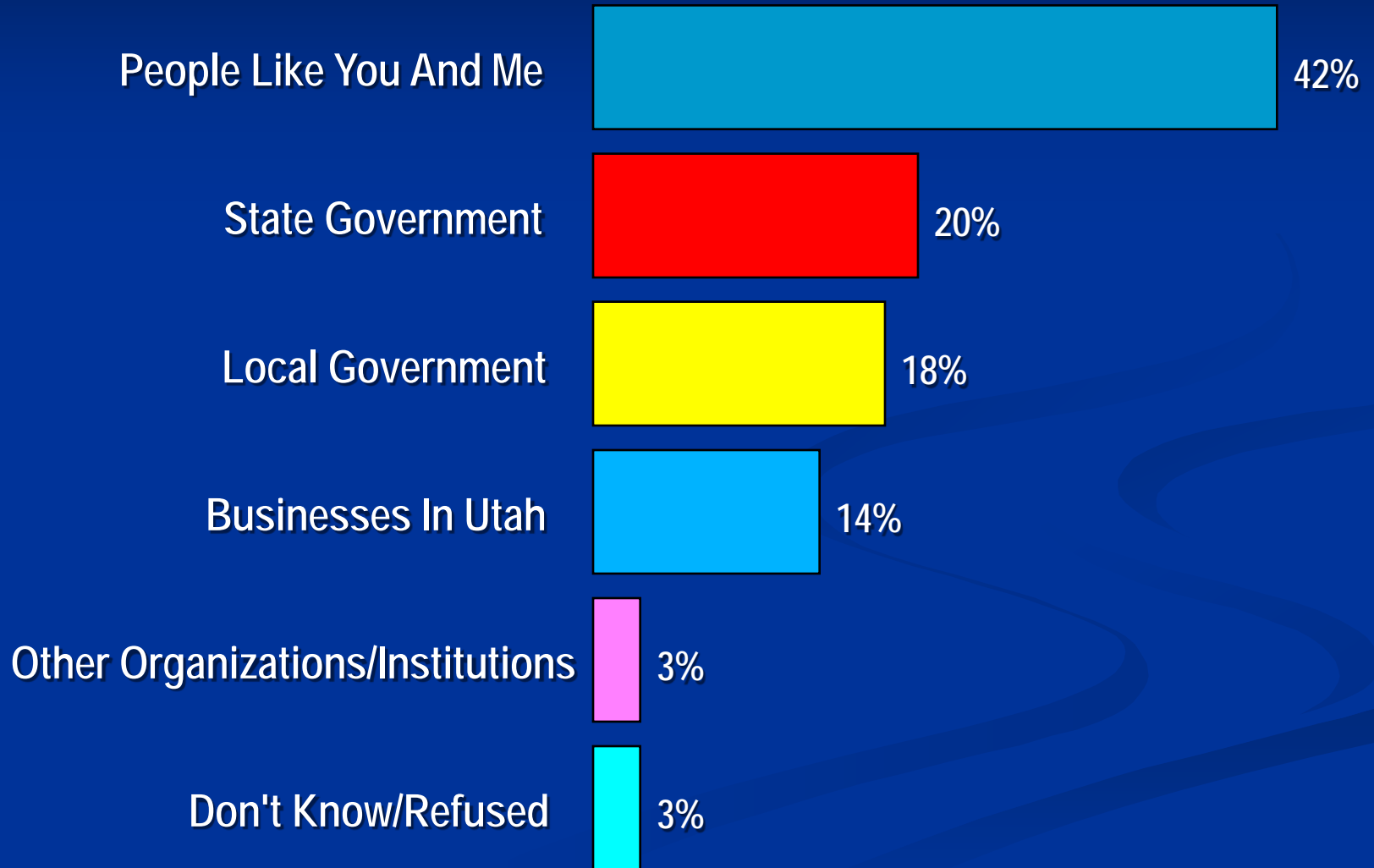
■ D

■ E

■ A

■ D

Who Can Best Deal With Growth Issues?



n=400

The Premise of Envision Utah

- The “public” has the right to choose its future—public officials should serve that vision
- The “public” will make good choices if presented with real options

Improved Process

VALUES (*What do people want?*)

VISION (*How will our Region provide it?*)

STRATEGY (*How do we implement?*)

PLAN

FUND

BUILD

Why Start Visioning With Values?

- Values are stable and enduring; life's "tides" as opposed to the "waves."
- Values are widely shared and create consensus among diverse groups.
- Satisfying ones' values is the foundation of personal decision making.

Values for Creating Great Communities



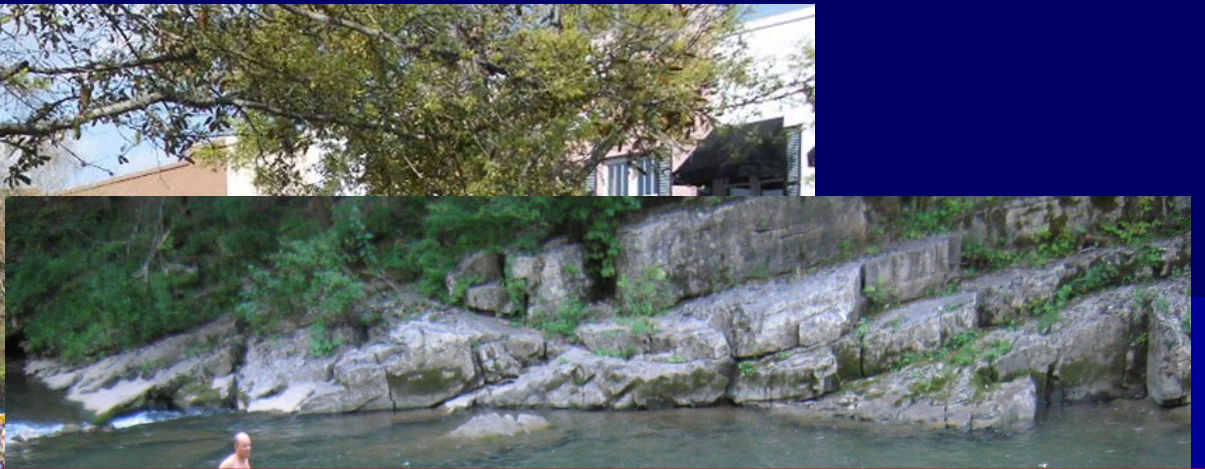
Personal Growth and WELL-BEING

Physical Wellness



Lifelong Learning

Higher Education



Community



Neighborliness



Community Interactions

The image is a collage of nature photographs. The central, largest photograph shows a dirt path winding through a lush garden or park. The path is covered in fallen leaves and is flanked by dense green bushes and trees. In the distance, a few people are walking on the path. Overlaid on this central image is a semi-transparent red rectangle containing the word "NATURE" in large, bold, green capital letters. To the left of the central image is a vertical strip showing a close-up of a waterfall. To the right is another vertical strip showing a dirt path curving through a forest. The top of the image features a horizontal strip of a dense green forest. The bottom of the image has a solid blue background with the text "Access to Nature" in white.

NATURE

Access to Nature

The image is a collage of three photographs. The top-left photo shows a woman and two children sitting on a light-colored rug in a room with white curtains. The top-right photo is a close-up of a man's face, looking towards the camera, with a blurred background of warm lights. The bottom-right photo shows a young boy in a striped shirt holding a fishing rod, standing on a boat with a cloudy sky in the background. The word "FAMILY" is written in large, green, serif capital letters across the center of the collage, partially overlapping the photos.

FAMILY

Tim

Famil

Quality Recreational Activities

The image is a collage on a dark blue background. It features three distinct photographs. The top-left photo shows a police officer in a yellow jacket and helmet standing on a street next to a red car. The top-right photo shows a family of four walking away on a paved path through a park with many trees. The bottom-left photo shows a red car with significant front-end damage on a street, with a man standing next to it. The word "security" is written in large, green, lowercase letters across the middle of the collage, overlapping the family photo and the car accident photo.

security

Peace of Mind

Fewer Accidents

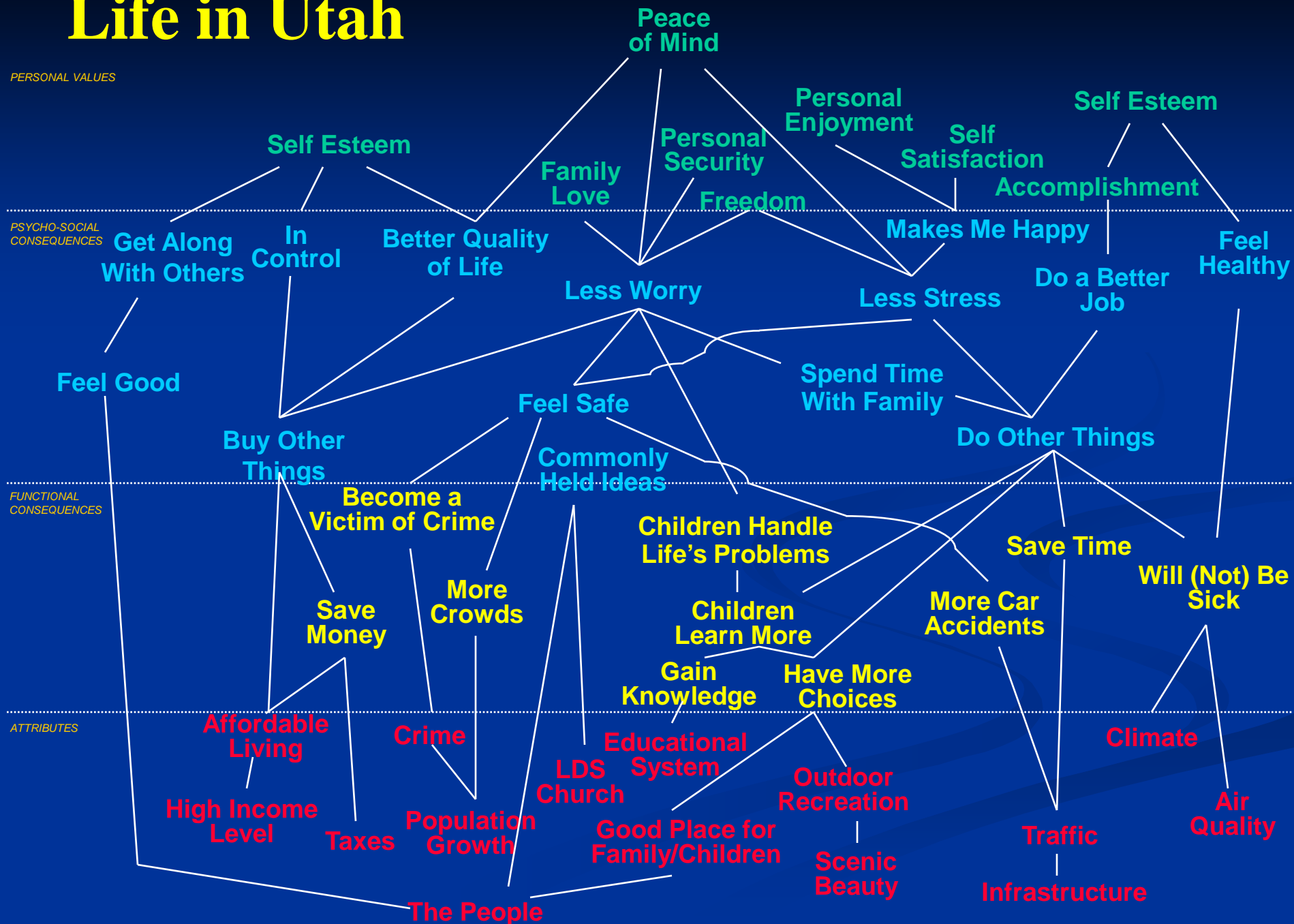
Public Workshops

Hundreds of
meetings with
thousands
of participants



Life in Utah

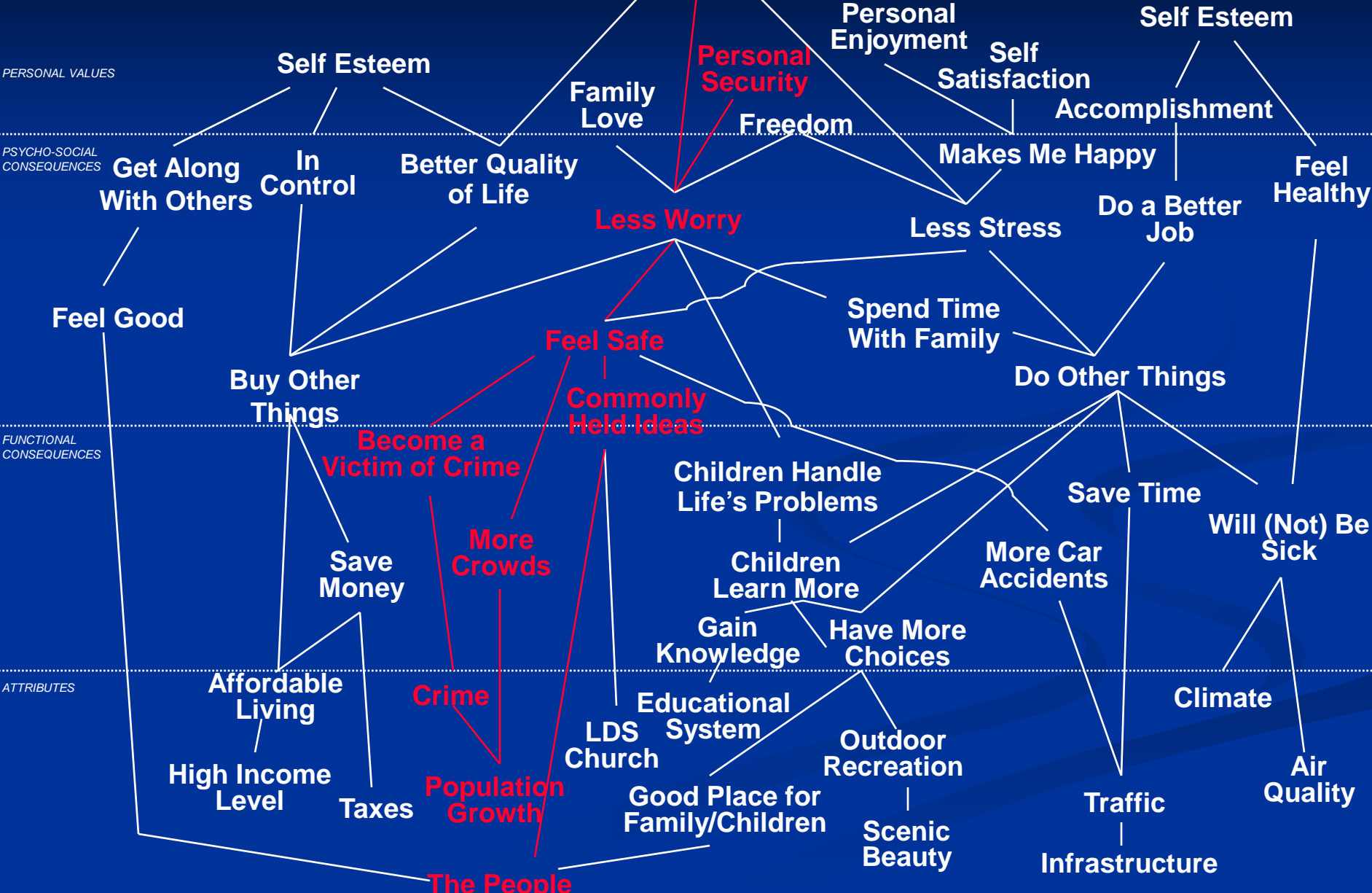
PERSONAL VALUES



Safe and Secure Environment

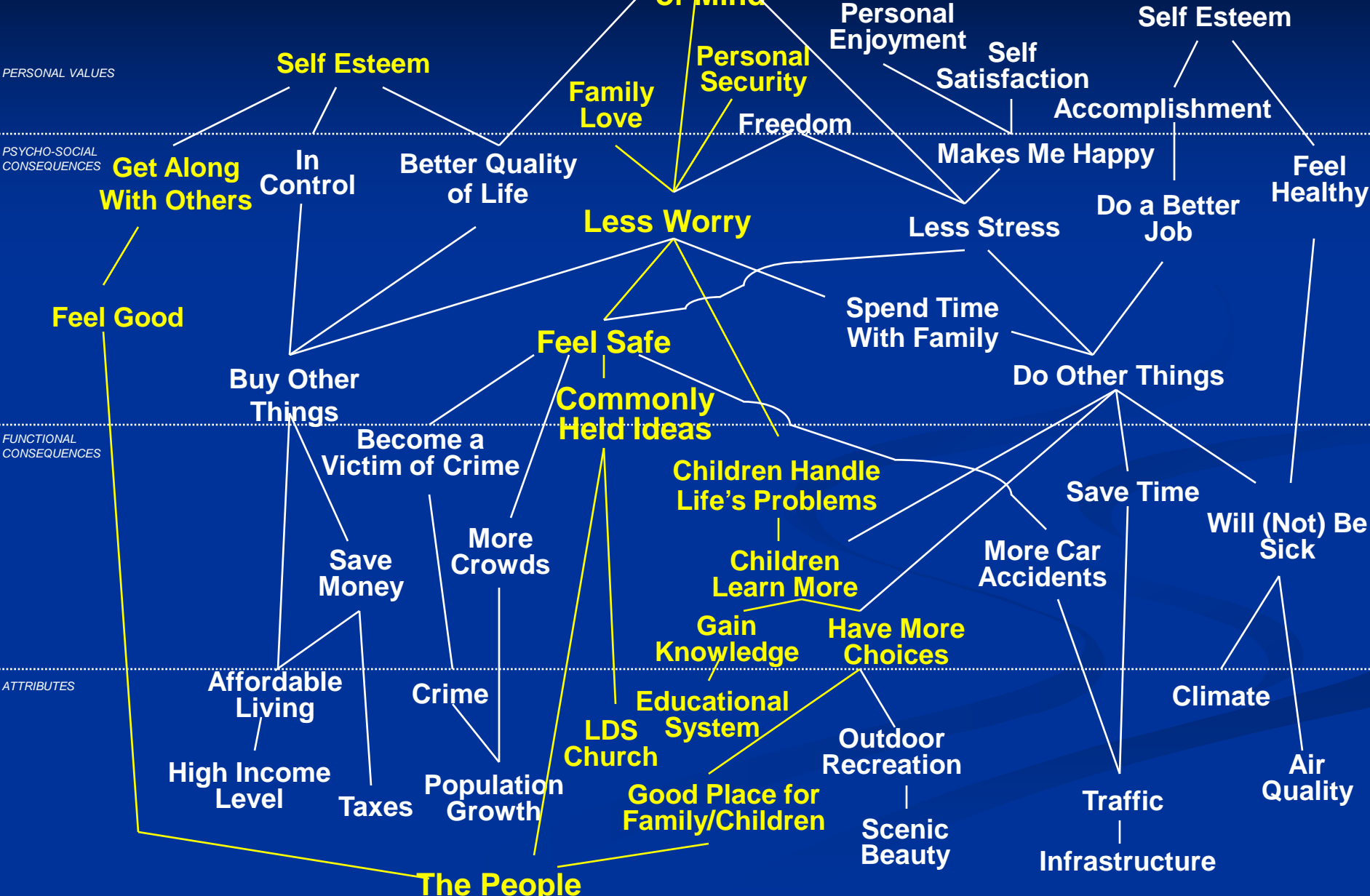
Gateway Value

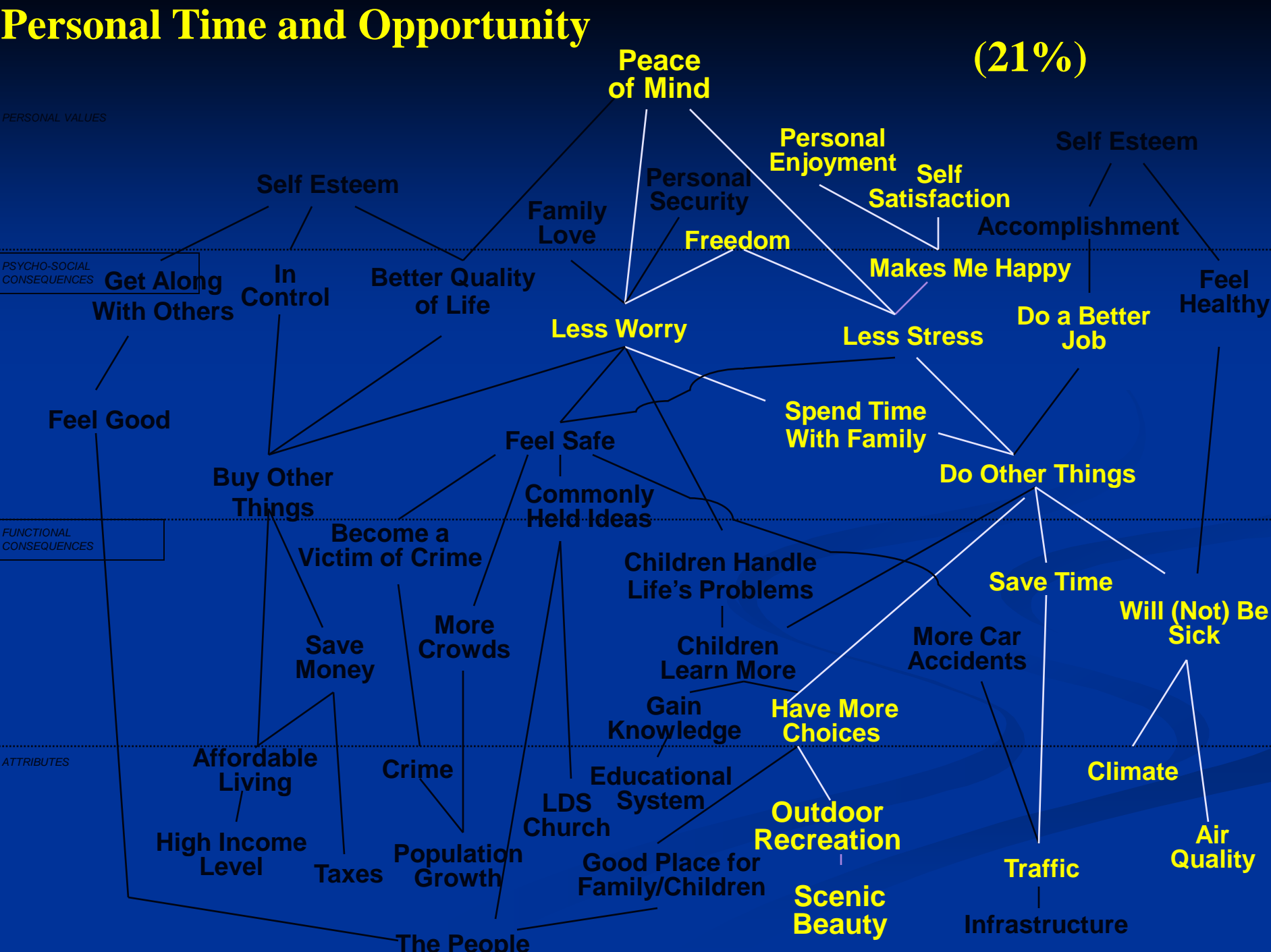
(34%)



Personal and Community Enrichment (31%)

Gateway Value



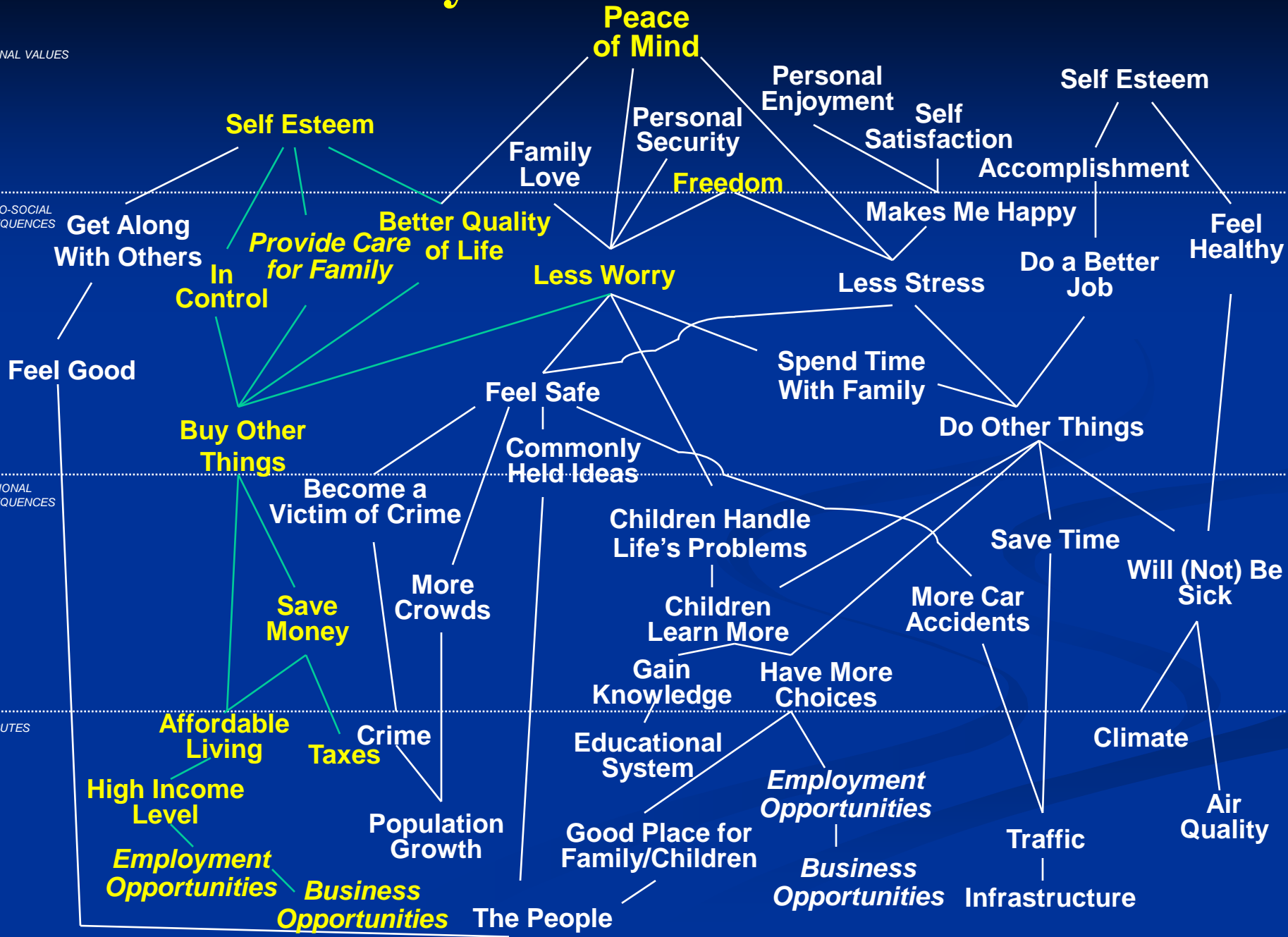


(14%)

PSYCHO-SOCIAL CONSEQUENCES

FUNCTIONAL CONSEQUENCES

ATTRIBUTES



Key Barrier to Quality of Life: High Cost of Living

The high cost of living and housing in San Diego, combined with the scarcity of good-paying jobs, forces many residents (or their children) to live a lower quality of life or leave the area altogether, resulting in worry and stress and robbing them of peace of mind and happiness.

Can't Afford To Live and Enjoy

Residents

Lack of well being,
unhappiness,
no peace of mind

Worry, Stress,
Poor Quality of Life

Can't afford to
live, have to leave
community

High cost of living,
expensive housing,
shortage of jobs

San Diego

Issues

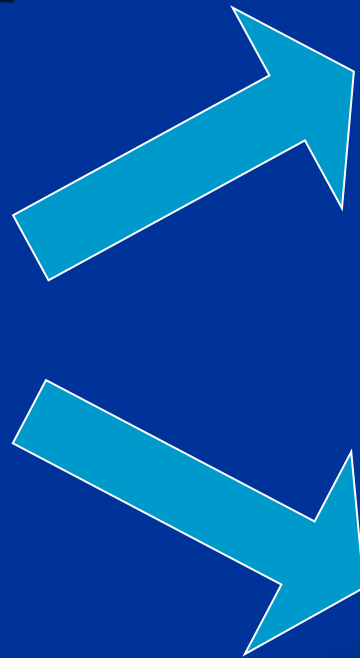
- Housing
- Jobs/wages
- Cost of living
- Transportation costs

To be sustainable,
a region must satisfy the
values, hopes, and dreams of
present and future residents

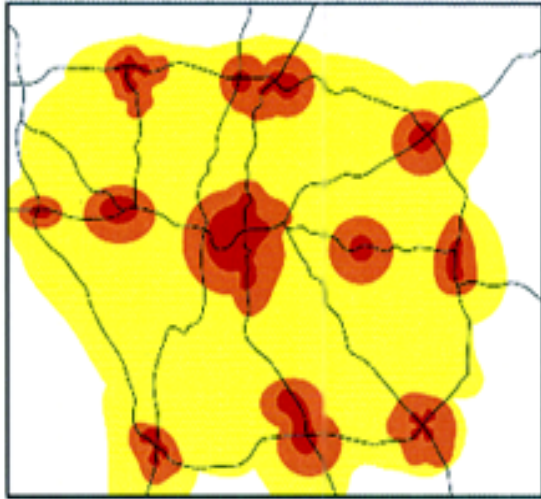
Regional Visioning
Uses **Scenarios**
to Ask Important Questions
and help the Public make
Tradeoffs

Scenario Approach:

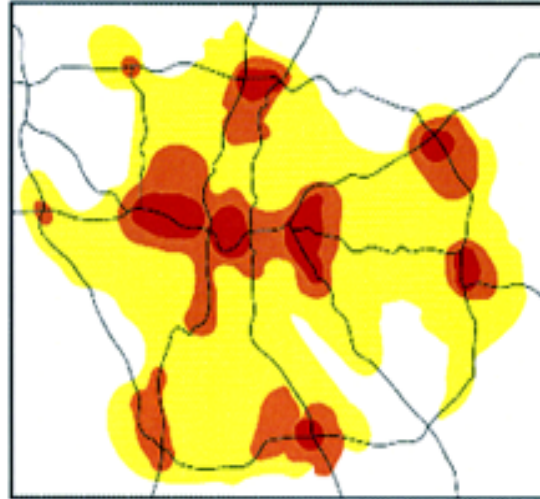
Contrasts today's choices by
showing long-term
consequences



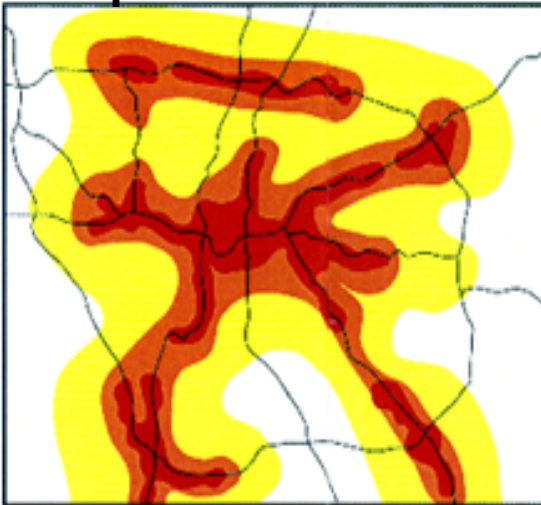
Develop a Range of Choices



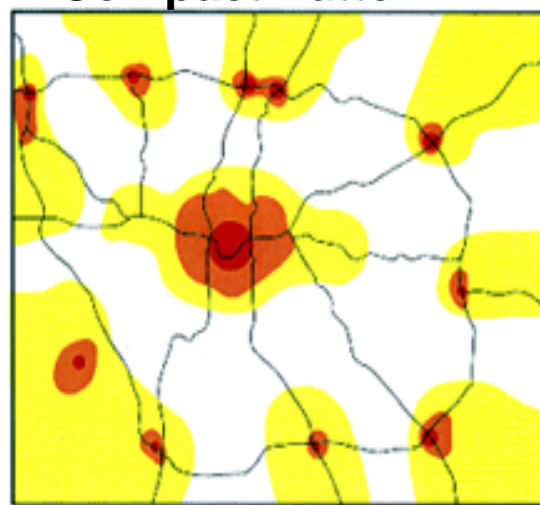
Dispersed Pattern



Compact Pattern

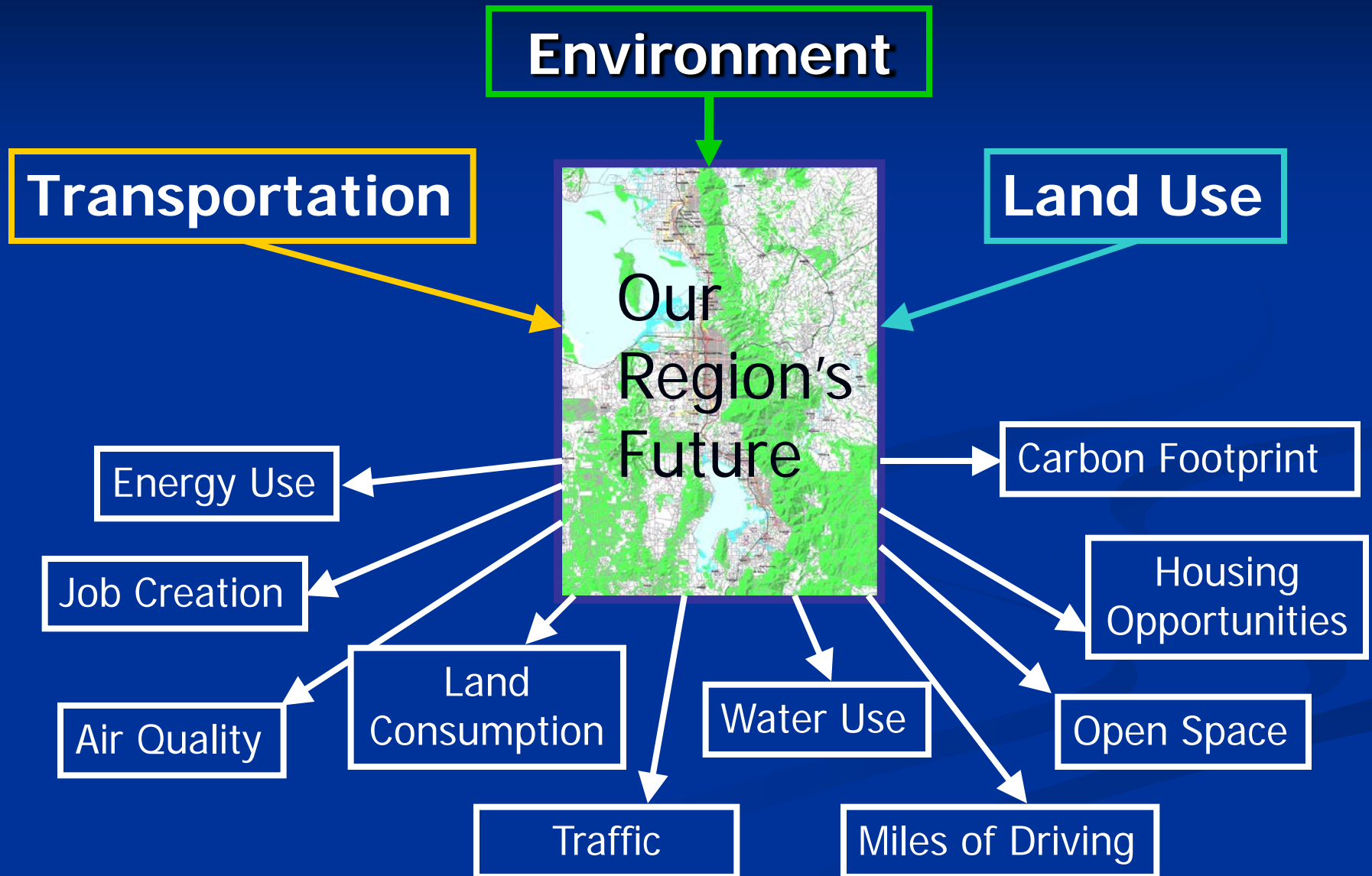


Corridor Pattern



Satellite Pattern

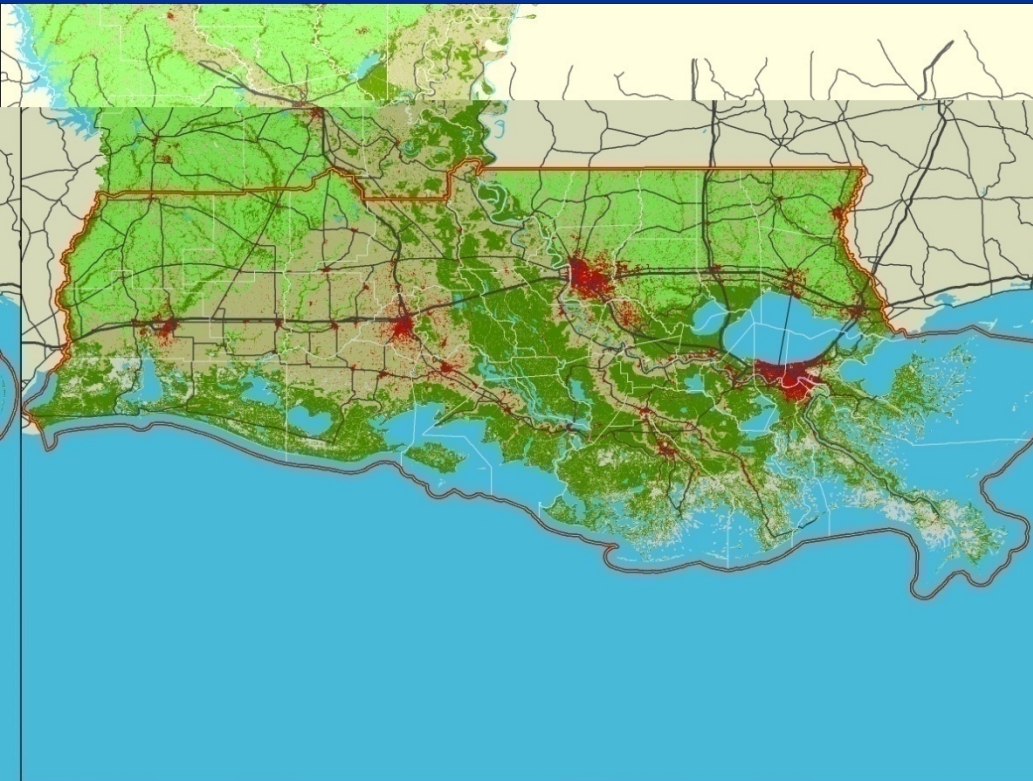
Regional Choices and Outcomes



LOUISIANA SPEAKS

Visioning for Southern Louisiana

Our Voice. Our Plan. Our Future



Louisiana
May 16-17, 2006

Robert J. Grow
Sr. Counsel, O'Melveny &
Myers
and Envision Utah,
Founding Chair Emeritus
(rgrow@omm.com)

Hurricane Impacts Were the Key Driver for the Plan



Hurricane Rita
22 September 2005

Hurricane Katrina
28 August 2005

The Bowl of New Orleans









5328

10/13
F/W

BEWARE
OF THE DOG

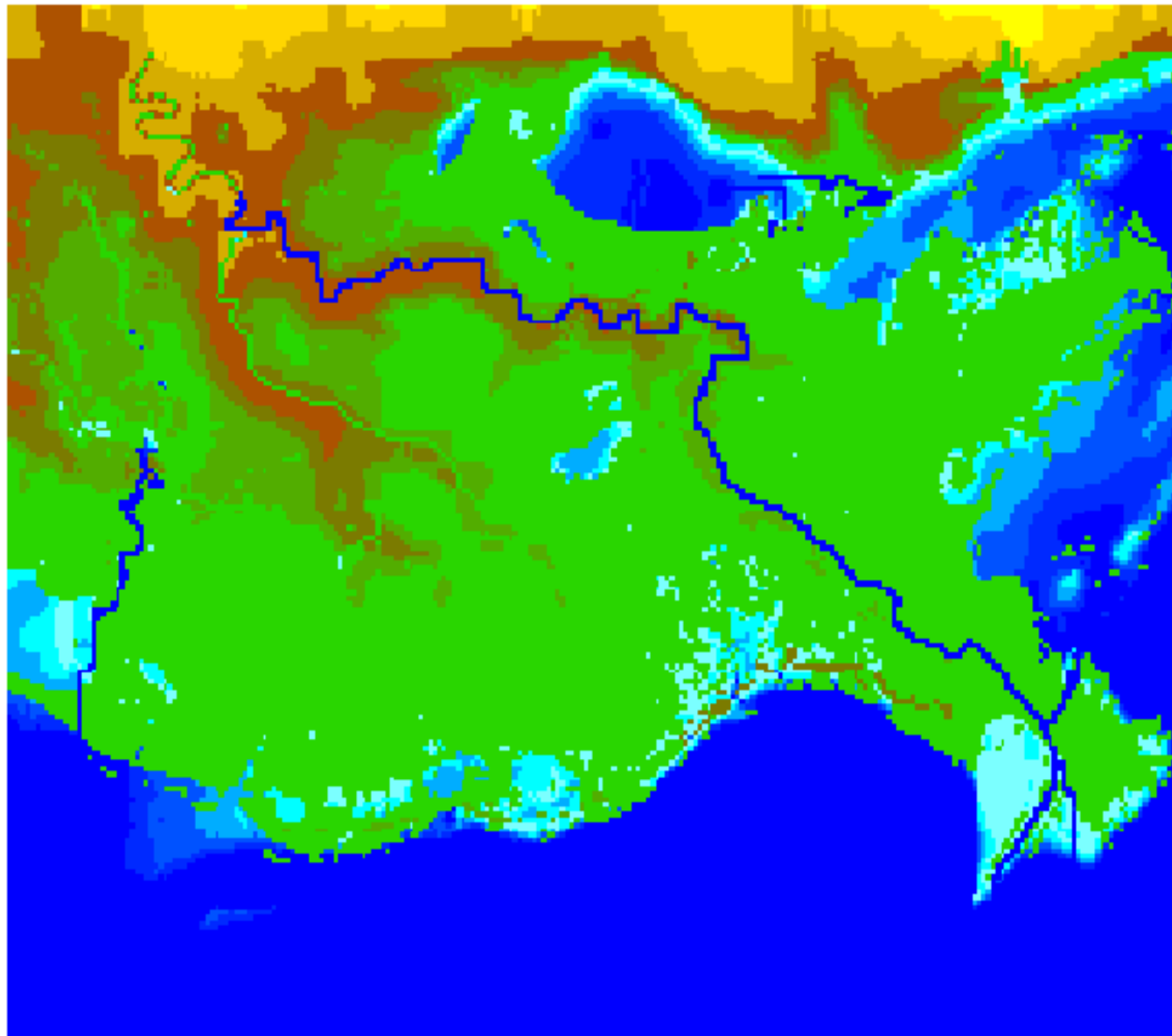
9/30
10-3
+10/6
(SICK)
TAKEN
X DOGS





1839

Topography (1839)



Legend

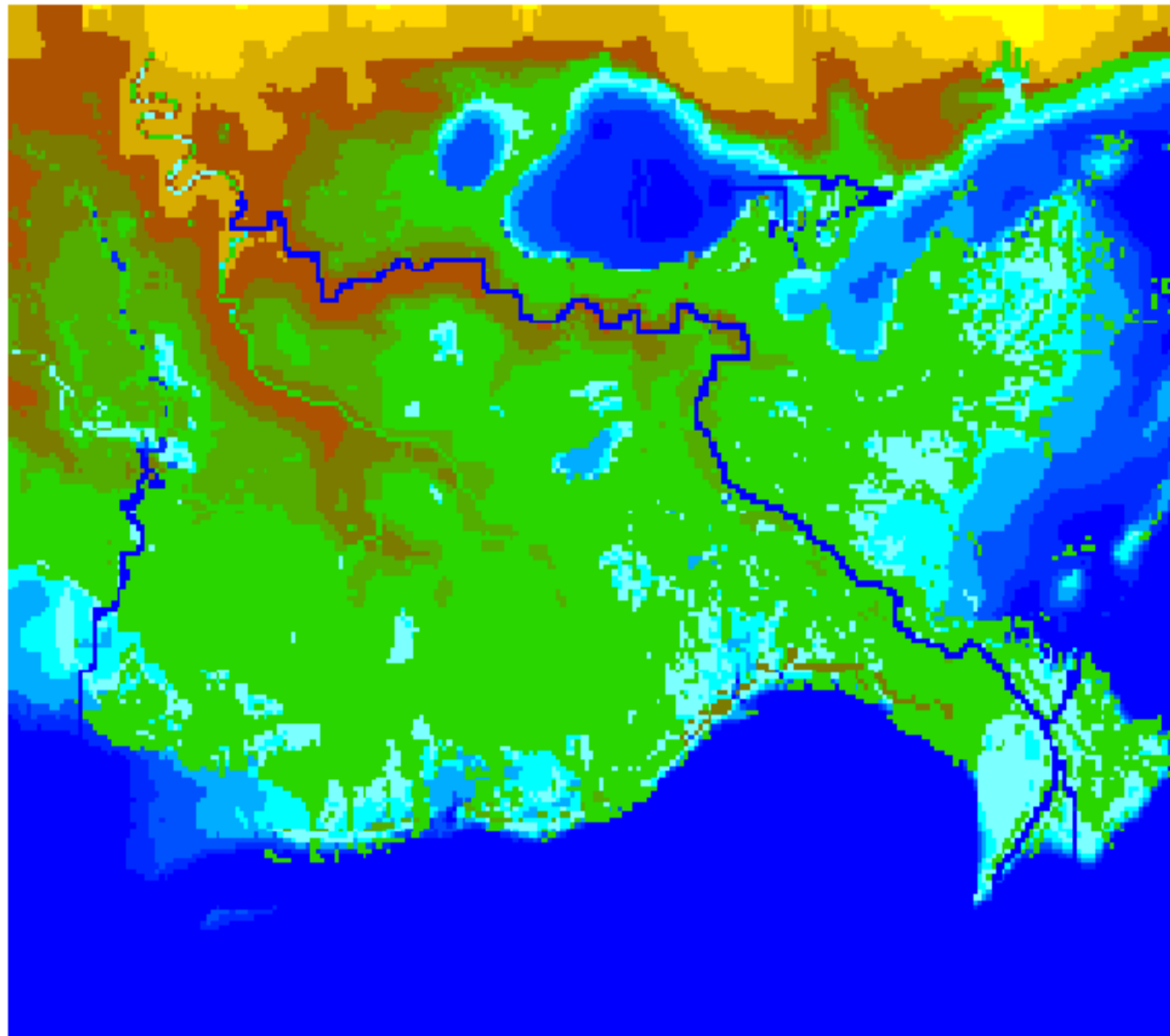
- > 16 ft Water
- > 16 ft Water
- > 12 ft Water
- > 8 ft Water
- > 8 ft Water
- > 8 ft Water
- > 8 ft Water
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- > 8 ft Land
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- > 8 ft Land

0 10 20
KILOMETERS

Topography by NOAA/NOAA/NOAA

1870

Topography (1870)



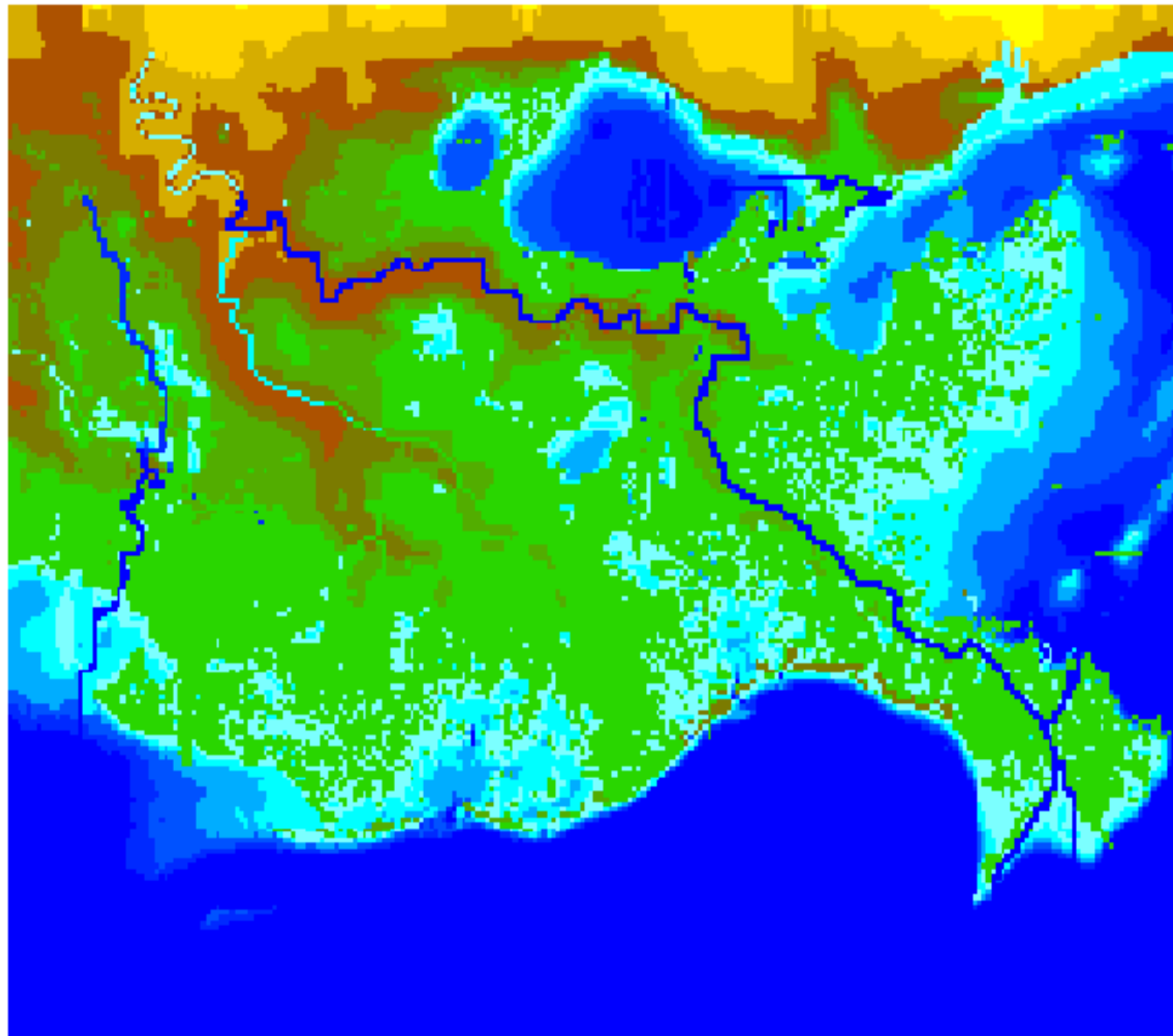
Legend

- > 18 ft Water
- > 15 ft Water
- > 12 ft Water
- > 9 ft Water
- > 6 ft Water
- > 3 ft Water
- > 0 ft Water
- > 0 ft Land
- > 2 ft Land
- > 4 ft Land
- > 6 ft Land
- > 8 ft Land
- > 10 ft Land
- > 12 ft Land
- > 14 ft Land

0 10 20
KILOMETERS

1930

Topography (1930)



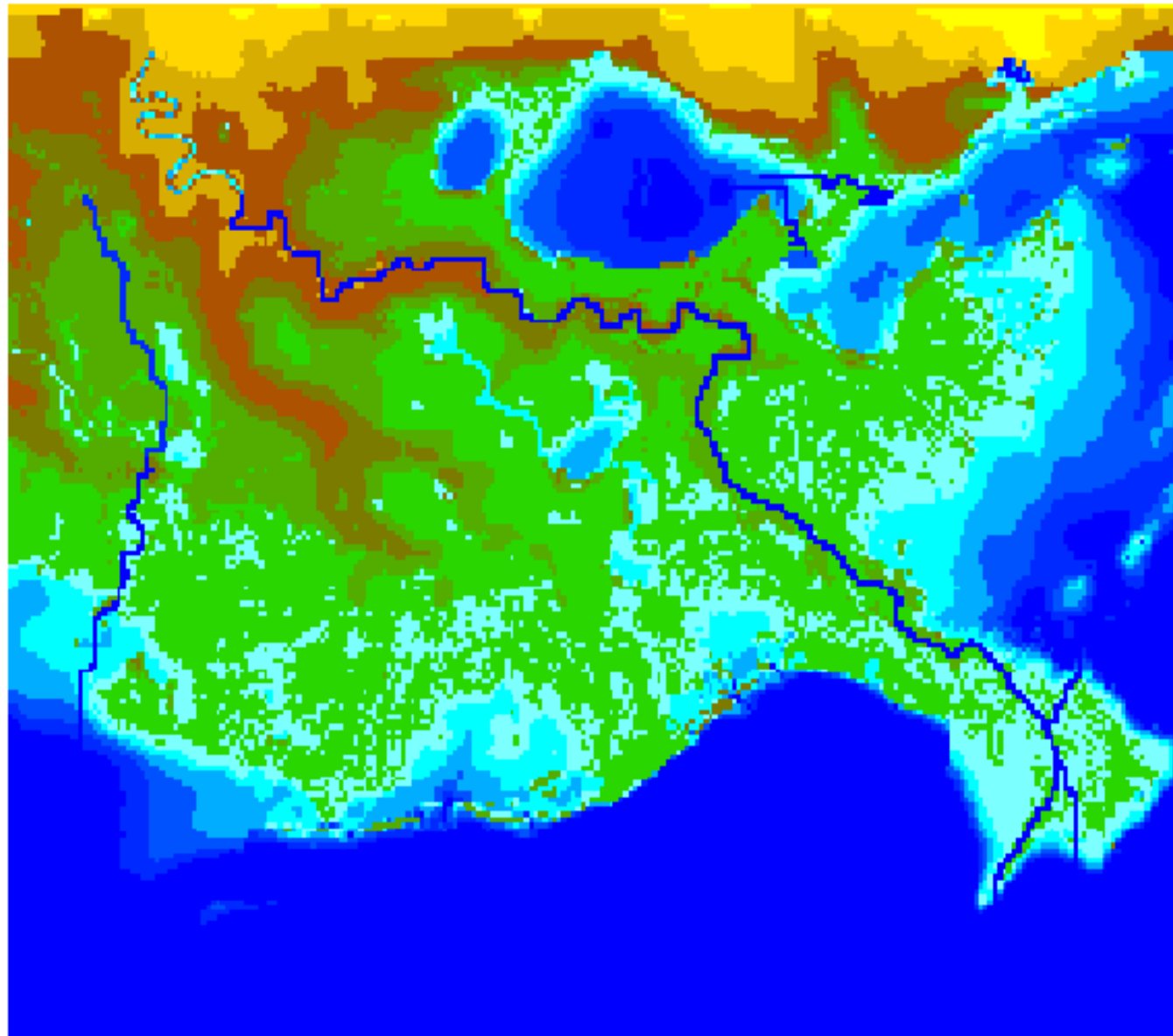
Legend

- > 18 ft Water
- > 16 ft Water
- > 12 ft Water
- > 8 ft Water
- > 6 ft Water
- > 3 ft Water
- > 0 ft Water
- > 0 ft Land
- > 2 ft Land
- > 4 ft Land
- > 6 ft Land
- > 8 ft Land
- > 10 ft Land
- > 12 ft Land
- > 14 ft Land

0 10 20
Kilometers

1993

Topography (1993 - Base)



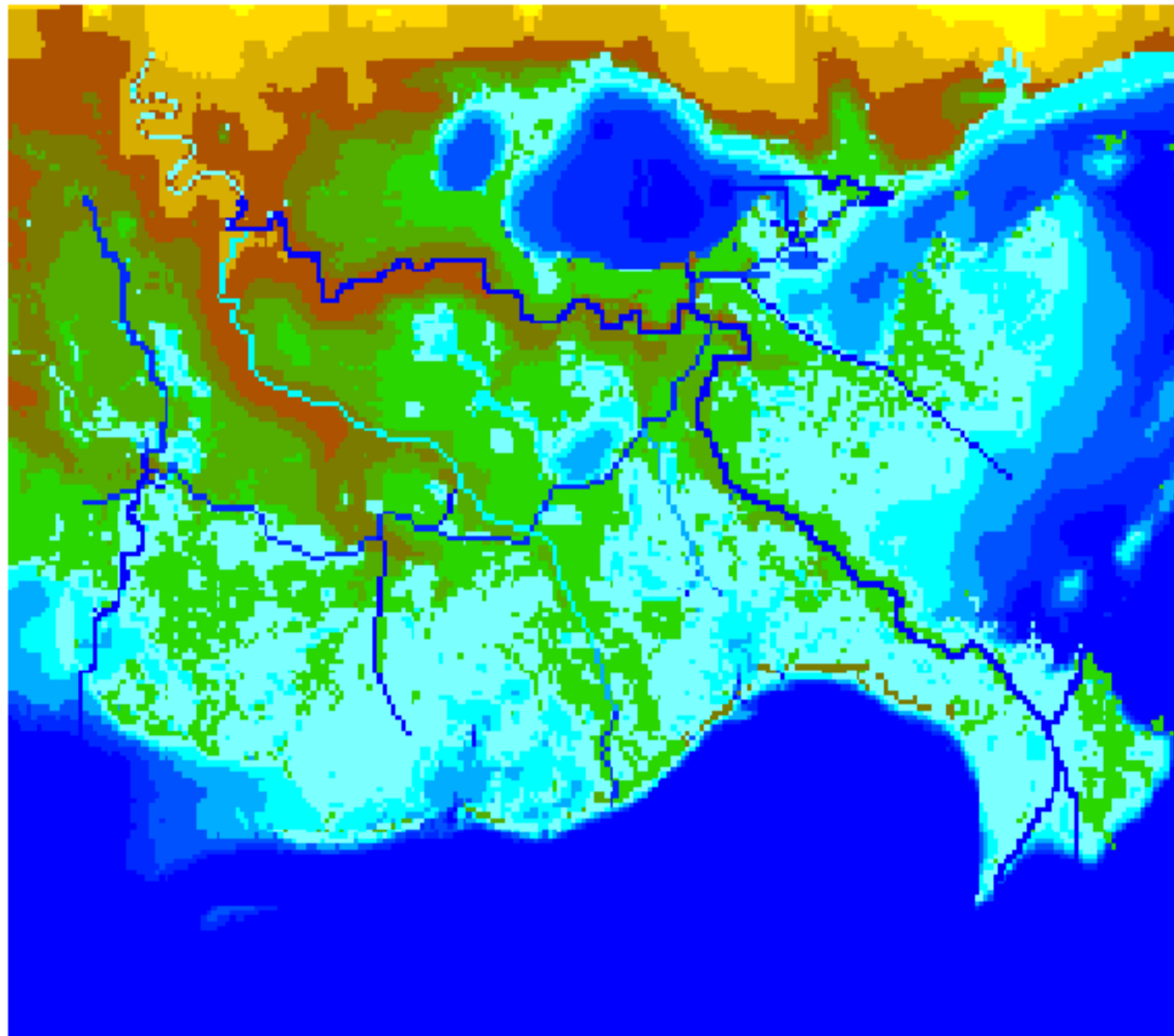
Legend

- > 18 ft Water
- > 16 ft Water
- > 12 ft Water
- > 8 ft Water
- > 6 ft Water
- > 3 ft Water
- > 0 ft Water
- > 0 ft Land
- > 2 ft Land
- > 4 ft Land
- > 6 ft Land
- > 8 ft Land
- > 10 ft Land
- > 12 ft Land
- > 14 ft Land

0 10 20
Kilometers

2020

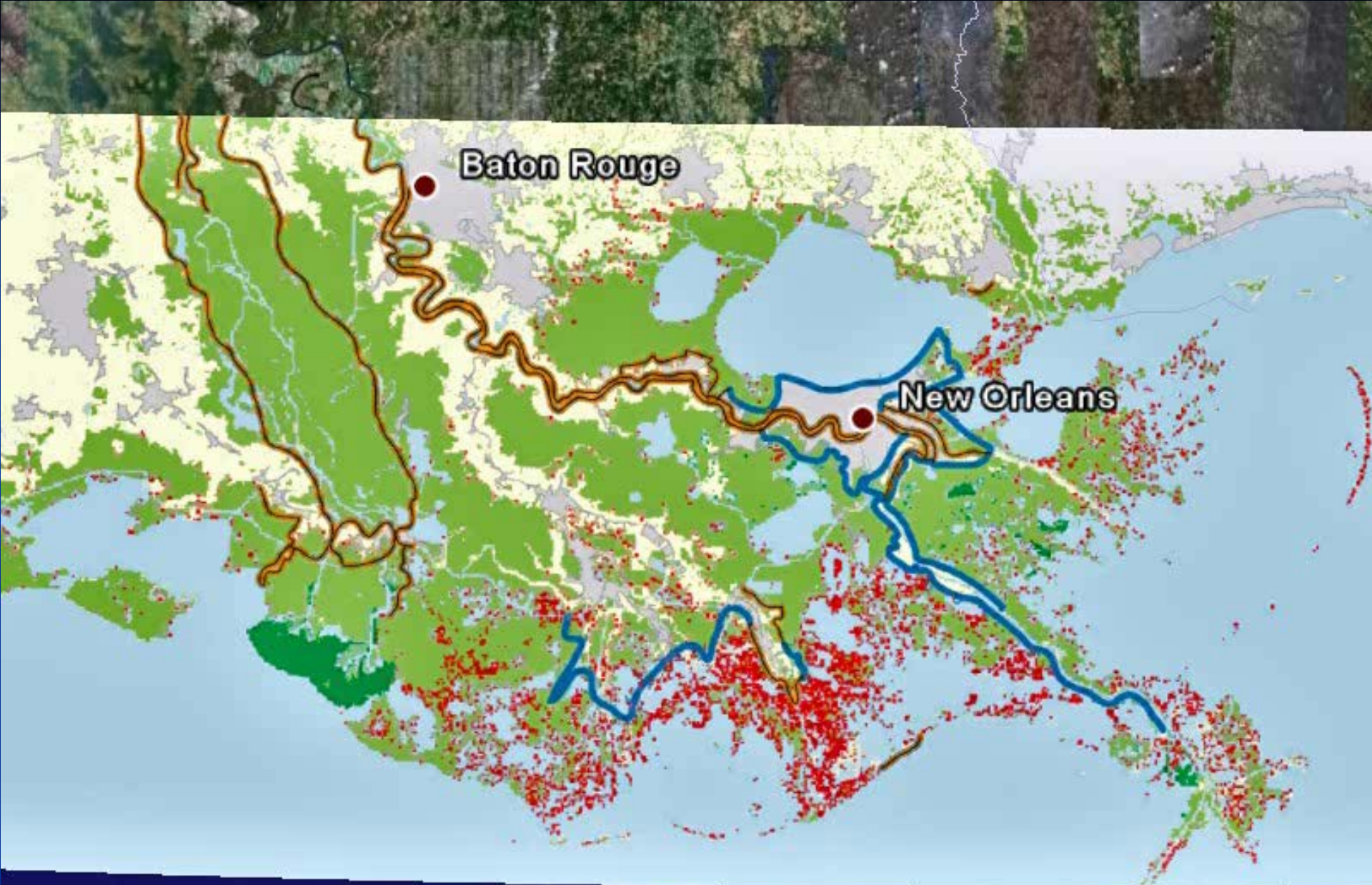
Topography (2020)



Legend

- > 18 ft Water
- > 16 ft Water
- > 12 ft Water
- > 8 ft Water
- > 6 ft Water
- > 4 ft Water
- > 0 ft Water
- > 0 ft Land
- > 2 ft Land
- > 4 ft Land
- > 6 ft Land
- > 8 ft Land
- > 10 ft Land
- > 12 ft Land
- > 14 ft Land

0 10 20
Kilometers



Baton Rouge

New Orleans



Baton Rouge

New Orleans

Baton
Rouge

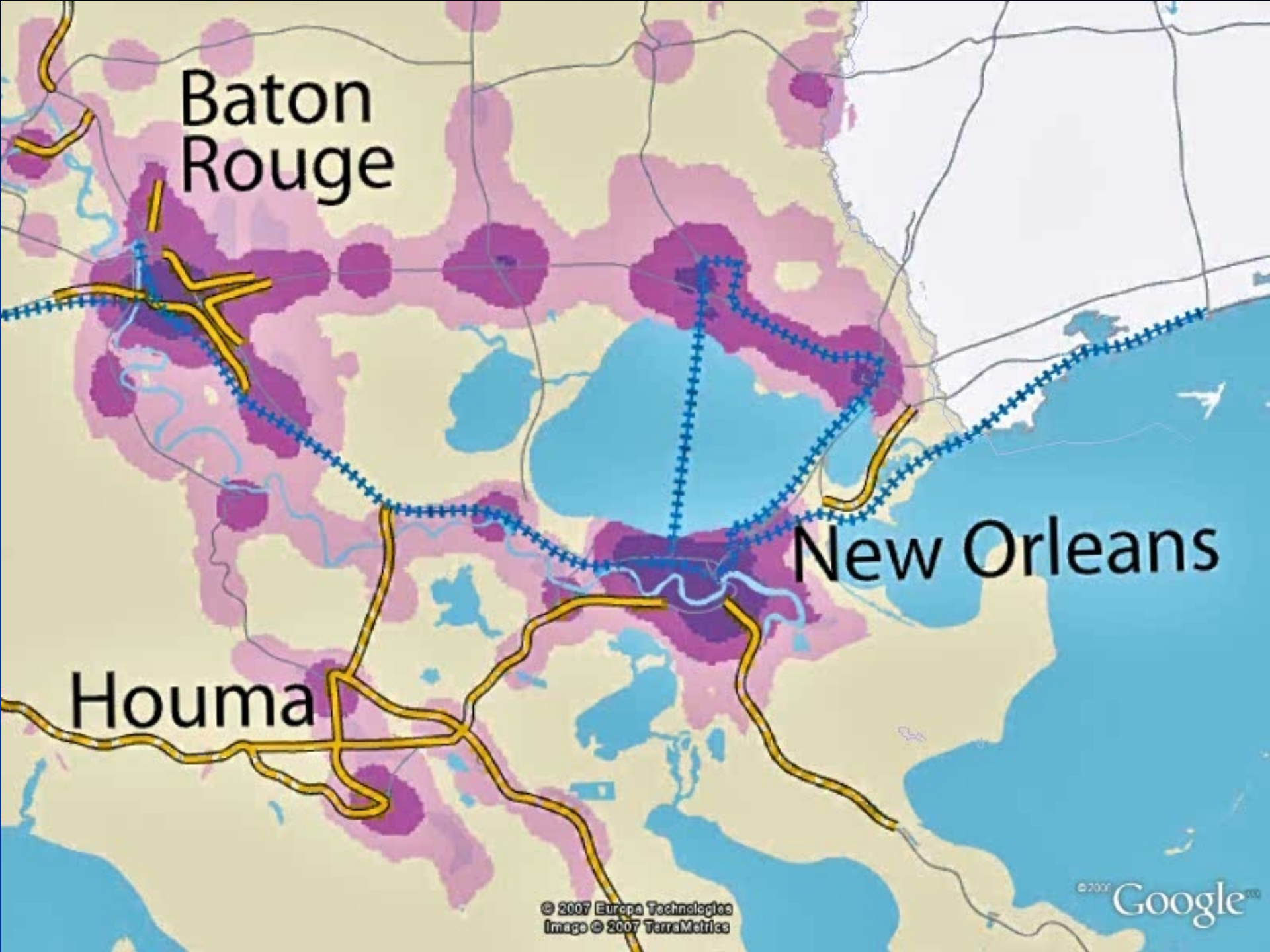
New Orleans

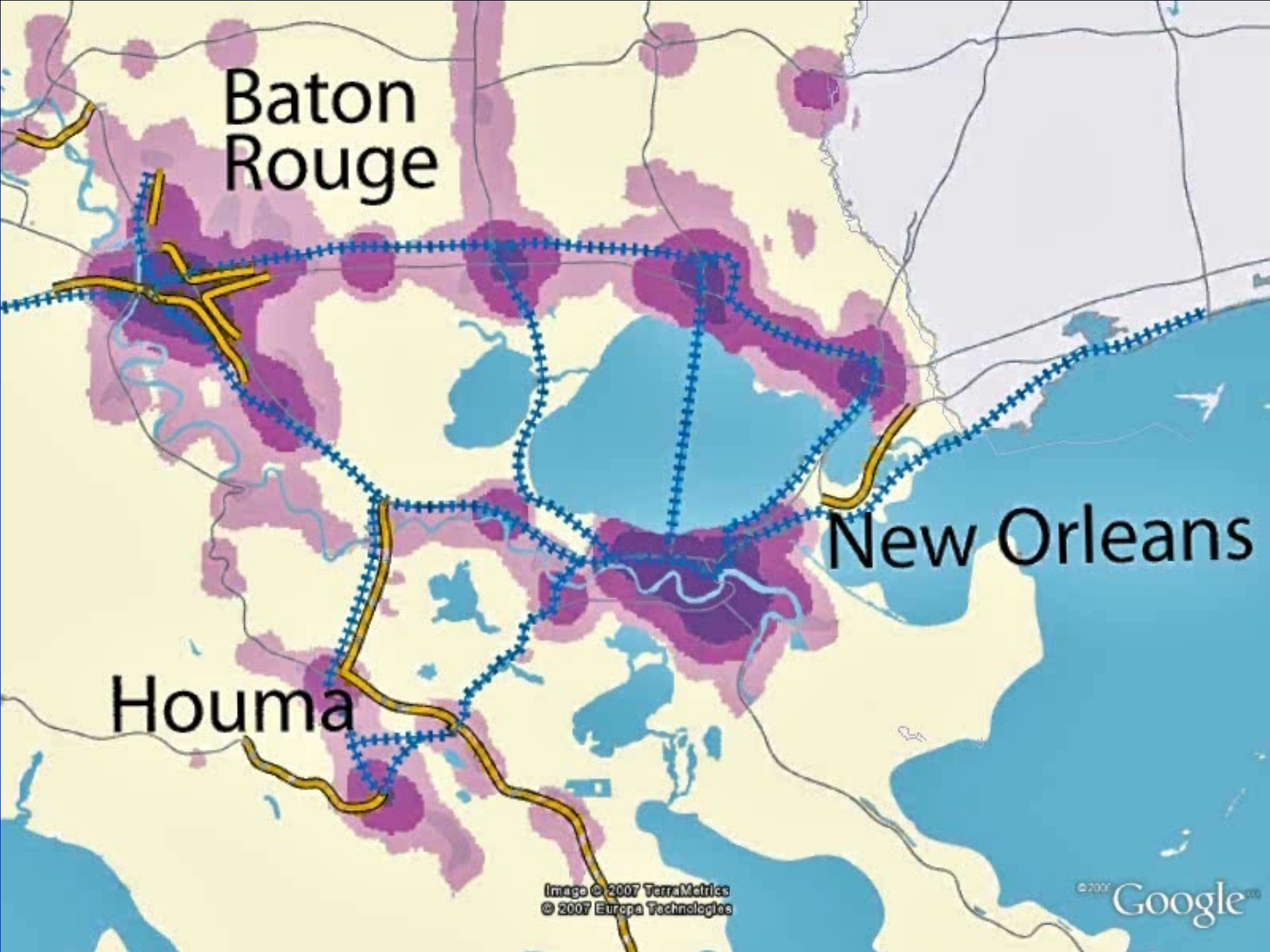
Houma

Baton
Rouge

New Orleans

Houma





Baton
Rouge

New Orleans

Houma

LOUISIANA SPEAKS

Our Voice. Our Plan. Our Future.



Quality Growth Strategy: The Envision Utah Approach (1997 – 1999)

- 150 Interviews with Key Leaders
- Over 200 Public Workshops
- 20,000 Utahns Evaluate 4 Scenarios
- Independent Polling
- Voluntary, Market-Driven
Recommendations Implemented by
Municipalities

Workshop #1

Where to Grow?

- What areas should be off limits?
- What areas are options for growth?
- How much land will be needed for future generations?



Workshop #2

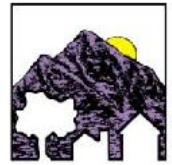
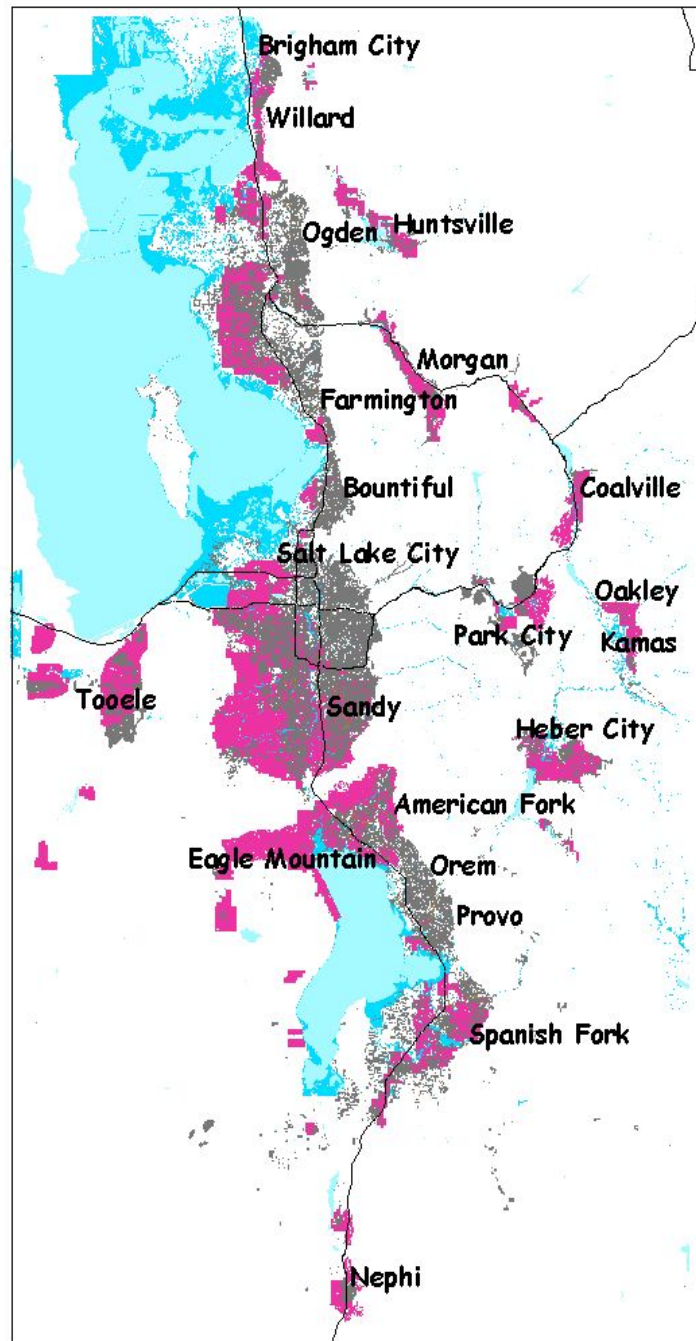
How to Grow?



Scenario A

New and Existing Development

- Continuation of Recent Trends
- Larger lot sizes
- More auto-oriented development will occur.



ENVISION UTAH
A Partnership for Quality Growth

Scenario A

- Freeways
- New Development
- Existing Development
- Water Bodies
- Wetlands & Floodplain

Fregonese
Calthorpe
Associates

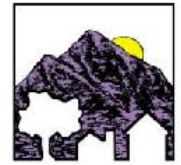
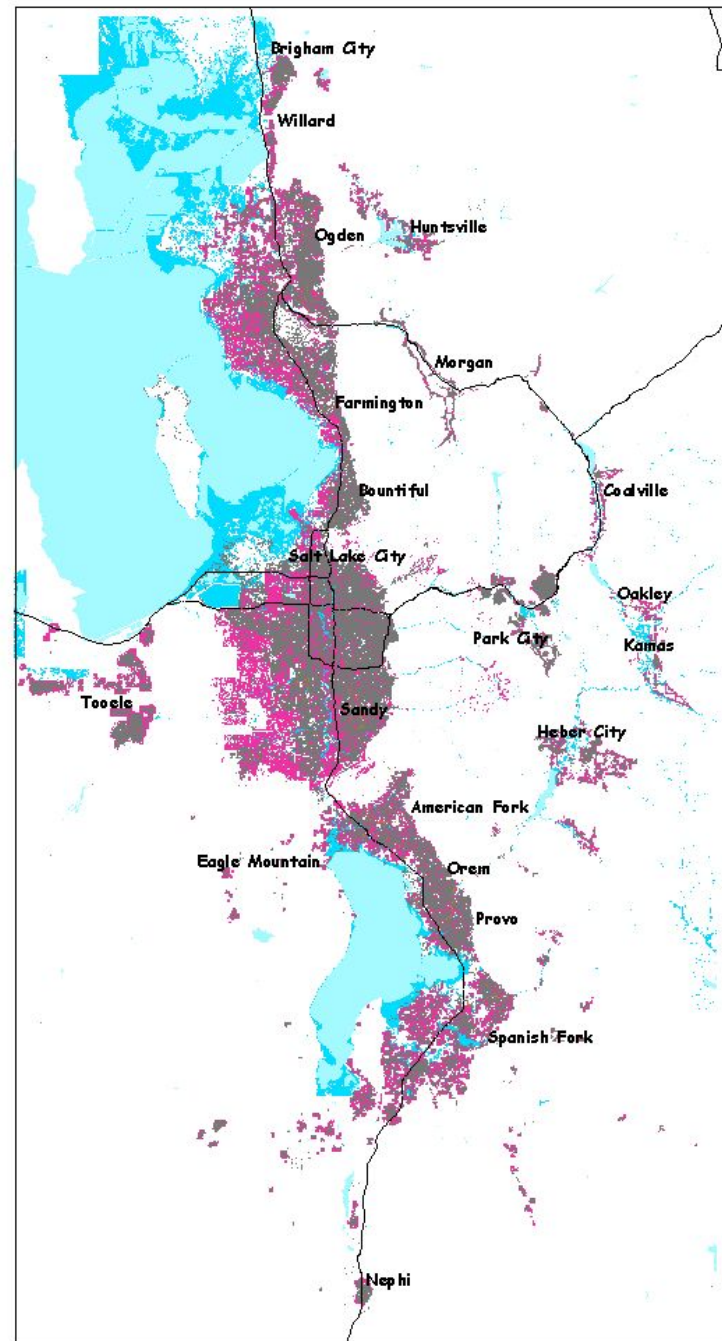
Regional and Urban Planning



Scenario B

New and Existing Development

- Baseline - implement adopted plans
- Dispersed development pattern common in last 20-30 years



Scenario B

Freeways

New Development

Existing Development

Water Bodies

Wetlands & Floodplain

Fregonese
Calthorpe
Associates

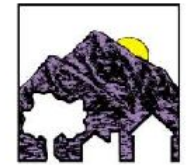
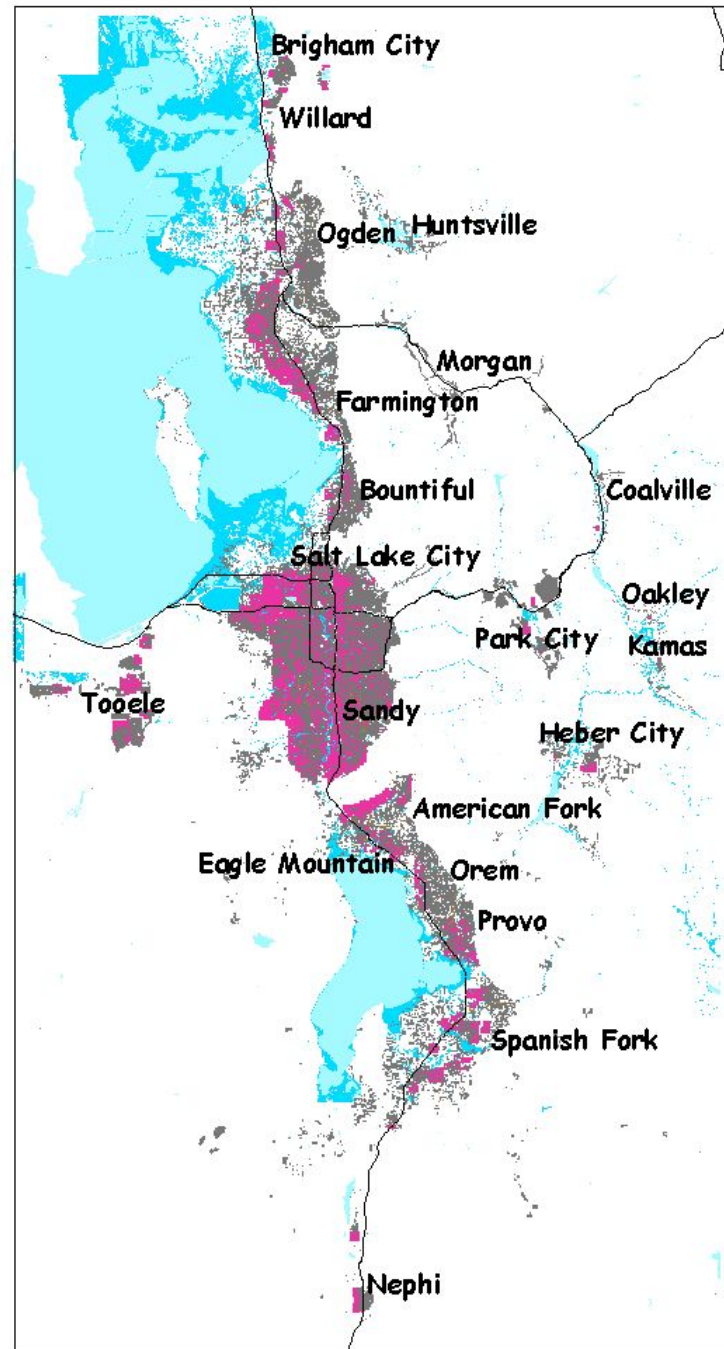
Regional and Urban Planning



Scenario C

New and Existing Development

- More infill and redevelopment
- Growth on new land focused into walkable, transit-oriented communities



ENVISION UTAH
A Partnership for Quality Growth

Scenario C

Freeways

New Development

Existing Development

Water Bodies

Wetlands & Floodplain

Fregonese
Calthorpe
Associates

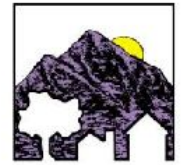
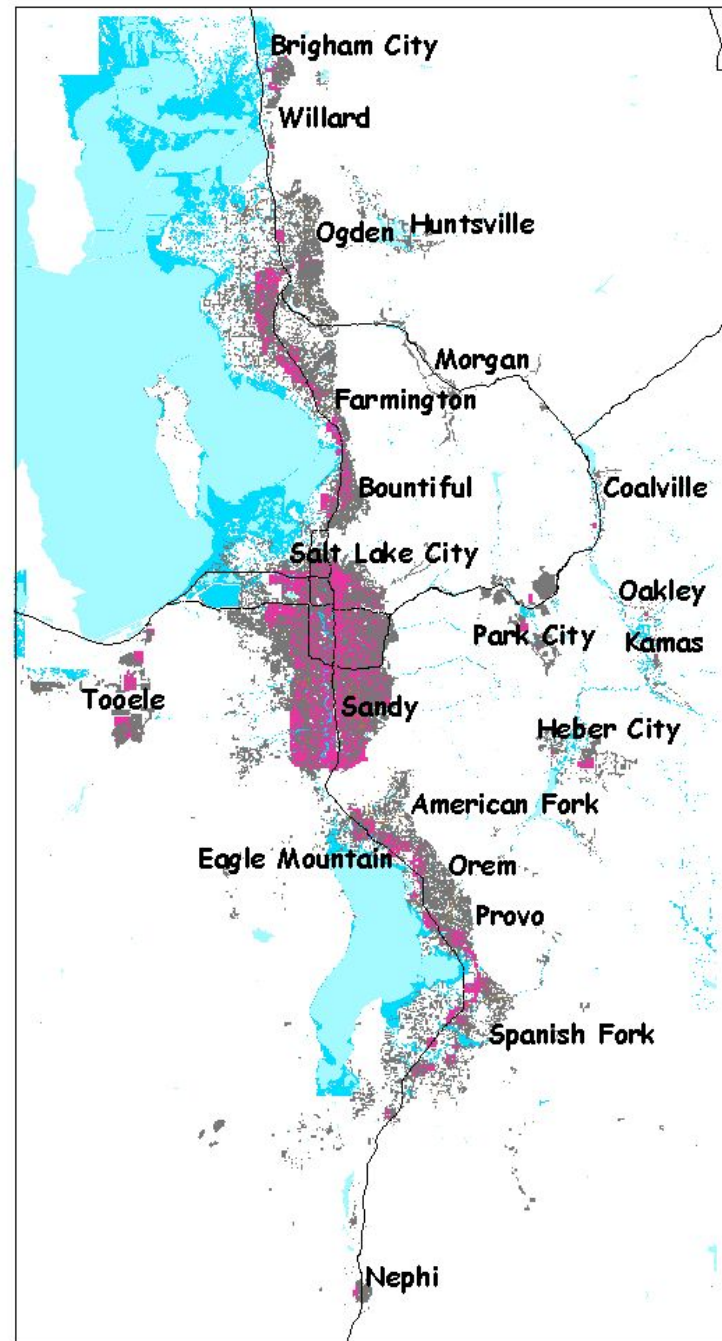
Regional and Urban Planning



Scenario D

New and Existing Development

- Significant increase in densities
- Extensive infill and redevelopment
- Extensive transit system



ENVISION UTAH
A Partnership for Quality Growth

Scenario D

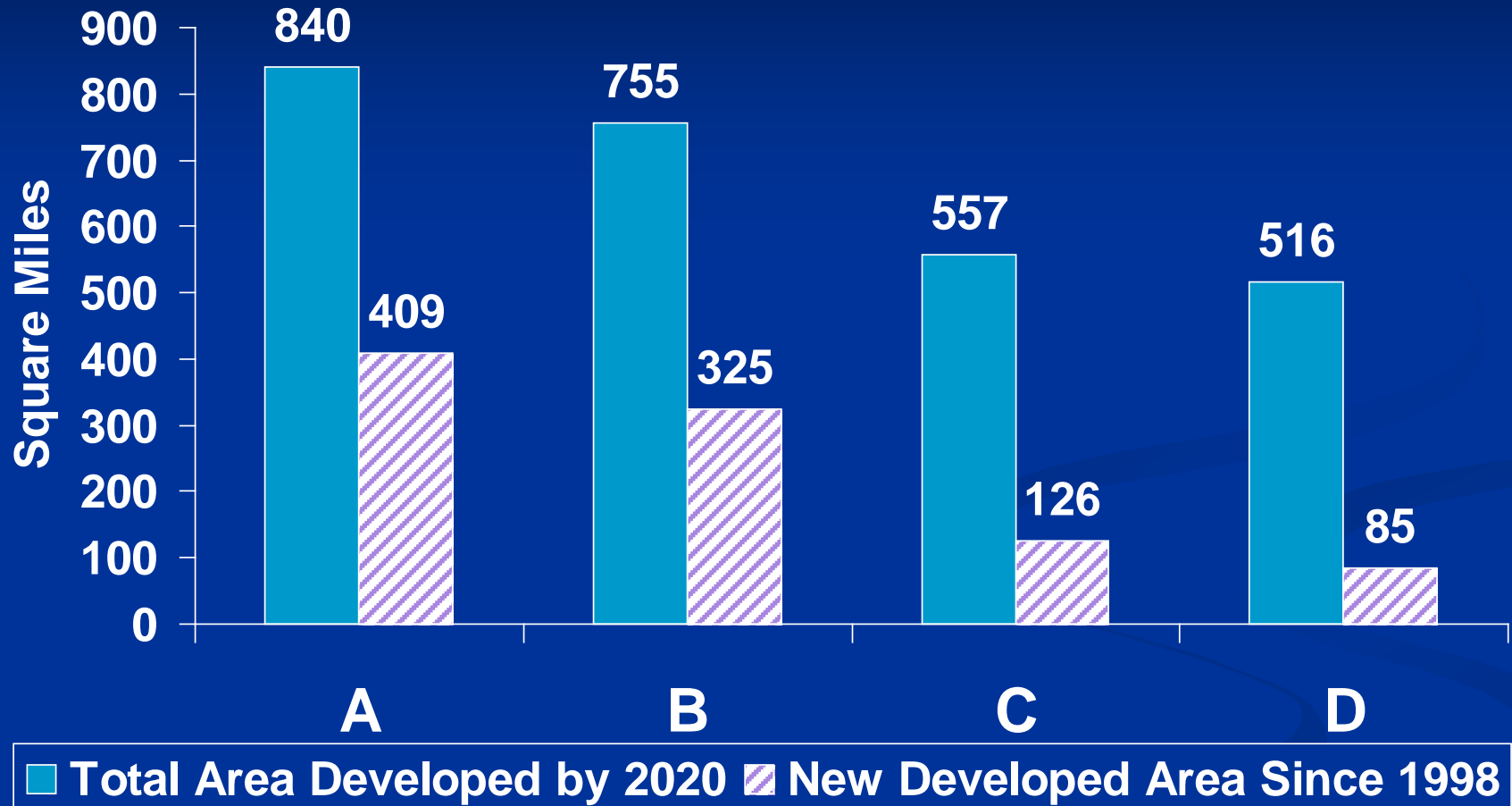
- Freeways
- New Development
- Existing Development
- Water Bodies
- Wetlands & Floodplain

Fregonese
Calthorpe
Associates

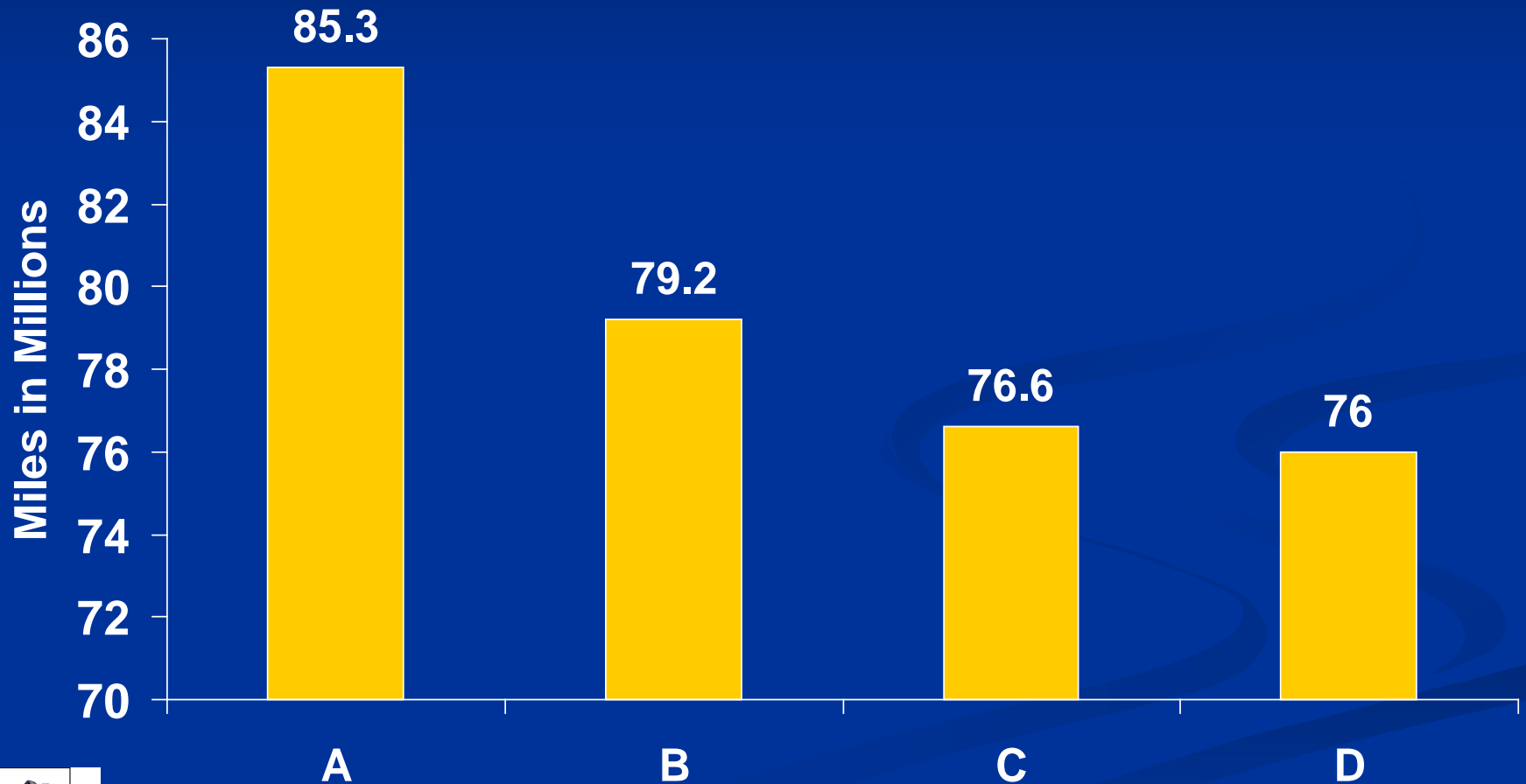
Regional and Urban Planning



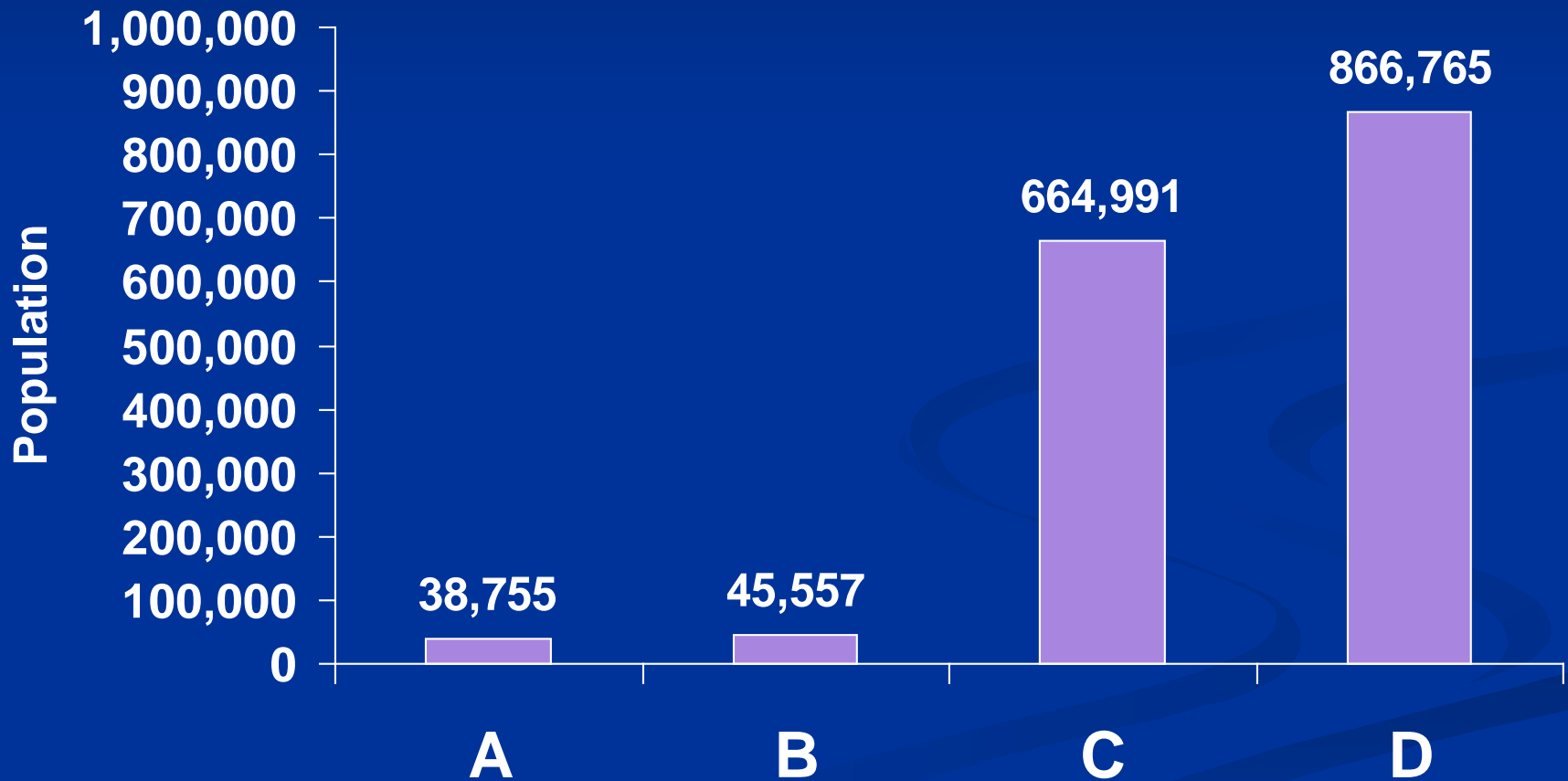
Land Consumption



Vehicle Miles of Travel Per Day

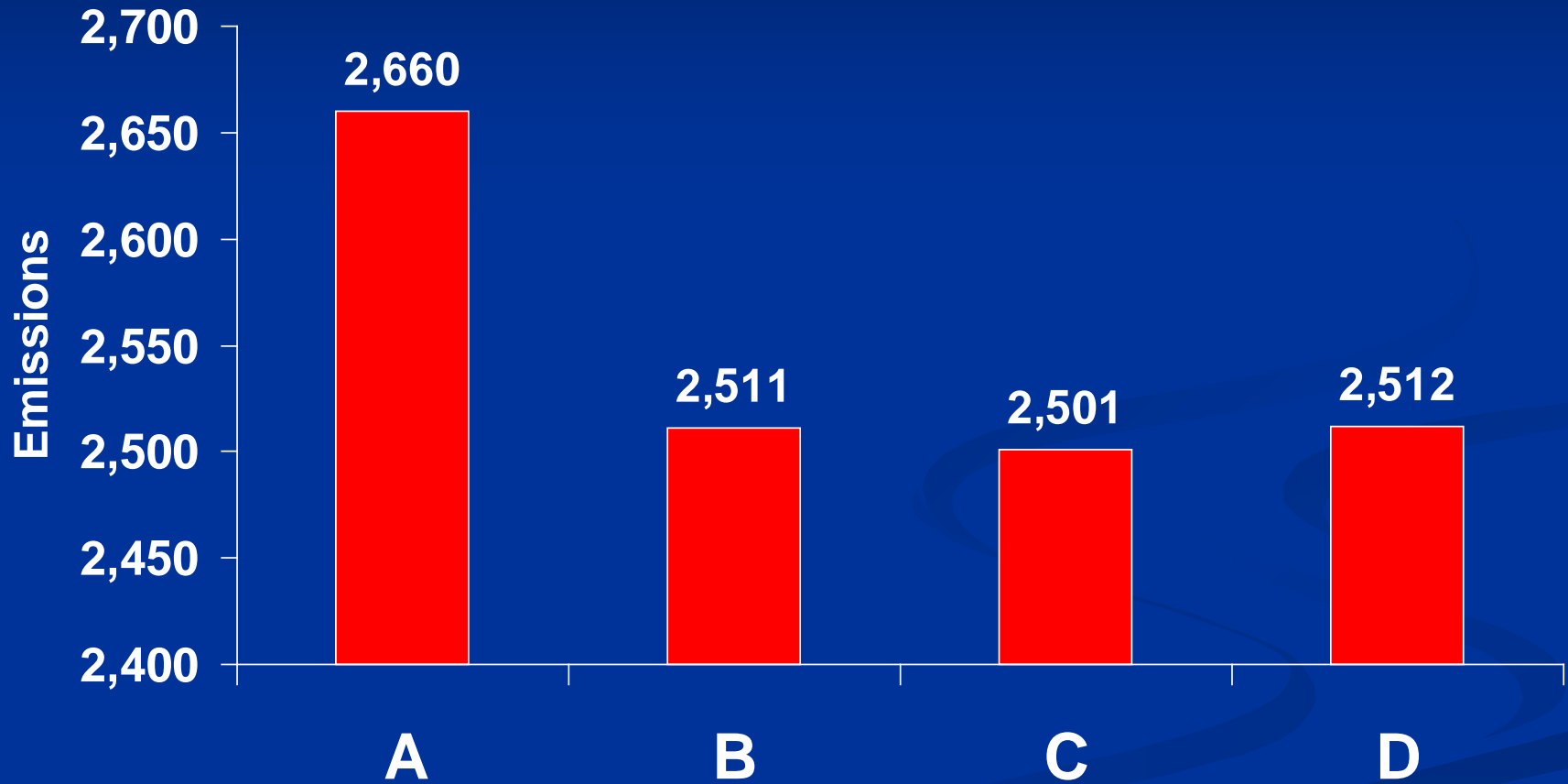


Population Within 1/2 Mile of Rail Transit: 2020

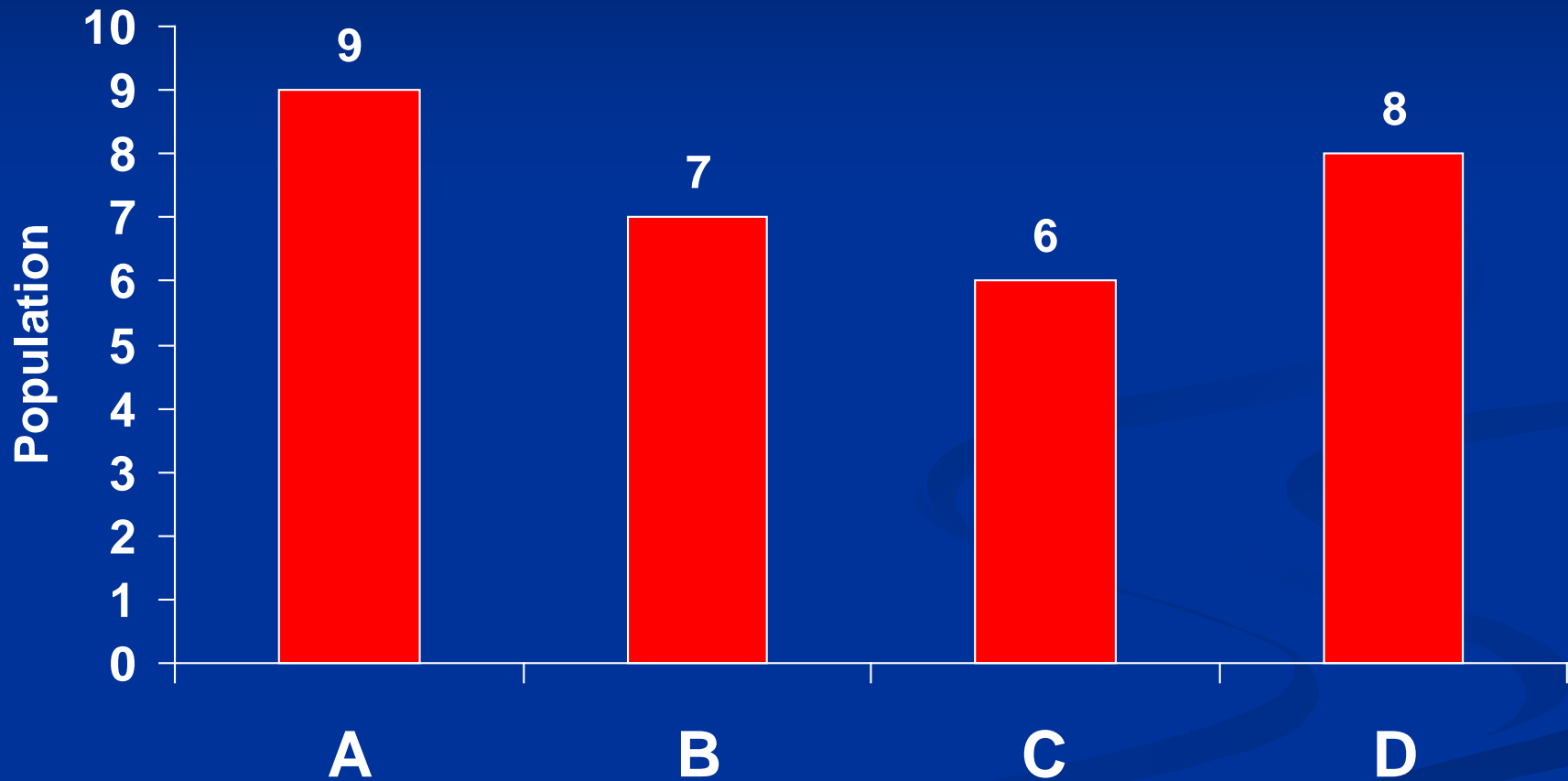


Total Emissions

Tons Per Day

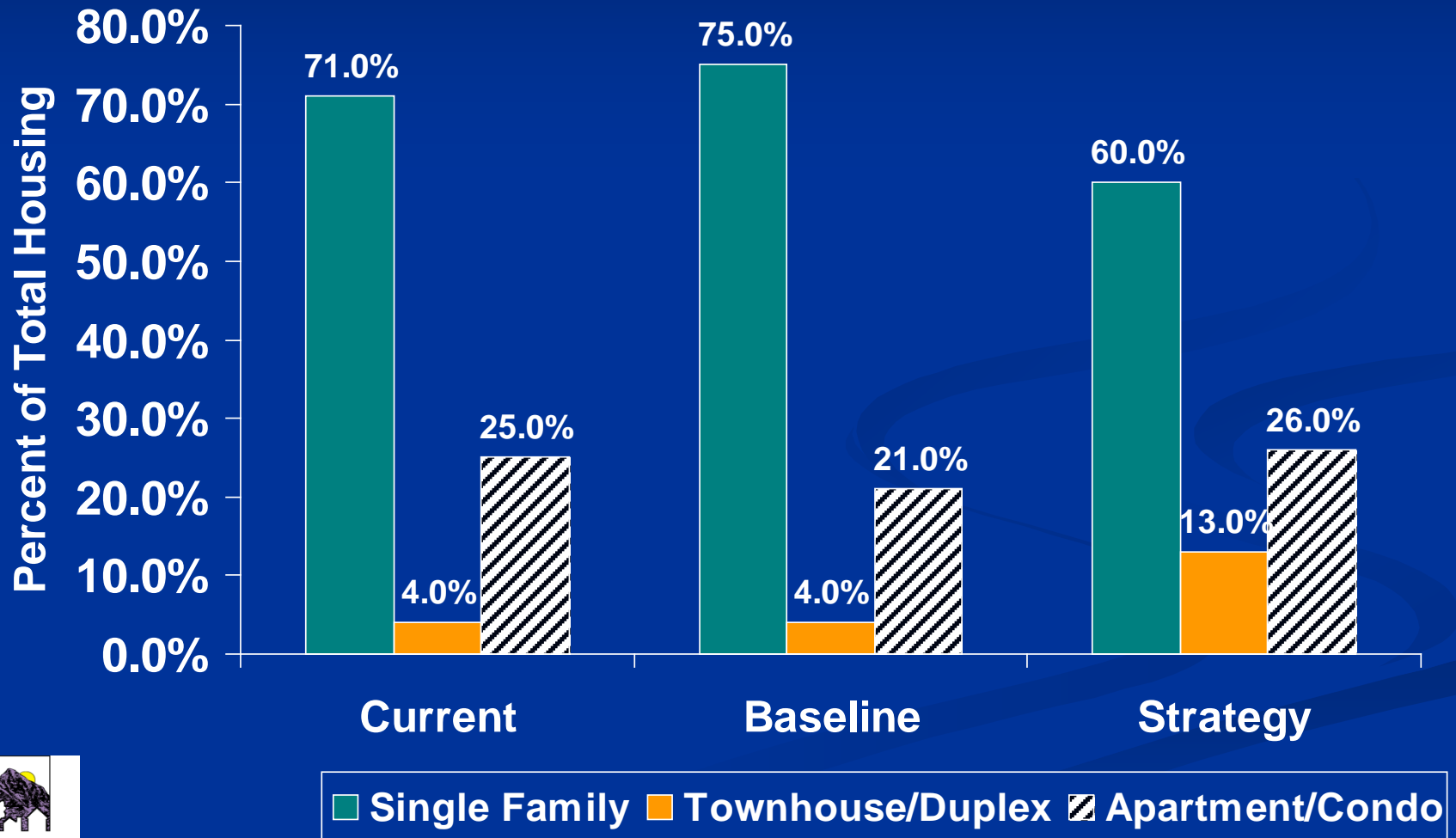


Overall Air Quality Score

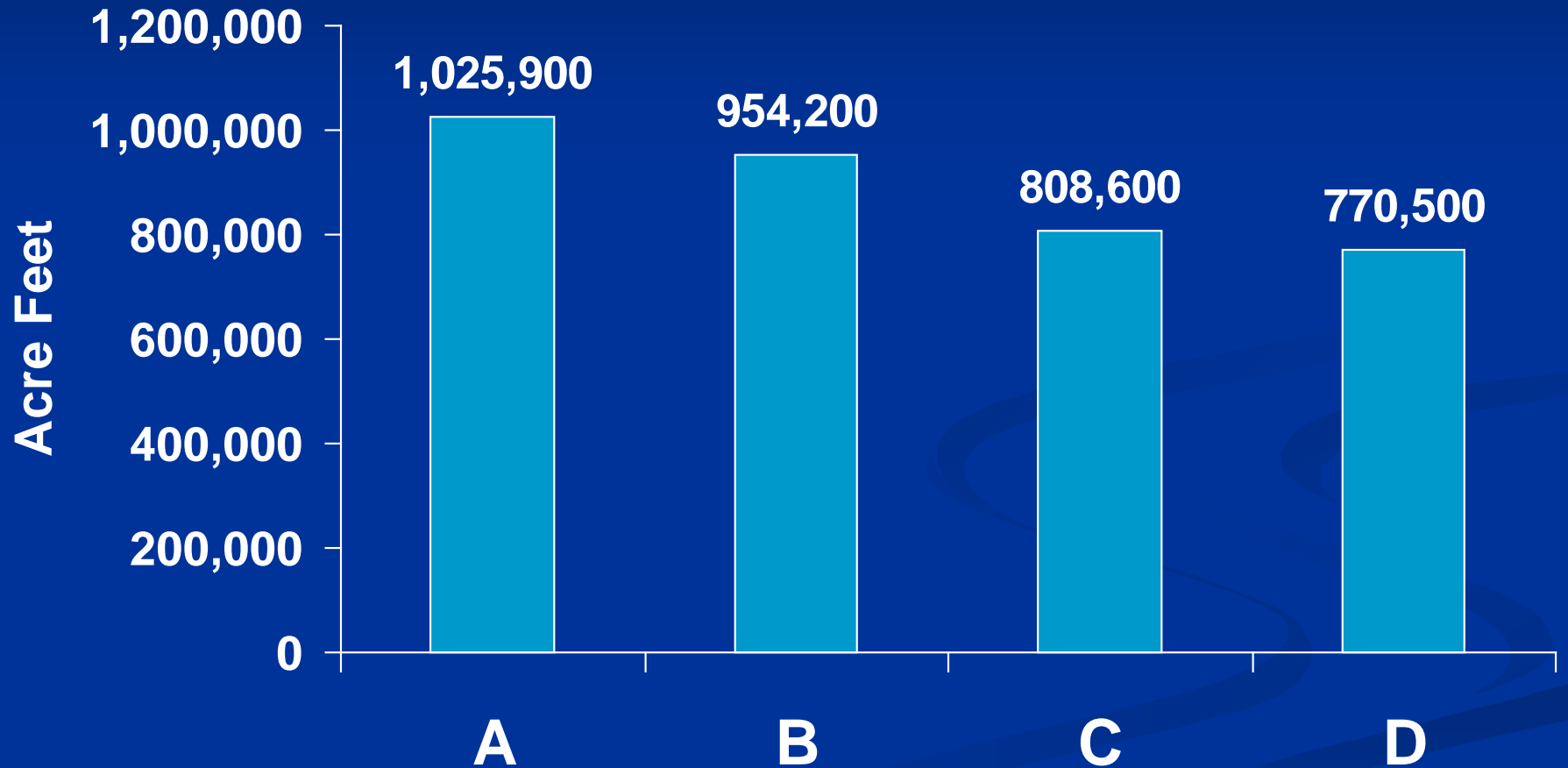


The score is an overall, generic measure of air quality conditions. A higher score signals worse air quality conditions. The score indicates an ordinal ranking of air quality among the scenarios.

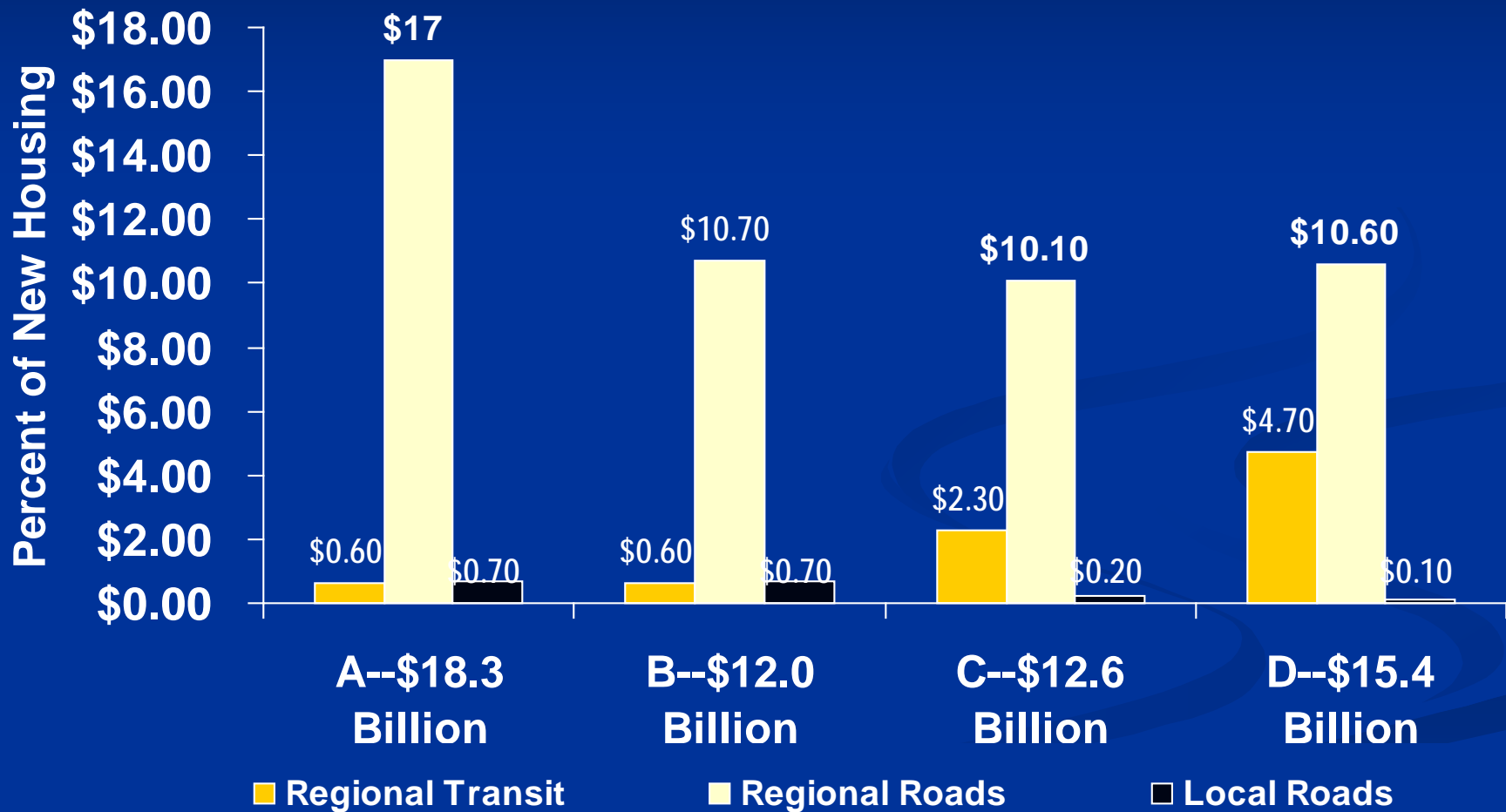
Housing Mix: Current and 2020



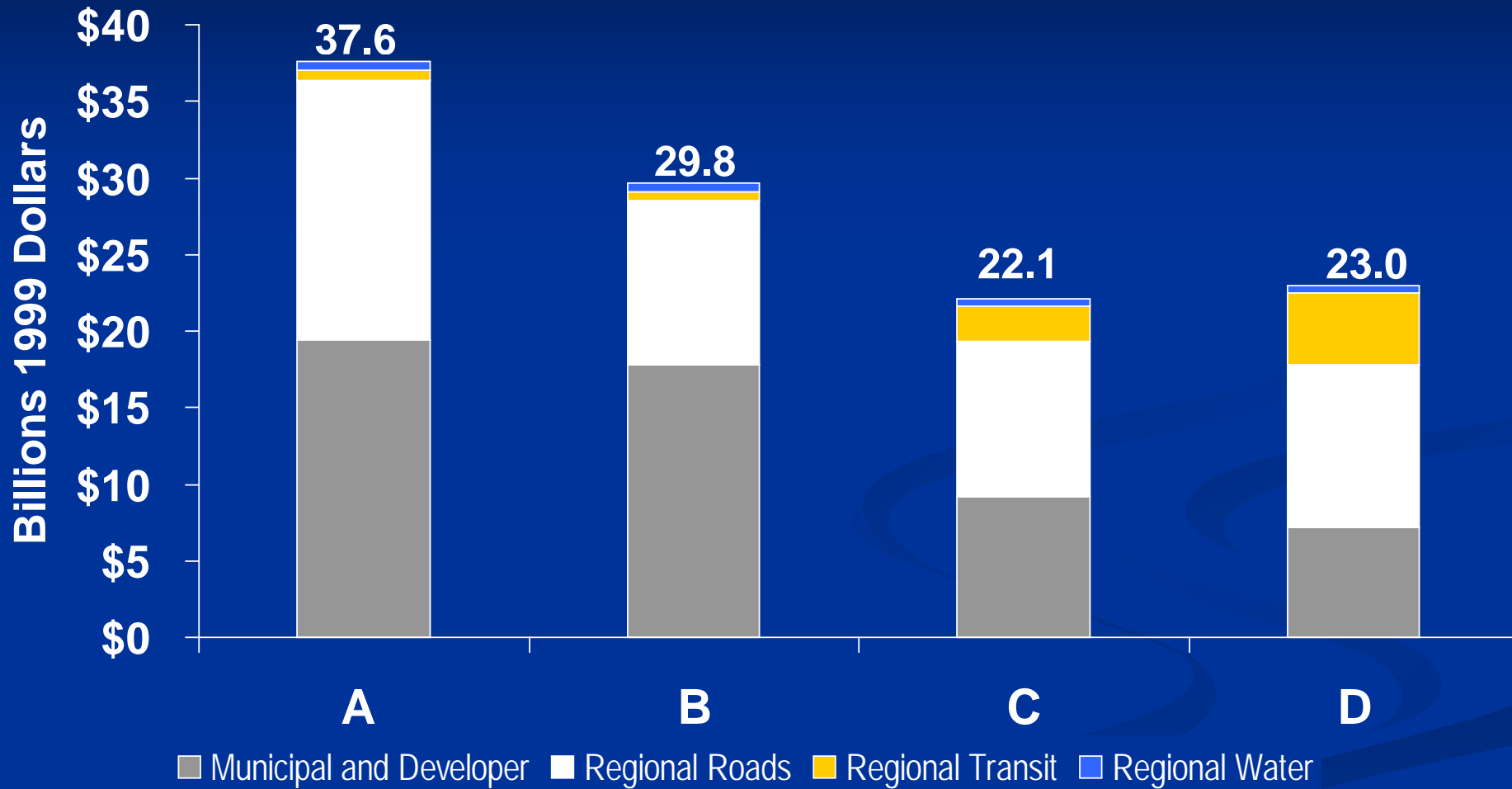
Water Demand: 2020



Transportation Investment



Total Infrastructure Costs



PUBLIC AWARENESS EFFORTS

Television, Radio and Newspaper



Let's start today creating more regional public transportation choices

*that will help maintain quality of life for us,
our children and grandchildren*

MORE INFO TODAY
CHANNEL 5 - 11:30 A.M.

More Choices for people from every walk of life

While most of us will continue to drive automobiles, the region will benefit from a more convenient and reliable public transportation system that will give us all more choices and options, more freedom and mobility, and provide more opportunities for people from every walk of life to get to and from work, shopping and recreation. A system can include commuter rail, light rail, lower cost self-powered rail, private vans and buses, and more bus routes with more frequent service. Your locally elected officials have developed a long-term region-wide plan to create a balanced public transportation system that will accommodate residents throughout the Greater Wasatch Area, but additional funds and citizen involvement will be necessary.

Investing today saves money

A region-wide public transportation system is a key Envision Utah strategy, which as part of a package of strategies, can help preserve our quality of life and can save the region 4-1/2 billion dollars over the next 20 years, as well as reduce personal transportation costs to those using the system.

Opportunities will be lost and expenses will go up if we fail to move forward now

With the addition of another million people by 2020, land will become more scarce and places to build new roads or rights of way for public transportation will become more expensive and difficult to find. Increasing the capacity of rail transit is more cost effective and uses less land than adding additional lanes to our roads and highways. Developing a region-wide public transportation system can help take the pressure off critical lands we wish to preserve.



Source: Utah Dept. of Transportation

High-Speed Rail
along the Wasatch Front



Cars, buses, & rail modes of our future transportation

Benefits the economy and quality of life

The benefits go beyond transportation choices. Developments for housing, shopping, work, recreation and cultural amenities can economically and aesthetically enhance key sites adjacent to public transportation routes. Communities that provide convenient and reliable public transportation exhibit a vitality that gives them a competitive edge in capturing economic development and in attracting and retaining businesses and workers. A region-wide public transportation system also benefits non-riders by reducing the increase of congestion and time spent in traffic, resulting in more time to spend with family and friends. In addition, it helps reduce mobile emissions released, which will help keep Utah's air clean.

It's up to you!



Passenger boarding commuter rail

Learn more
about these
and other
Envision Utah
strategies
today
11:30 A.M. ON
KSL/CNN CHANNEL 5

ENVISION UTAH
A Partnership for Quality Growth
www.EnvisionUtah.org

Facts and Information

Envision Utah's Quality Growth Strategy through the year 2020



Population Centers and Critical Land

- Population Centers
- Rail Transit
- Critical Land
- Public Land & Recreation Area
- Forest
- Water
- Watershed & Waterscape
- Developed Area

ENVISION UTAH'S QUALITY GROWTH STRATEGY IDENTIFIES SIX PRIMARY GOALS

- Increase mobility and transportation choices
- Enhance quality
- Preserve critical lands
- Conserve and maintain the availability of water resources
- Provide housing opportunities for a range of family and income types
- Maximize efficiency in public and infrastructure investments

The Wasatch Front Regional Council and the Metropolitan Association of Governments (your local elected officials) have in place a 20-year long-range transportation plan that includes major improvements to our region's public transportation system.

The implementation of Envision Utah's Quality Growth Strategy, which includes providing a region-wide transportation system, will reduce travel time between points by 10-15 minutes over the next 20 years. This translates into a regional road, approximately \$0.5 billion savings in regional travel time, an additional investment of \$1.5 billion in public transportation costs, quality growth efficiency, and 20 million in savings in other infrastructure costs. Quality Growth Efficiency (GGE) is a concept developed by the Governor's Office of Planning and Budget.

In a pilot conducted in Salt Lake, Davis, and Weber Counties, 90% of residents favor the expansion of the public transportation system, including the expansion of light rail, building commuter rail, increased bus service, vanpooling and telecommuting. (Salt Lake and Davis Survey, July 10-22, 2000)

Envision Utah's Quality Growth Strategy shows that through the implementation of a region-wide public transportation system, accompanied by changes in land use patterns, 171 million miles less will be driven compared to urban use over the 20 years compared to baseline projections. This also

allows for the conservation of 110 square miles of agricultural land.

According to information gathered from the Wasatch Front Regional Council, once a facility is in place, either rail or highway, it costs approximately 20% of the total cost to build the capacity of the rail transit, but costs 100% of the total cost to build the capacity of the highway.

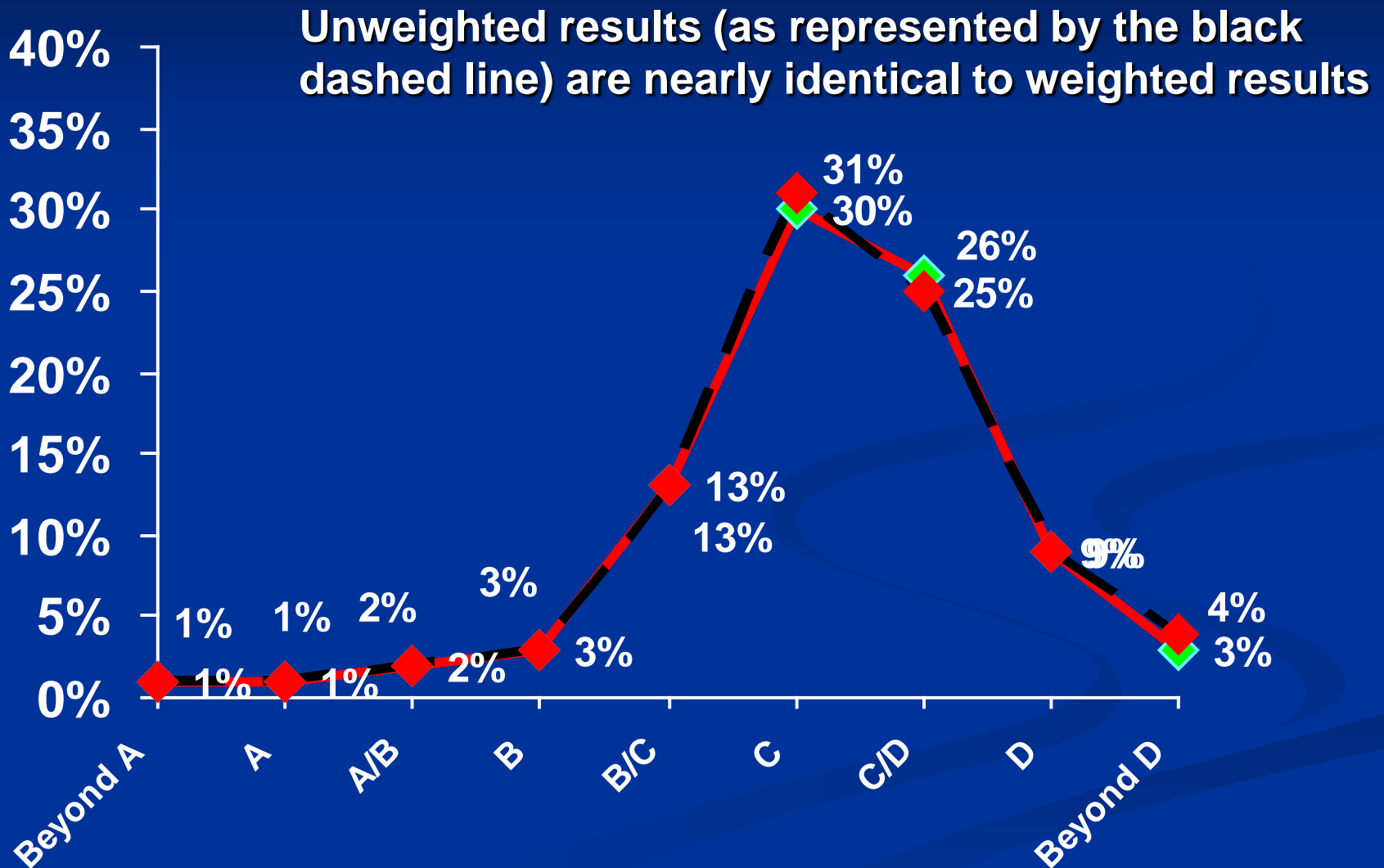
Some \$2.4 billion worth of investment has occurred since the 1970s to build the area's decision to build. (Utah in the Heart of America, by Mark, Portland Oregon, September, 1998)

A 1998 Texas Transportation Institute Report on congestion stated that between 1980 and 1994, the Salt Lake Area experienced the greatest growth in congestion in the country. Since 1980, congestion in Utah road has increased by over 50%.

GGE's transportation modeling for Envision Utah's Quality Growth Strategy resulted in a reduction in vehicle miles traveled of 1.4 million per day. At the same time, average speeds increased by 12.0%, vehicle times reduced by 5.2%, travel time increased by 27.0%, and total emissions were reduced by 3.5 percent, a total of 83 tons per day due to a reduction in mobile emissions of 7.3 percent. This reduction is a result of more transit trip, shorter trip times, and higher average peak speeds.

Choosing a Scenario

(Weighted vs. Unweighted Results)



QUALITY GROWTH STRATEGY

Six Goals, 42 Strategies

- Enhance Air Quality
- Increase Transportation Choices
- Preserve Critical Lands
- Conserve Water Resources
- Provide Housing Opportunities
- Maximize Efficiency in Public Investments

Development Types

Non-Walkable

- Low Density Residential
- Industrial, Office Activity Center

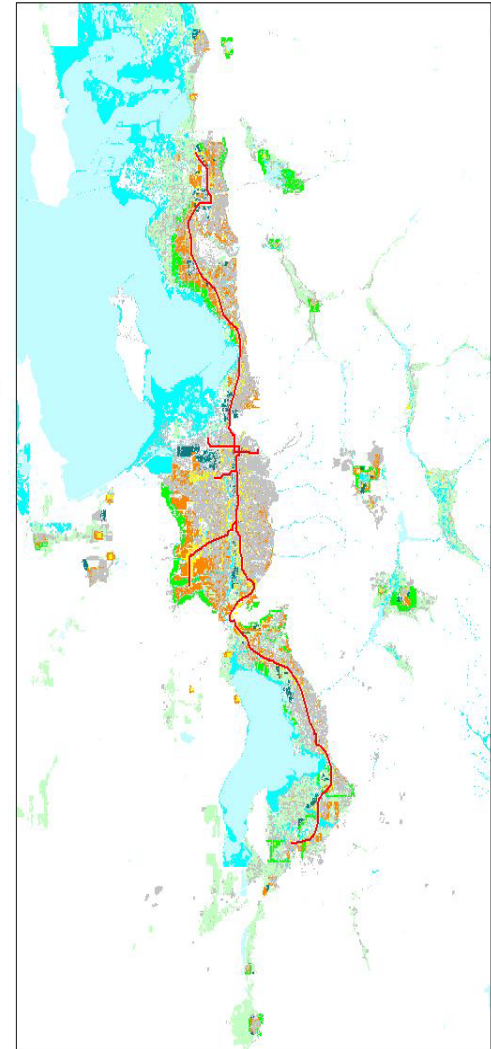
Walkable

- Town and Village
- Downtown

Open Space

- Rural Cluster

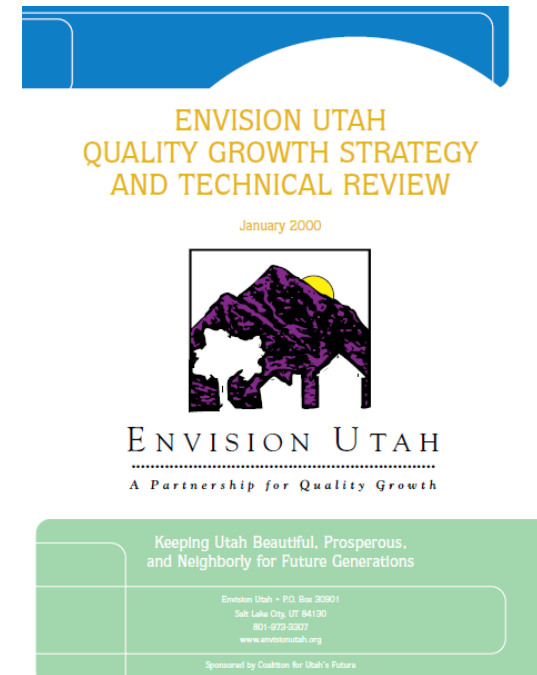
- Rail Transit



Growth Strategy Implemented

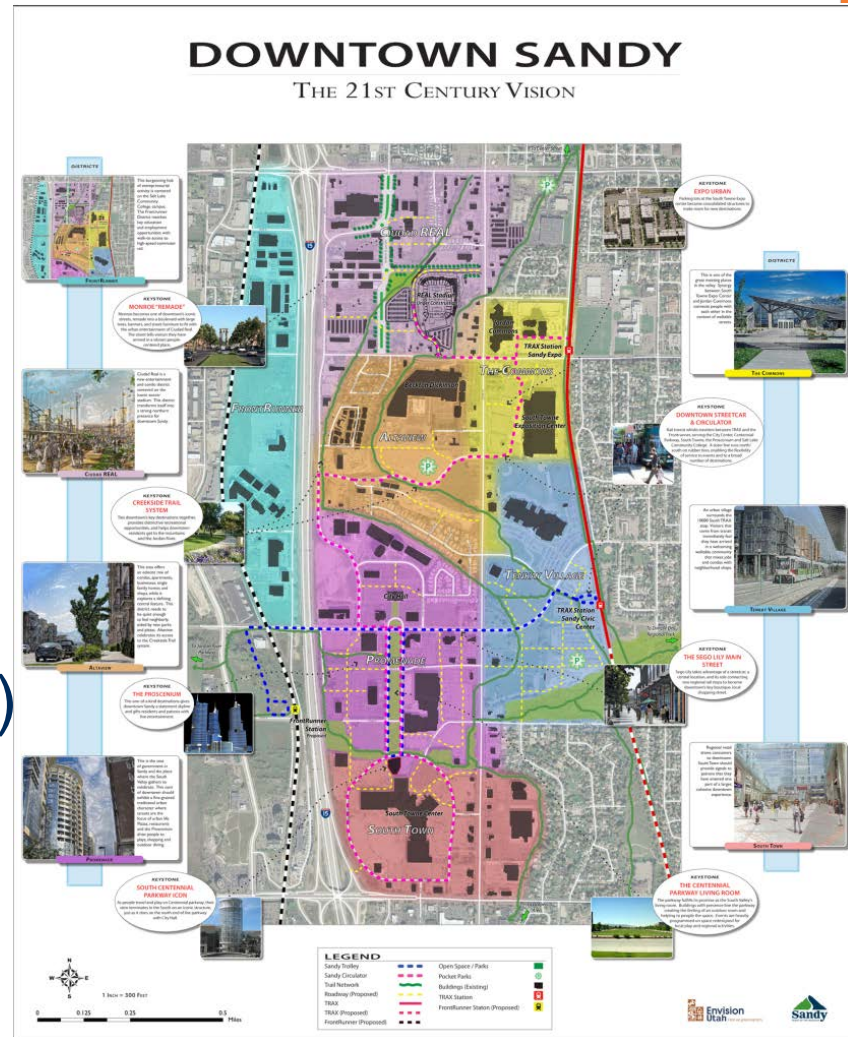
- ❑ Saves \$4.5 billion in future infrastructure costs over the next 20 years
- ❑ Conserves more land (171 square miles)
- ❑ Provides more housing choices
- ❑ Lowers emissions resulting in less pollution
- ❑ Reduces water consumption
- ❑ Makes our transportation system more efficient with less congestion on the roads

(Source: GOPB)



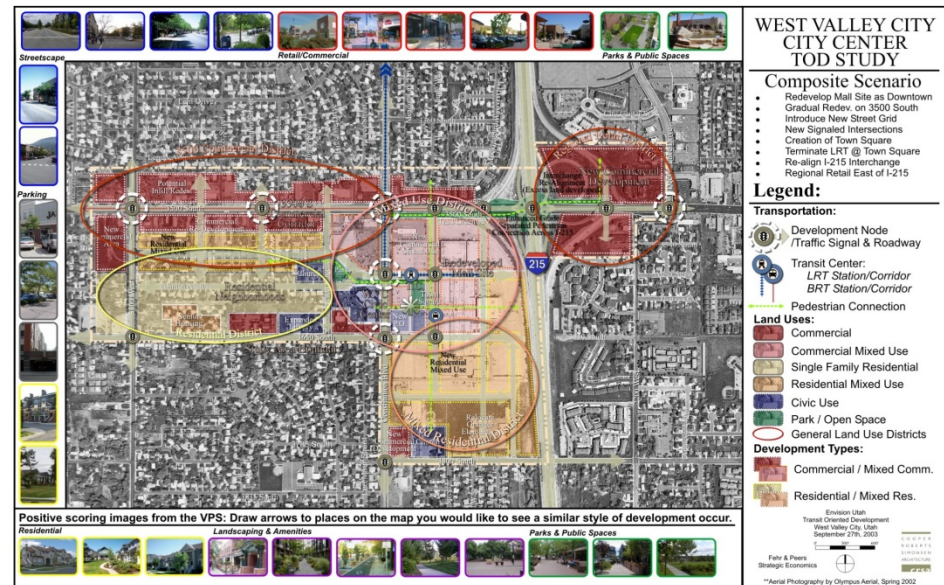
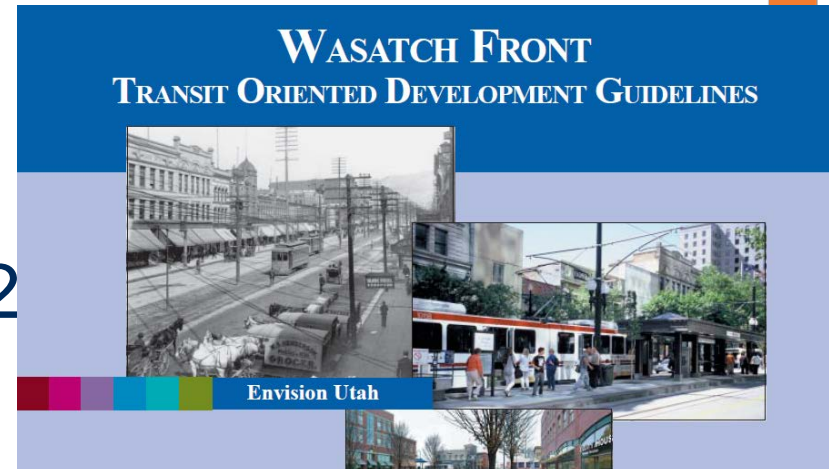
Over 40 Local & Regional Visioning Efforts

- Brigham City (1999)
- Centerville (1999)
- Midvale (1999)
- Salt Lake City (1999)
- Provo (1999)
- Ogden (2000)
- Perry City (2004)
- Millcreek (2004)
- West Valley City (2004)
- Bountiful City (2006)
- Sandy City (2008)



Transit Development & Land-Use Plans

- Layton (2002)
- Murray (2002)
- South Salt Lake (2002)
- West Jordan (2002)
- West Valley (2003)
- Sandy (2005)



NEBO Vision (2001)

- 10 cities, 1 county



2001

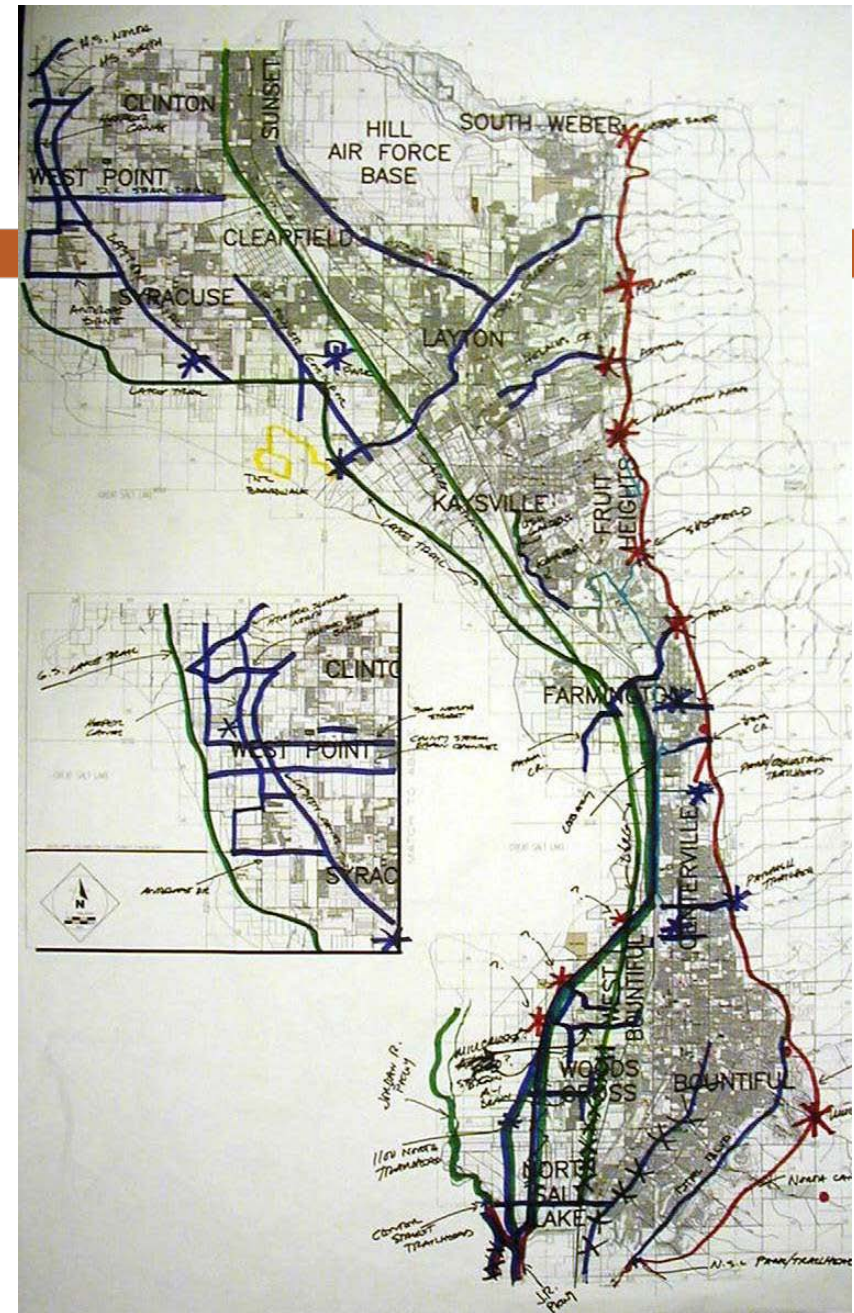


NEBO
Community Vision

*Springville, Mapleton, Spanish Fork,
Salem, Woodland Hills, Elk Ridge,
Payson, San Juan, Genola, Goshen,
and unincorporated Utah County*

Great Salt Lake Shoreland Plans

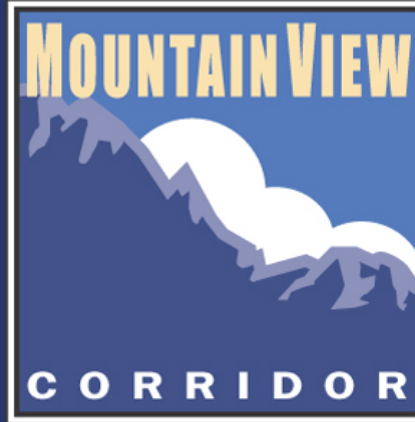
- Davis County (2003)
 - 9 cities/1 county
- Salt Lake County (2003)
 - 1 city/1 county





(2004)

E N V I R O N M E N T A L



I M P A C T S T A T E M E N T

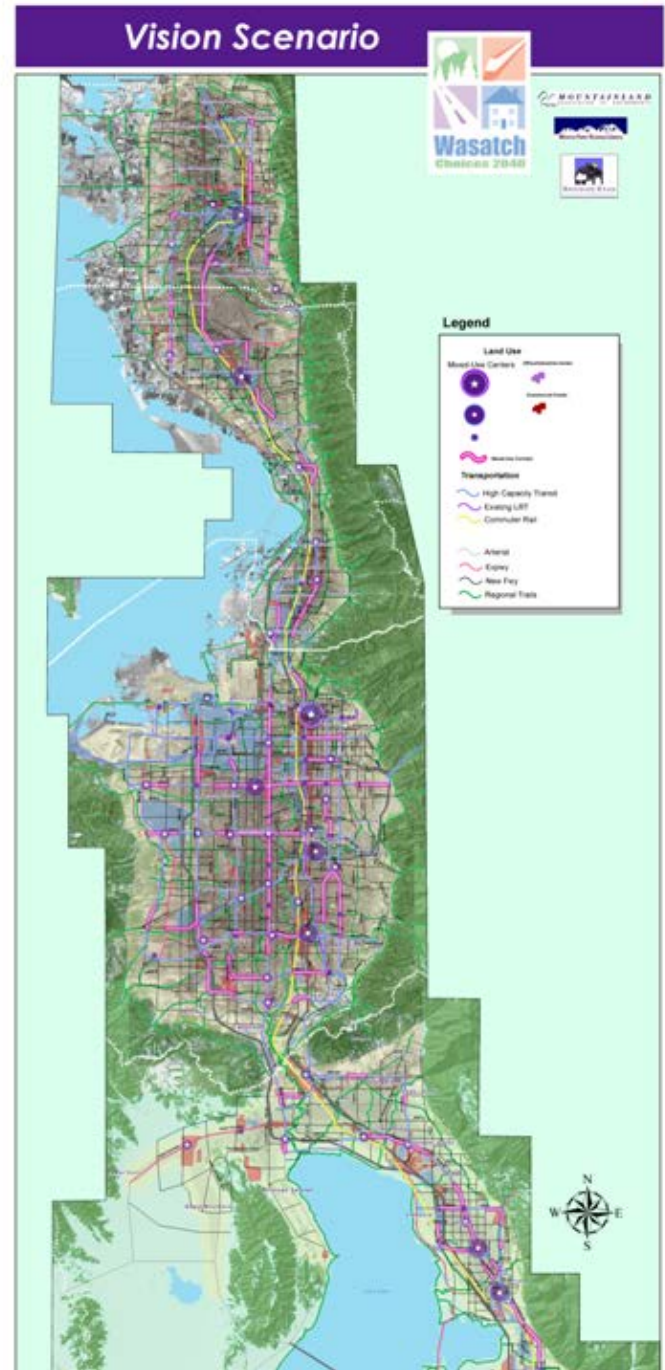
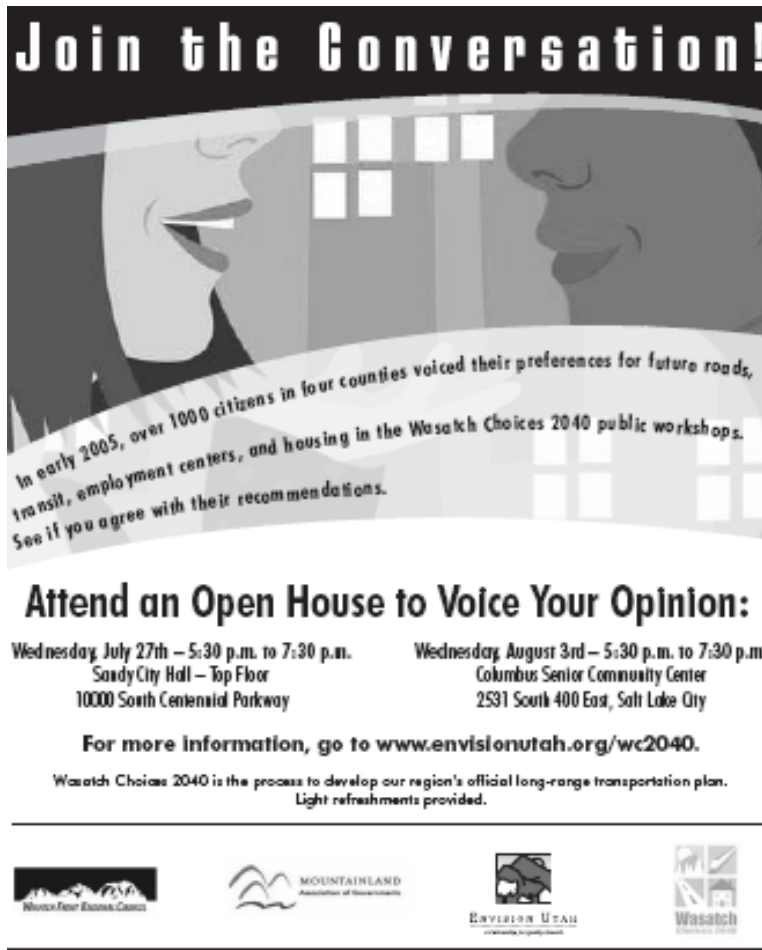


MOUNTAINLAND
Association of Governments



Government	Percentage
Current government	85%
Previous government	15%

(2005)



LEGEND

- COMMERCIAL
- EMPLOYMENT
- RESIDENTIAL
- MIXED USE
- TRANSIT SERVICE AREA
- ≡ BUS RAPID TRANSIT
- ≡ EXPRESS BUS ROUTES
- ≡ BUS ROUTES
- ≡ BELTWAY
- ≡ I-15
- ≡ MAJOR ROAD

(2007)

VISION DIXIE

Making a Better Washington County



Downtown Rising (2007)

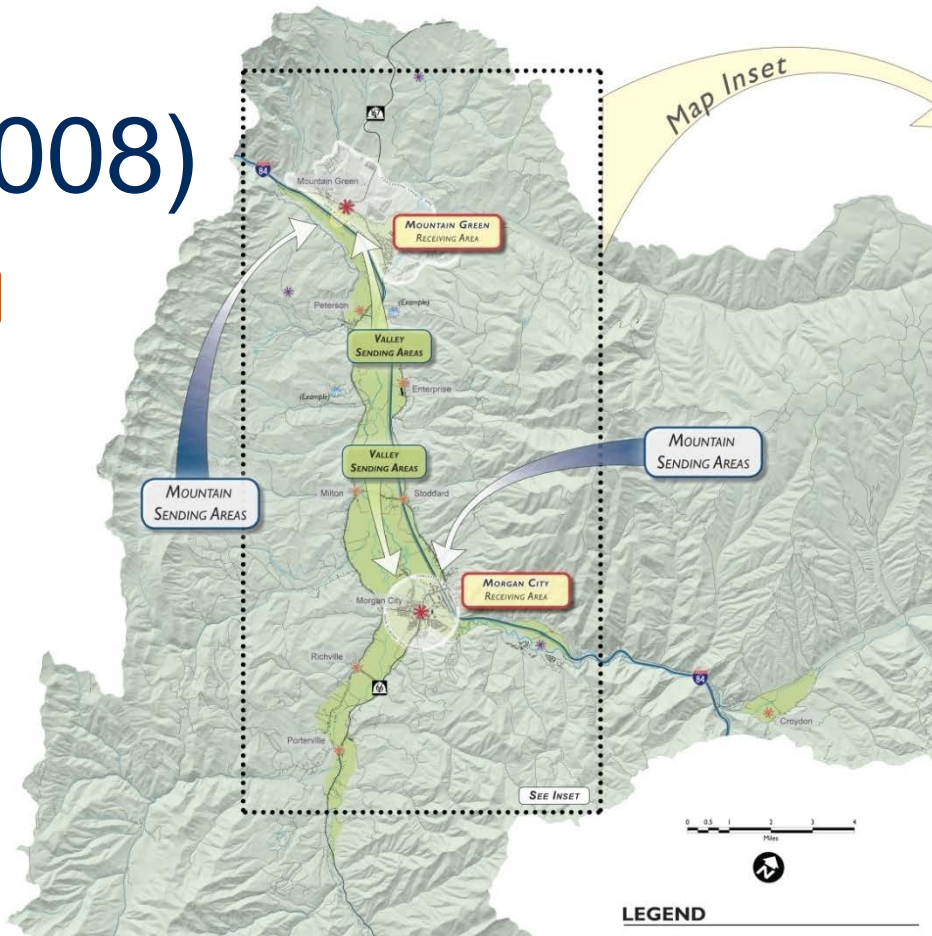




(2008)

(2008)

Map Inset

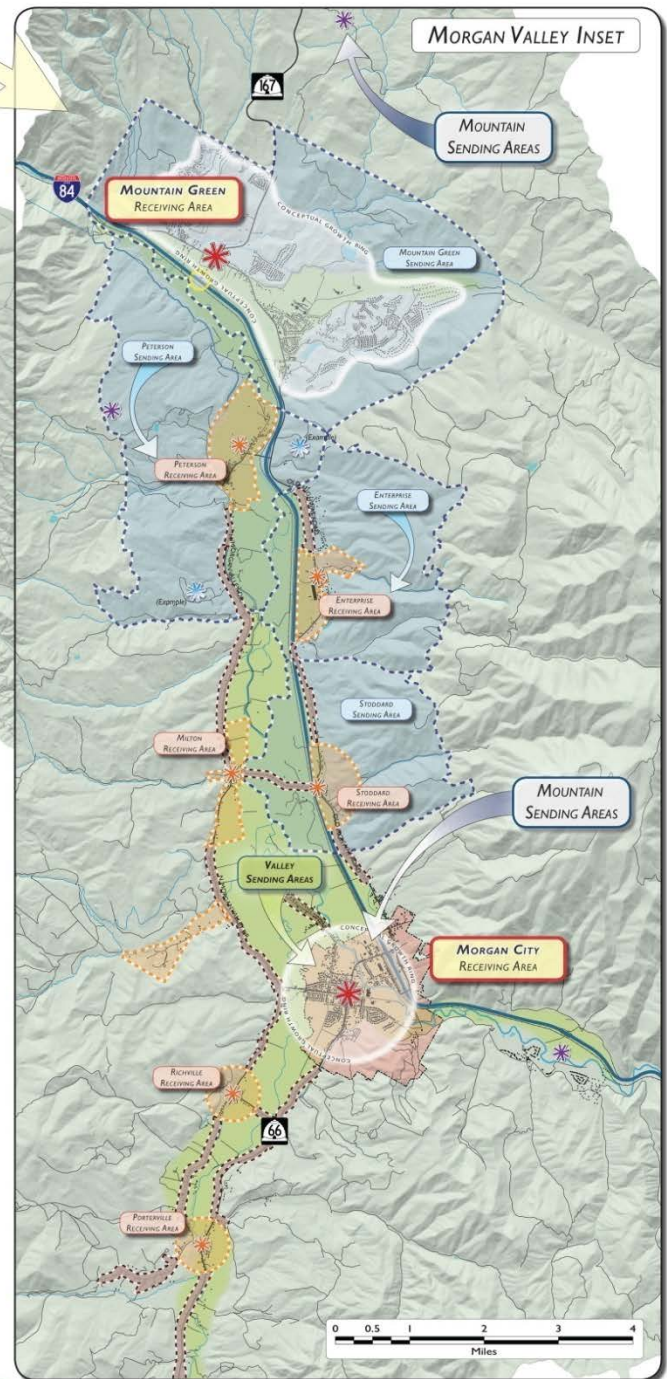


LEGEND

- Roads
- I-84
- Rivers & Streams
- Lakes
- Proposed Interchange (I-84 & UT 167)
- RECEIVING AREAS**
- Primary (Small Town - Morgan City & Mountain Green)
- Secondary (Village - All)
- Resort
- Cluster (EXAMPLE ONLY)
- SENDING AREAS**
- Highway Corridor
- Village
- Valley
- Mountain

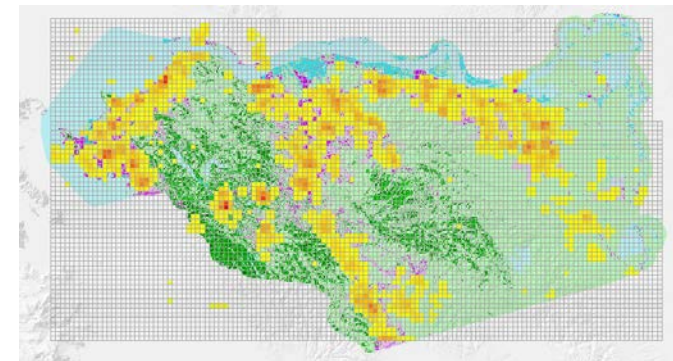
PLEASE NOTE: Items shown in map are conceptual

MORGAN VALLEY INSET



ENVISION
Morgan

(2010)



(2010)

Wasatch Canyons TOMORROW

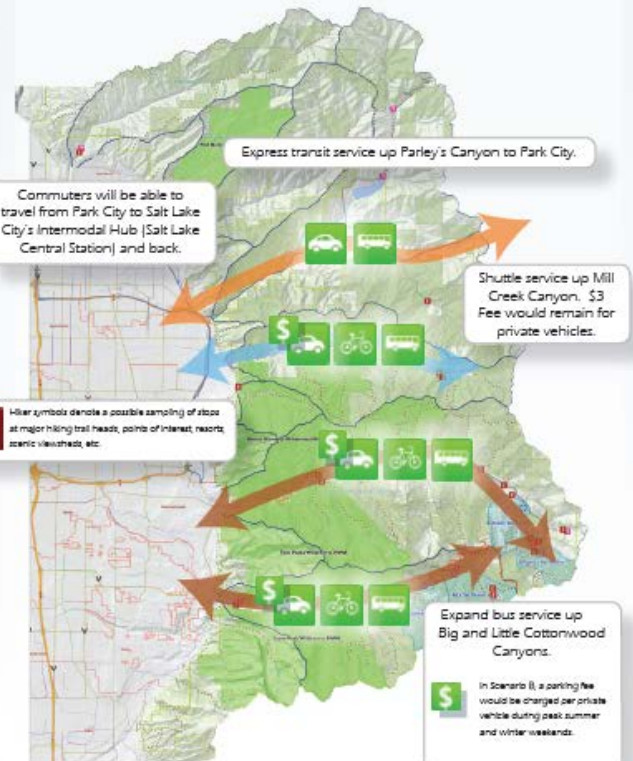
The transportation scenarios.



Scenarios A & B



Scenario B: Bus stops at major trail heads. Bikers are free to share lanes with busses.



- More than 16,000 residents participate
- Over 25,000 comments

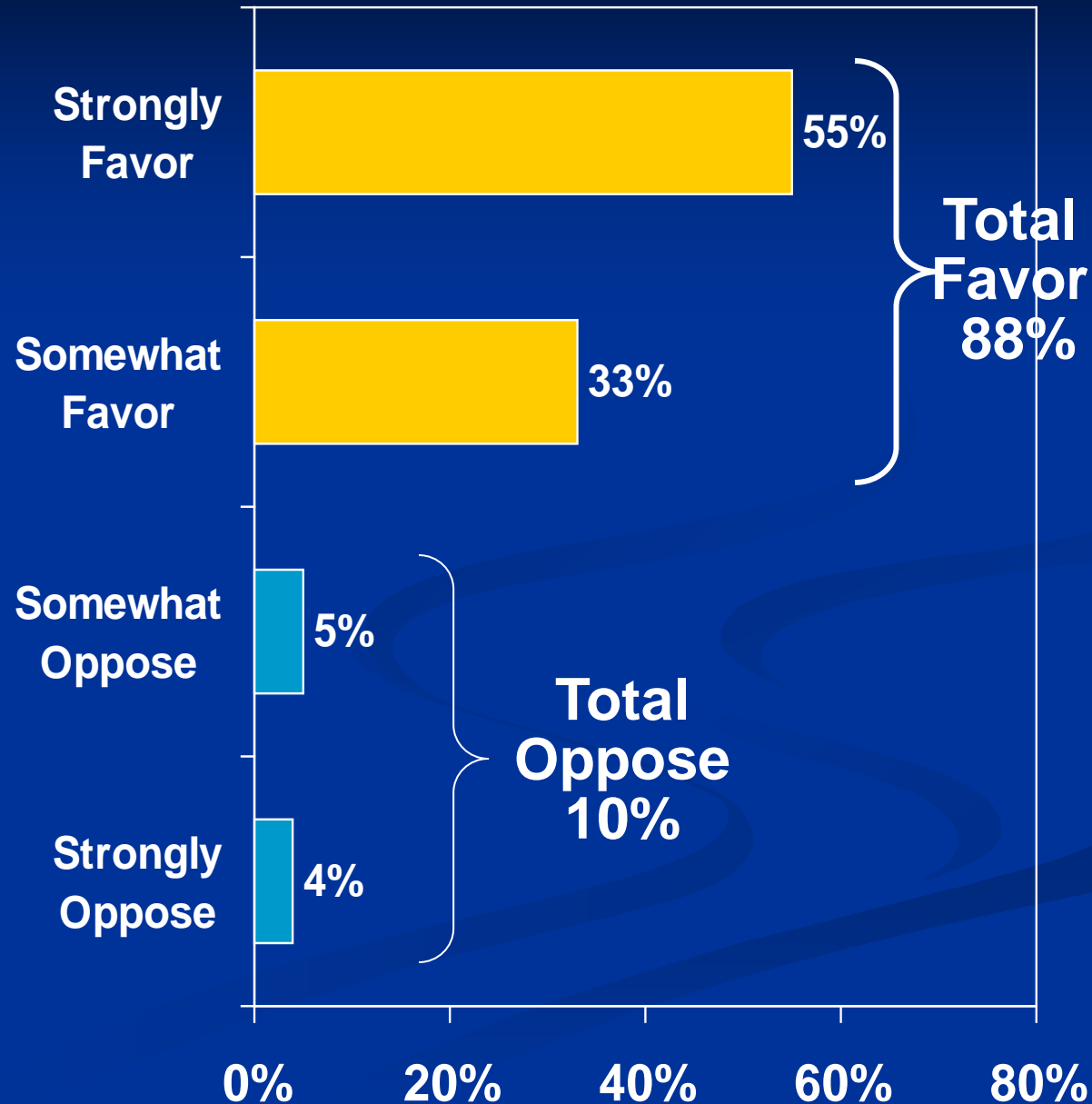


2010



Utah's Public Transportation

*Do you favor or oppose the **EXPANSION** of light rail, often referred to as Trax, and other public transportation systems?*



The Long Range Plan is an Integrated Road and Transit Plan

**A Complete
Mobility System**



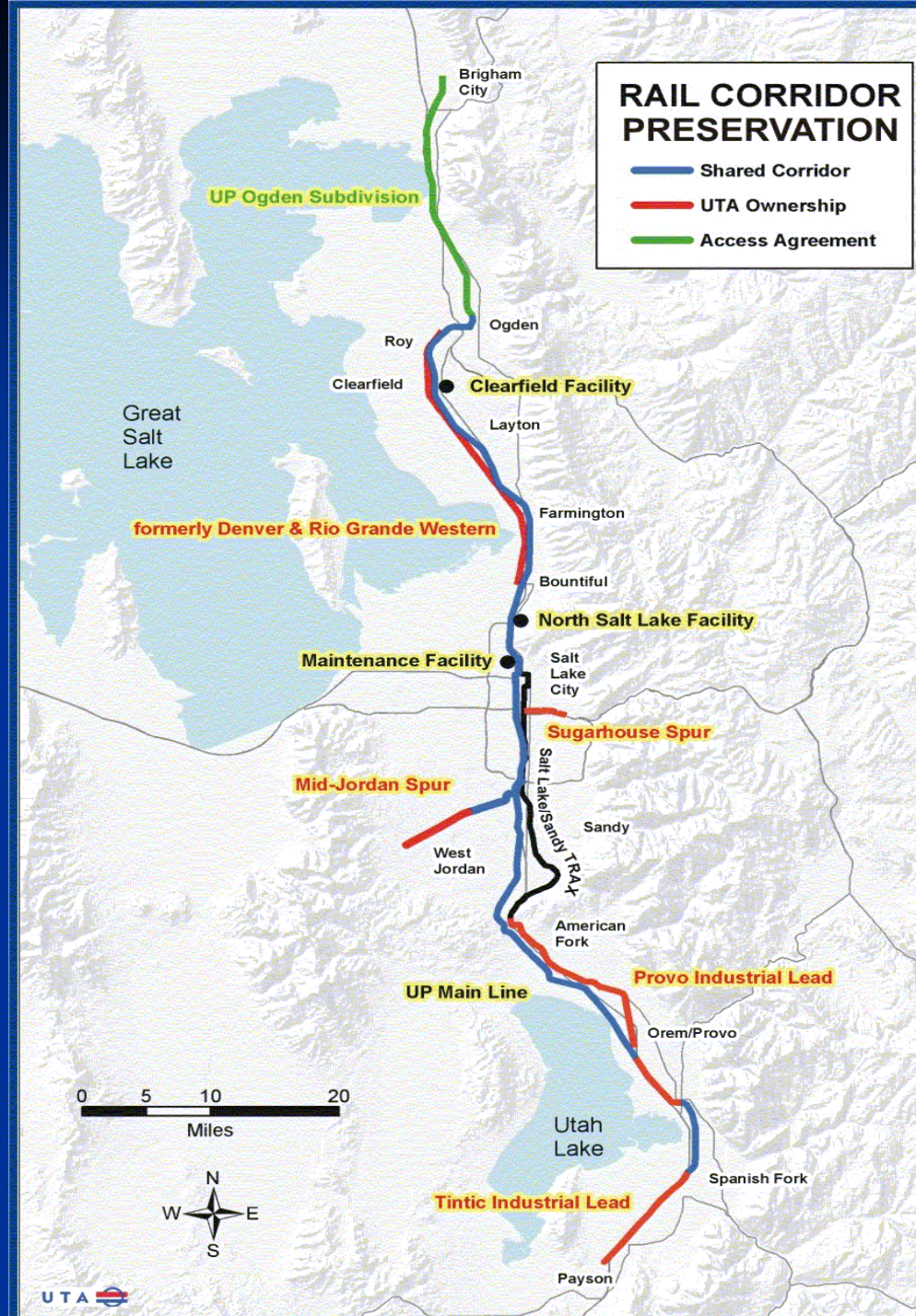
+



**We
Need Both**

Future Transit

- \$185 million acquisition
- Purchased 175 miles of rail right-of-way
- Created nine future transit corridors



The Result

- Only region with commuter rail, light rail, street car and bus rapid transit under construction simultaneously
- Adding 70 miles in 7 years
- 130+ mile-system





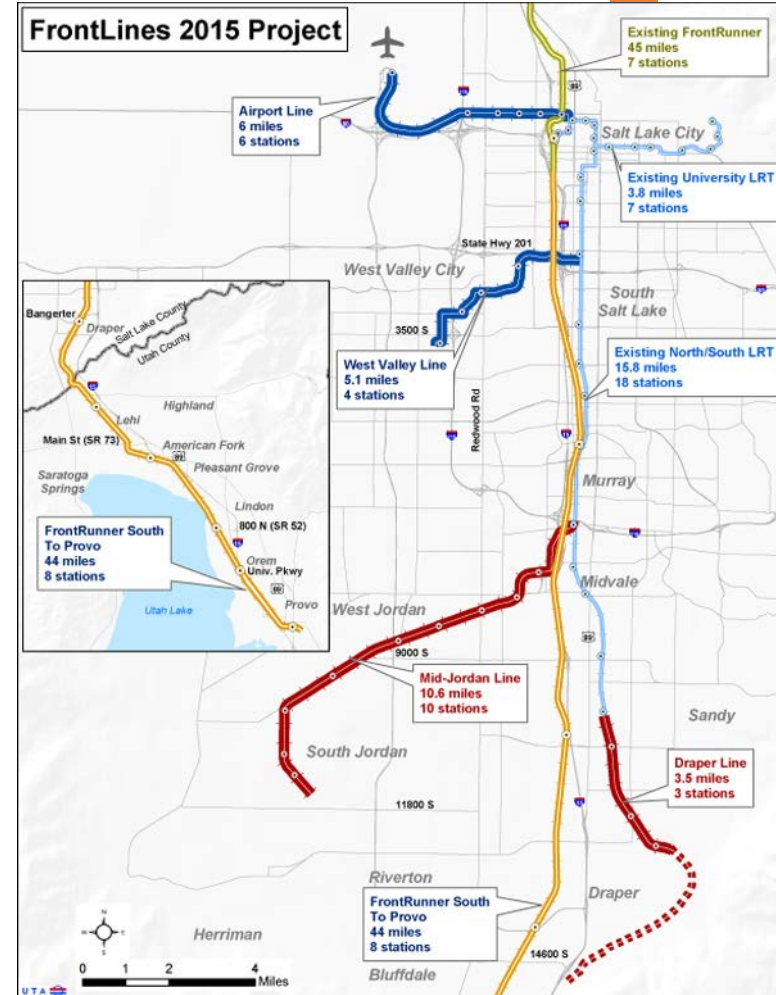
The Result

□ Daybreak



The Result

- **Population Near Transit Stops**
 - ▣ **Today**: 70% are within 3 miles of a major transit stop
 - ▣ **Goal by 2040**: 90% within 1 mile



The Result

The Salt Lake Tribune

SLC tops nation in transit connecting people and jobs

UTA • Future rail lines will boost those numbers even further.

By Lee Davidson
The Salt Lake Tribune
Published: July 12, 2012 10:18AM
Updated: July 12, 2012 08:30AM

It's a lofty statistic that may help keep an improving local economy on track: The Salt Lake City metro area's trains are now rank as the nation's best in connecting people to jobs.

A new study shows 64.1 percent of the area's residents can reach a typical job within a 90-minute transit ride — a 10 percentage-point jump from last year, when the area ranked third nationally.

The improvement comes after completion of the new West Valley City and Mid-Jordan TRAX lines.

"Not only did those extensions help, but so did our redesign of the bus system at the same time," said Utah Transit General Manager Michael Allegra. "We used the new rail lines to modify our whole system using a market approach at what was working and what wasn't," and trying to take passengers where they most wanted to go.

The study, released Wednesday by the Brookings Institution, a Washington-based research organization, reported a percent average among the nation's top 100 metro areas. Most of those areas long ago designed "spoke and wheel" systems to take people from suburbs to downtown areas. However, as more jobs have moved into dispersed "burbs" systems connect fewer people with jobs.

UTA's operations to keep up with changing demands and evolved into a grid system in the area's geography — bounded by mountains and la

Salt Lake City's transit tops nation's metropolitan areas | Deseret News

Deseret News

Salt Lake City's transit tops nation's metropolitan areas

By Erin Hong, Deseret News

Published: Wednesday, July 11 2012 10:20 a.m. MDT



Salt Lake City was top of the list for transit access of the metropolitan workforce in 90 minutes or less. (Scott G. Winkler, Deseret News)

Only 27 percent of the metropolitan workforce is able to reach their jobs in 90 minutes or less by transit. But for Salt Lake City, 64 percent of the metro area is available to workers, according to a report by Brookings Institution Metropolitan Policy Program.

Salt Lake City's public transit access to employees outshines places like New York, which ranked number 17 on the list, and Washington D.C., which ranked 23 at 33.8 percent, according to the study.

Employers' access in the West top those in the South at reaching employees through transit, said Adie Tomer, Brookings' senior research associate and author of the report. "Also, in many metropolitan areas, the access to labor in cities is much greater than the access to labor in suburbs, because of the older design of transit systems and more modern employer sprawl to the suburbs."

The Utah city of Provo neared the top of the list, ranking number seven with 47 percent access rate, and Ogden followed close behind at 44 percent.

"While metropolitan unemployment rates remain stubbornly high, vacancies do exist across most industries," Tomer said. "Expanding access to larger pools of qualified labor will help fill those positions and improve economic performance. This research can help metropolitan areas more efficiently develop their transit networks and address that access gap."

Email: Ehong@desnews.com

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Water Use Has Dropped Significantly

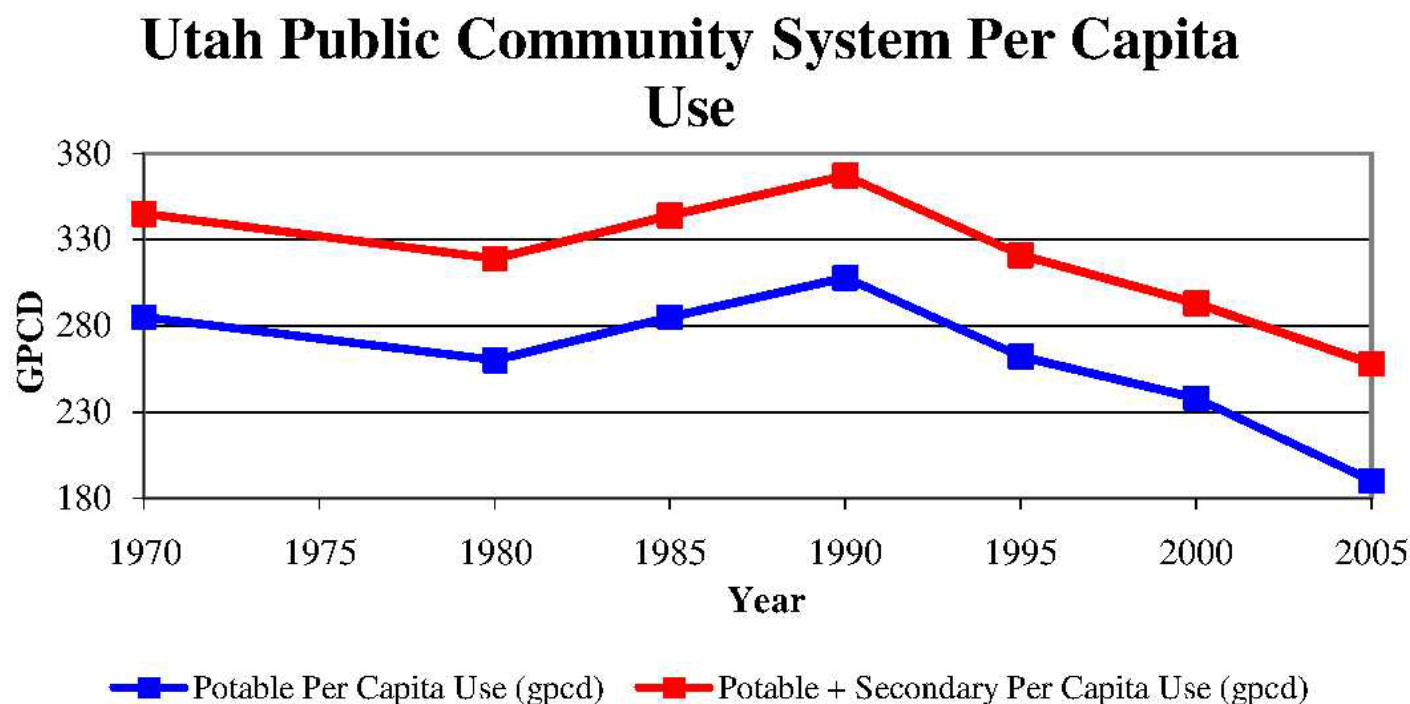


Figure 5 Utah public community systems per capita water use

Source: DWRe *Municipal and Industrial Water Supply and Use Studies Summary*, 2005. Division of Water Rights, Utah Water Use Data Reports, 1980 – 2000.

The Result – City Creek Center



The Result

Forbes

The Utah metropolitan areas epitomize or exemplify the benefits of diversification...

Mark Muro, Brookings Institution

BUSINESS | 11/22/2011 @ 11:59AM | 51,225 views

The Best States For Business

The U.S. economy grew by 2.5% in the third quarter which was its best performance in a year, but no one is breathing out the party hats just yet. The first half saw microscopic growth of 0.9%. Economic problems seem to be lurking seemingly everywhere.

Unemployment is too high at 9.1% and underemployment running at a 12.2%. Housing prices

continue to fall. U.S. corporate income taxes remain the second highest in the world. The Greek debt crisis is not going anywhere and gridlock in Congress continues unabated. It is enough to make anyone want to scream.

Yet for businesses or employees struggling with the question of where to relocate (or expand in the case of businesses), we offer a scorecard on what states have the best business climates.

Utah repeats this year as Forbes Best State for Business and Careers in our sixth annual look at the business climates of the 50 states. No state can match the consistent performance of Utah. It is the only state that ranks among the top 15 states in each of the six main categories we rate the states on.

[In Pictures: The Best States For Business](#)

[Complete Coverage: The Best States For Business](#)

Utah highlights include energy costs 31% below the national average and employment growth that has averaged 0.6% the past five years. Compare that to the U.S. as a whole where job growth has averaged negative 0.6% since 2005. Utah's 5% corporate tax rate is well below western neighbors Arizona,

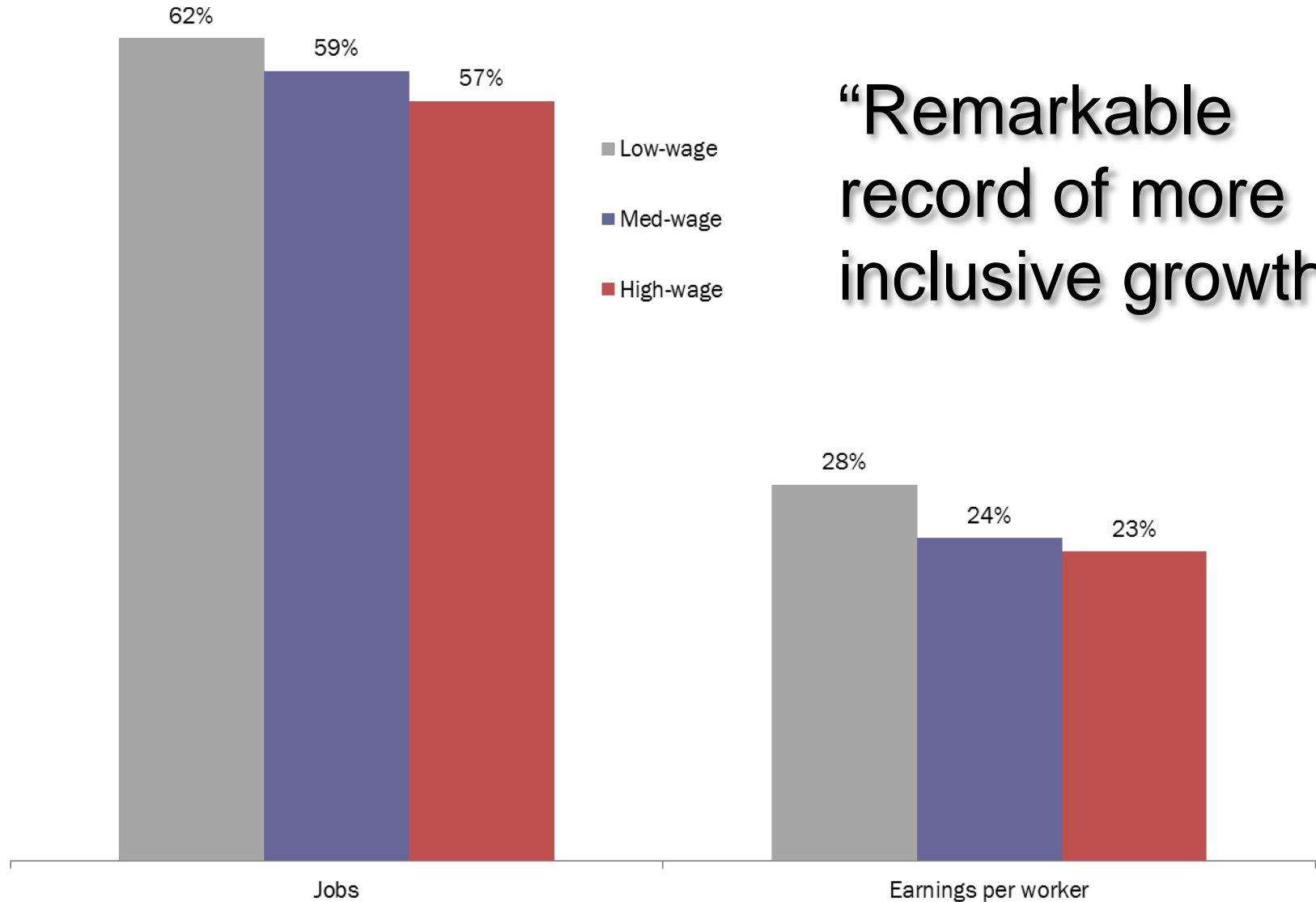


[Click for full photo gallery: The Best States For Business](#)



Growth in Jobs and Earnings by Wage Level

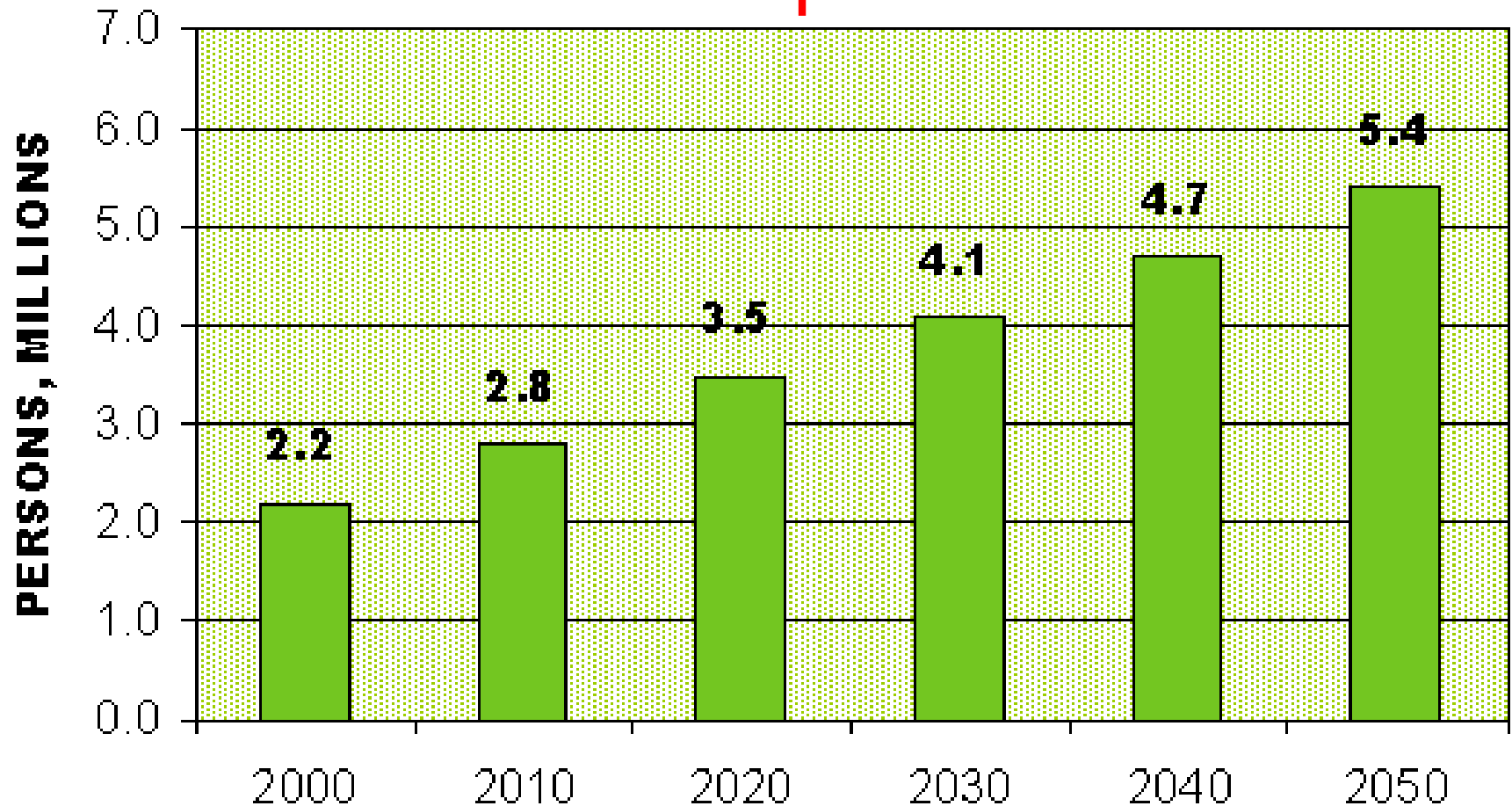
Salt Lake City Metro, 1990 to 2010



“Remarkable
record of more
inclusive growth”

After 16 Years, Is Envision Utah Done?

Utah Population





Together, preparing for the next 2 million

Downtown Grows West Embrace Opportunity



Balanced Growth

Access to housing, jobs and transportation options



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Market responsive

Increase options for urban living



Market responsive

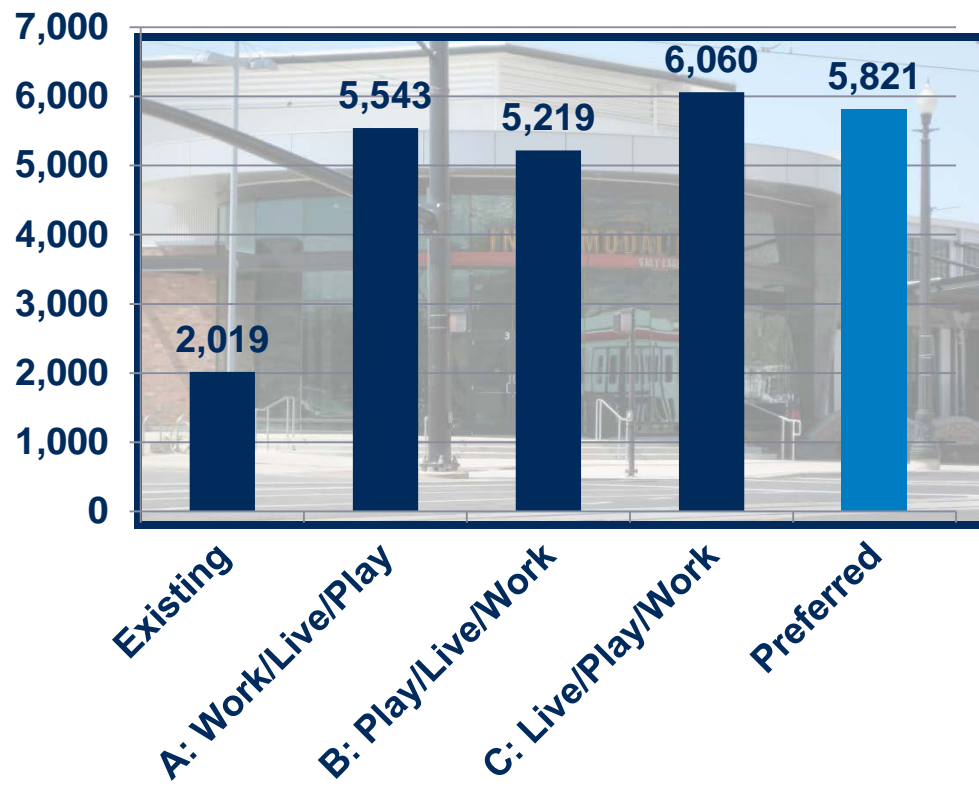
Increase options for urban living



Local Visioning | Regional Benefit

Improve air quality | less time in traffic | more time for what we enjoy

Daily Transit Trips



A Successful Vision:

- Is guided by a large, trusted, and diverse group of **Stakeholders**
- Relies on community **Values** to find common ground, communicate choices, and build consensus
- Uses **Scenarios** as the ongoing process to provide clear choices and refine direction



Is a future left to chance a legacy you are willing to leave your children and grandchildren?

