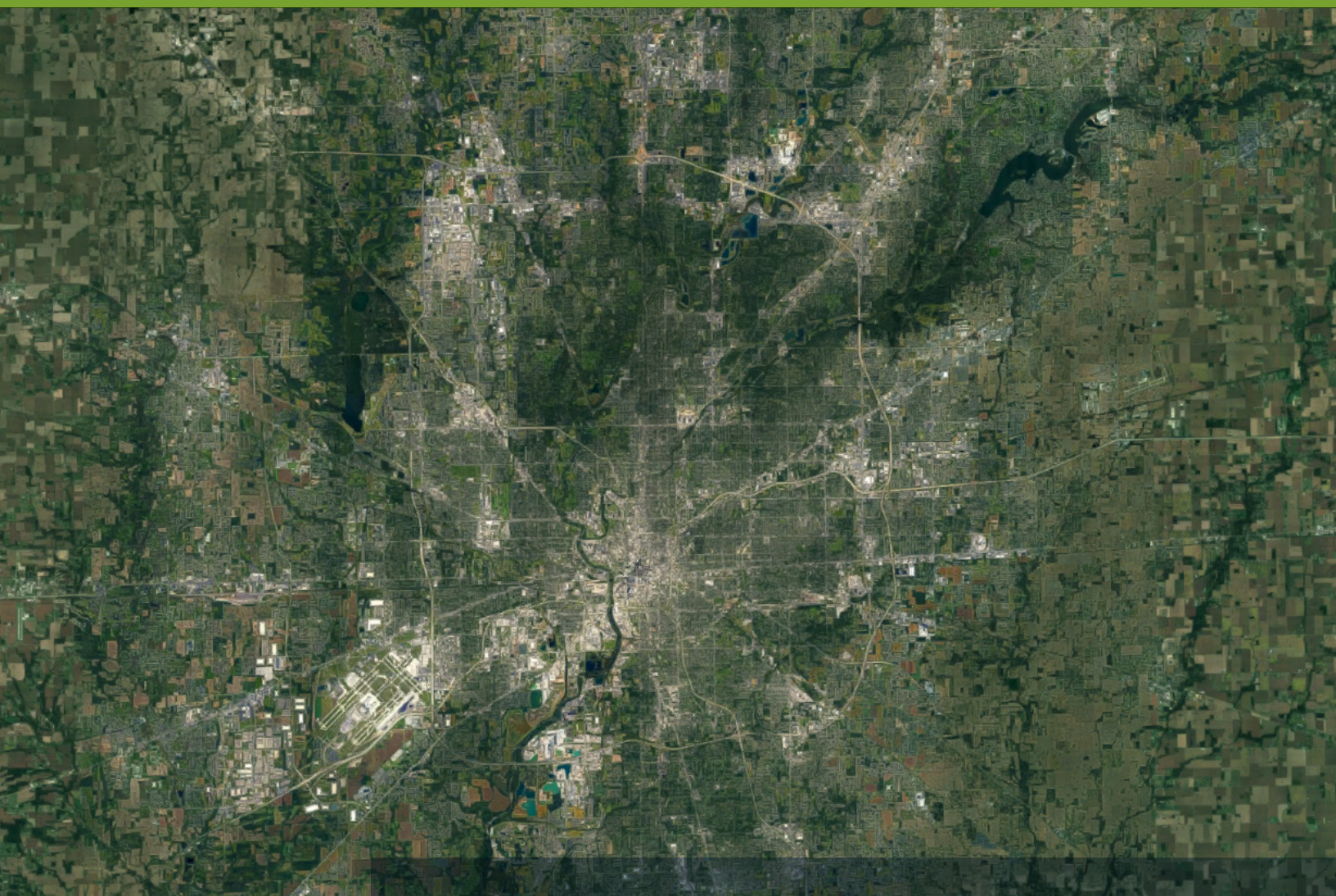


CENTRAL INDIANA

Investigating the Spatial Mismatch between Jobs and Workers



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About the Urban Land Institute

The Urban Land Institute is a global, member-driven organization comprising more than 45,000 real estate and urban development professionals dedicated to advancing the Institute's mission of shaping the future of the built environment for transformative impact in communities worldwide. ULI's interdisciplinary membership represents all aspects of the industry, including developers, property owners, investors, architects, urban planners, public officials, real estate brokers, appraisers, attorneys, engineers, financiers, and academics. Established in 1936, the Institute has a presence in the Americas, Europe, and Asia Pacific region, with members in 81 countries. ULI's extraordinary impact on land use decision-making is based on its members' sharing expertise on a variety of factors affecting the built environment, including urbanization, demographic and population changes, new economic drivers, technology advancements, and environmental concerns. Peer-to-peer learning is achieved through the knowledge shared by members at thousands of convenings each year that reinforce ULI's position as a global authority on land use and real estate. Drawing on its members' work, the Institute recognizes and shares best practices in urban design and development for the benefit of communities around the globe.

More information is available at uli.org. Follow ULI on [Twitter](#), [Facebook](#), [LinkedIn](#), and [Instagram](#).

About ULI Indiana

As the preeminent, multidisciplinary real estate forum, ULI facilitates the open exchange of ideas, information, and experience among local, national, and international industry leaders and policymakers dedicated to creating better places. The ULI Indiana District Council brings together real estate professionals, civic leaders, and the community for educational programs, initiatives impacting the state, and networking events, all in the pursuit of advancing responsible and equitable land use throughout the State of Indiana. With 320 members locally, ULI Indiana provides a unique venue to convene and share best practices in the state. ULI Indiana believes everyone needs to be at the table when the state's future is at stake, so ULI serves the entire spectrum of land use and real estate development disciplines – from architects to developers, CEOs to analysts, builders, property owners, investors, public officials and everyone in between. Using this interdisciplinary approach, ULI examines land use issues, impartially reports findings, and convenes forums to find solutions.

ULI District Council Leadership

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About the Curtis Infrastructure Initiative

Thanks to a generous donation from Jim Curtis, ULI launched the Curtis Infrastructure initiative. This multi-year initiative aims to build a movement to promote infrastructure solutions that are equitable and resilient and that enhance long-term community value. By creating new global and strategic partnerships, providing technical assistance, building capacity at the local level, and acting as a feedback loop to promote the most innovative and effective best practices, the Curtis Infrastructure Initiative will ensure the success of ULI's mission to positively shape the future of the built environment for transformative impact in communities worldwide. A thoughtful approach to infrastructure planning and implementation addresses the pressing needs of today and improves diverse communities for the long term.

A building block for communities everywhere, infrastructure encompasses transportation, critical utilities, and the means of communication. But beyond these foundational physical and digital structures and facilities, infrastructure broadly includes the key spaces that build community—anchor institutions, the civic commons, and housing. Because infrastructure provides the means for connection, creative placemaking, and opportunity, smart infrastructure investment is an imperative for our cities now and in the future.

Together we can build the future of equitable and resilient communities. Learn more about the Curtis Infrastructure Initiative at uli.org/infrastructure.

ULI Advisory Services identify creative, practical solutions for complex land use and development challenges.

Technical Assistance Program (TAP)

Urban Land Institute harnesses its members' technical expertise to help communities solve complex land use, development, and redevelopment challenges. Technical Assistance Panels (TAPs) provide expert, multidisciplinary, unbiased advice to local governments, public agencies, and nonprofit organizations facing complex land use and real estate issues in Indiana. Drawing from its professional membership base, ULI Indiana offers objective and responsible guidance on various land use and real estate issues ranging from site-specific projects to public policy questions. The sponsoring organization is responsible for gathering the background information necessary to understand the project and present it to the panel. TAP panelists spend two days interviewing stakeholders, evaluating the challenges, and ultimately arriving at a set of recommendations that the sponsoring organization can use to guide development going forward.

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Panelists interviewed stakeholders from around the region.

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ULI



Regional leadership and professional staff provided insights into the worker/job mismatch in their localities.

EXECUTIVE SUMMARY

Central Indiana, Indianapolis/Marion County and the seven surrounding counties, has been dubbed the “crossroads of America,” with an enviable rail and interstate highway transportation network winding to, through, and around the metropolitan area. With this rich transportation network, international airport, and large tracts of developable land in the surrounding counties, the region has become a location of choice for manufacturing, distribution, and logistics (MDL) businesses, attracting both national and international operations to the state.

The growing MDL business sector relies on a workforce that is ready and able to work in shifts throughout the day and night. Yet low wages, childcare challenges, transportation barriers, and lack of attainable, affordable, or workforce housing is putting increasing pressure on the sector, leading to high employee turnover in Indiana and nationwide.

The counties surrounding Indianapolis – Boone, Hamilton, Hancock, Hendricks, Johnson, Morgan, and Shelby counties – are increasingly home to new MDL business locations, which is a boost for those counties and their respective municipalities. In many cases, however, residents in these same communities are commuting into Marion County for higher-wage positions requiring greater educational attainment, leaving the MDL businesses to rely on employees commuting from Marion County out to the surrounding counties. This misalignment of workers and MDL jobs led the Indianapolis Metropolitan Planning Organization (IMPO) to join forces with the Indiana district council of the Urban Land Institute (ULI Indiana) to pursue a ULI Curtis Infrastructure Initiative grant to study the mismatch and uncover potential solutions.

Using its trusted and unbiased technical assistance panel program, ULI Indiana convened a panel of experts from the region, interviewed stakeholders, analyzed the data provided by the IMPO, and ultimately arrived at a series of recommendations that the IMPO can begin to use in its planning efforts.

Business climate. The Indianapolis metro area is doing a good job of attracting MDL businesses. With a competitive business climate, robust rail and road network, and sizable labor force, Indianapolis should be in a good position to grow and expand this business sector. Yet, the distances employees must travel to reach these MDL jobs often require long and costly commutes, which affects employees’ quality-of-life. In today’s business climate, quality-of-life challenges become business challenges.

Workforce climate. The data show that the region has the available jobs and the associated workforce, yet how people are choosing to work and/or how they are able to connect to those places of business paints a more complex and challenging picture. For nearly one-half of the population, additional skills training is required to fill open positions and, of those currently employed, one-third are not earning enough income to meet their basic needs. Another challenge is attracting younger workers who are choosing where to live first based on quality-of-life characteristics and then turning to look for a job.

Transportation and access. The site selection for businesses entering the market takes into account the size, educational attainment, and skills of the available workforce. How that workforce will reach the potential jobs, however, is not as often a part of that initial conversation. Transportation can be a challenge in Indianapolis, and, with a substandard public transportation network, too many employees must rely on personal automobiles to reach their jobs. Driving is becoming increasingly more

expensive and, when paired with housing costs, regularly consumes one-half of the average regional household's annual income.

Housing environment. Housing affordability is a national concern, and Indianapolis is no exception. With single-family homes dominating the new construction market, the price points for homeownership are easily outside the grasp of too many with rents following suit, and there is not enough housing supply to meet demand. Attention must be paid to creating more attainable housing and addressing the affordability of housing across the region.

Economic Development and Policy Considerations.

Business development without community development is a losing strategy. Economic development is managed at the local, regional, and state level and has for too long focused on business pursuits without (much) regard for the wishes, needs, or resources of the surrounding community. The result is a region that competes well for new projects yet has difficulties closing a deal.

Community and Land Use Planning. As identified in the regional comprehensive economic development strategy, in most cases businesses are driving today's land use conversation and elected leaders are catering to the business community's needs at the expense of the residential community. At the same time, there are a number of residents resisting change (NIMBY), citing unfounded negative impacts to property values, schools, etc., who do manage to influence their elected leadership. This results in plan commissions and councils turning away developments or forcing builders/developers to revise plans that in most cases make homes less affordable and limits the diversity of options that buys are wanting today.

Priority Ranking. The potential solutions to the issues facing the region and the mismatch of jobs and workers are complex. With the contributing factors – housing, transportation, etc. – so tightly interwoven, it is difficult if not impossible to separate the issues from one another.

However, within the context of how to best approach these complex issues on a regional scale, the panel recommends beginning with policy and strategy development and using that strong foundation as the base from which to build political will, better site selection, transportation decisions, workforce development, and housing decisions.

Themes across Topics

Throughout the study, several threads wove across conversations, topics, and research.

Transportation is an issue in the metropolitan area.

Commutes are long, public transportation options are substandard, and personal automobiles are expensive.

Everyone has an important role to play in influencing change.

From elected leaders to individual residents, everyone should have a voice at the table and be able to influence where and how resources are deployed in the community, particularly as it impacts where they live and work.

Collaboration is key. The worker/job mismatch is complex and will require an all-hands-on-deck approach to solutions. No one agency, department, company, or leader is solely responsible for the problem, nor should any one person or agency be tasked with the solution. It's a regional problem that will require regional solutions.

Finally, the panel was struck by the need to plan, not for the next five years, but for the next 50. As the MDL sector increasingly automates, its workforce will shrink accordingly. While there is a spatial mismatch today between the workers needed for the MDL sector and the location of those jobs, it is not clear that this will remain a long-term issue for the region. Regional planners and leadership need to be in conversation with industry, working to understand present needs but, perhaps more importantly, future needs so the region and its workforce can be prepared to compete, succeed, and thrive well into the future.

INTRODUCTION AND BACKGROUND

ULI Indiana and the Indianapolis Metropolitan Planning Organization recently partnered in pursuit of funding through ULI's national Curtis Infrastructure Initiative to investigate the spatial mismatch between jobs and workers in central Indiana. The goal of the national infrastructure initiative was to provide technical assistance as part of a cohort to help build capacity to reconnect divided communities—physically, socially, and digitally. In Indiana, that focus turned to the potential opportunities to create more equitable access to the region's manufacturing, distribution, and logistics (MDL) jobs.

Central Indiana is home to a large workforce, many of whom live in the urban core. Indianapolis is also home to a significant number of MDL businesses, many of whom are located in Indianapolis's surrounding counties and suburbs. The challenge? The region lacks good public transportation connections (between this urban workforce and the more suburban MDL jobs).

To address this challenge ULI Indiana and the IMPO turned to ULI's trusted technical assistance panel (TAP) process to study the challenge and bring relevant and timely industry knowledge and expertise to the task. The TAP panel, comprised of professionals with expertise in land use planning, transportation, development, brokerage, and policy development, met with a wide variety of stakeholders from the community, including property and business owners, regional planning staff, real estate developers, institutional leadership, neighborhood representatives, and city professional staff. With the briefing information, the

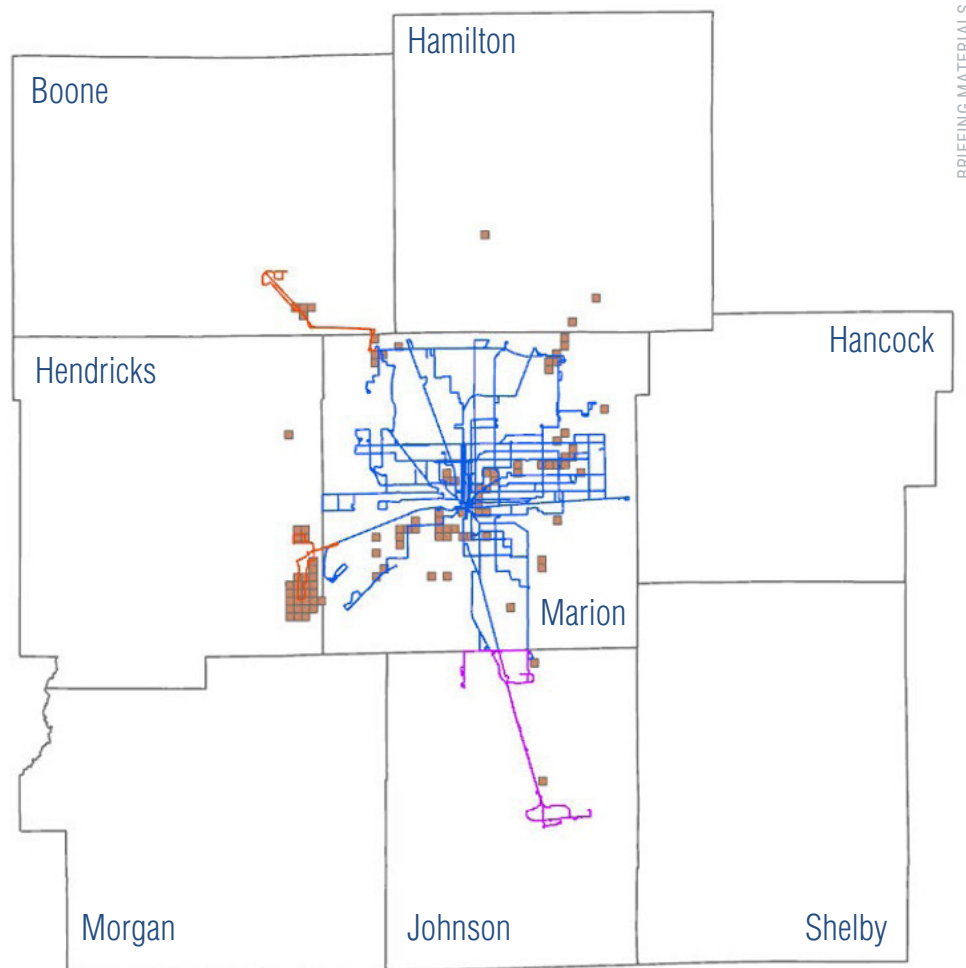
stakeholders' insights, and their own professional expertise at the ready, the panel spent a day and a half analyzing the mismatch between the location of the area's workforce and the mass of MDL businesses. The goal of the TAP was to develop a cohesive strategy for future planning projects to better connect the MDL industry – land and business owners, tenants, and brokers – and supplement the IMPO's on-going relationship-building efforts and planning work.

Stakeholders

As a key function of the TAP process, the panel interviewed a wide variety of stakeholders, including planning professionals, community leaders, and public-sector leadership to better understand the dynamics at play, other economic or logistic challenges at hand, and the specific issues communities and business owners face as they work to attract talent to suburban locations.

Questions for the Panel

1. **What are the factors contributing to the spatial mismatch of workers and jobs (wages, housing, childcare, transportation, etc.) in Central Indiana? Can we rank these or quantify the degree each contributes to the problem?**
2. **Who has the power to influence these factors?**
3. **What are potential solutions?**



This map of Marion and the surrounding seven counties shows the scale and limited reach of the region's transportation network, comprised of fixed routes by three different transit providers, in relation to MDL business locations, indicated by the brown squares.

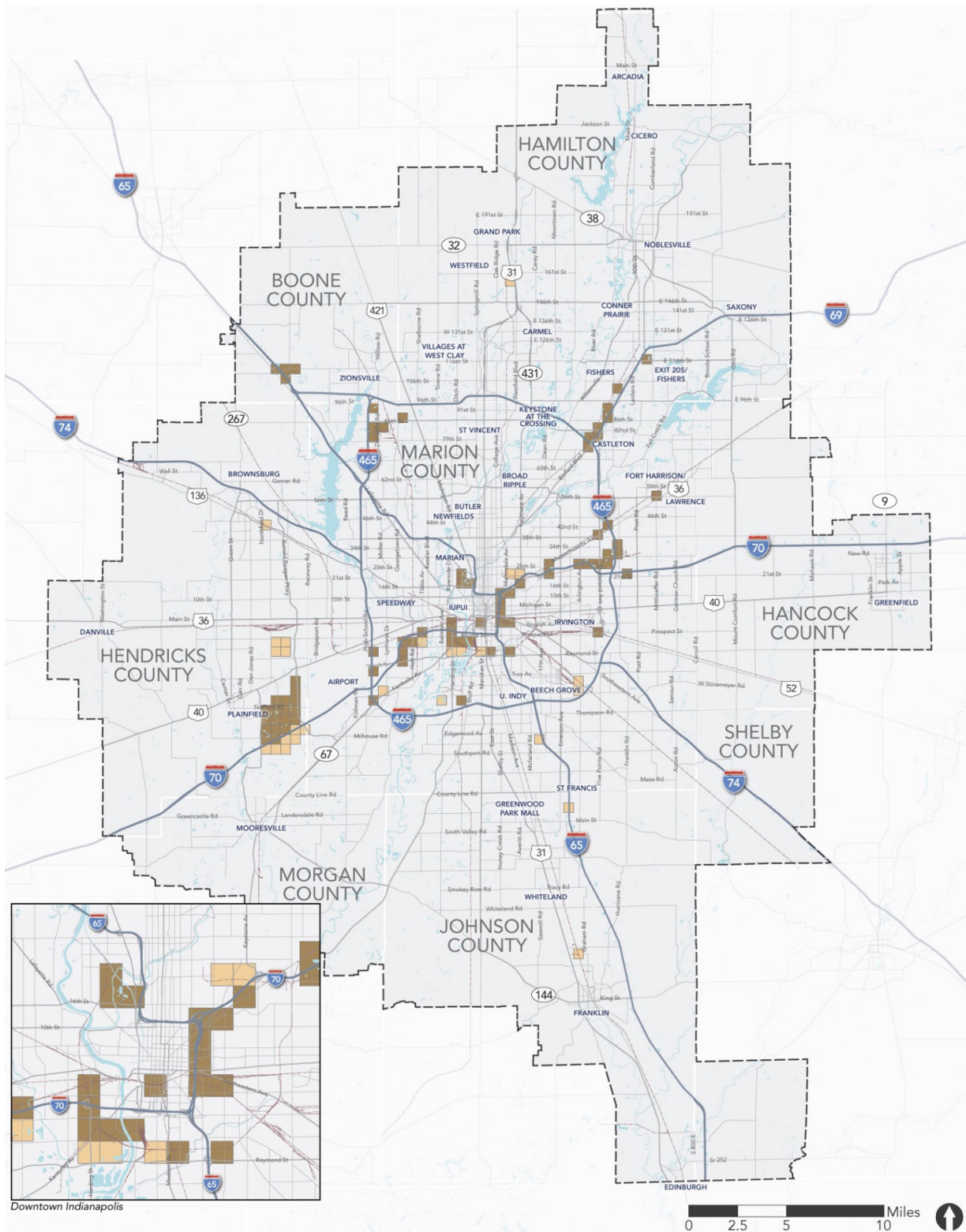
More specifically, the stakeholders interviewed included representatives from Hamilton, Hancock, Johnson, and Boone counties, innovation district leadership, professional staff from the City of Indianapolis, surrounding municipal professional staff (*e.g.*, Cumberland, McCordsville), and representatives from IndyGo, the Indianapolis Chamber of Commerce, and the MIBOR REALTOR Association.

What's Going Right?

Through the course of the interviews and ensuing panel deliberations, the panelists identified a series of policies and interventions that are currently having a positive

effect on the region, creating more equitable access to the region's jobs.

- Marion County has in place an Inclusive Incentive policy wherein businesses commit to an \$18/hour minimum wage and provide access to transit via proximate bus stops.
- A number of employers in the region would like to see an expanded transportation network and additional public transit options for their employees.
- There is interest from some municipalities to expand transit routes into their geography to better connect residents and complete a regional transit system.



This map of the Metropolitan Planning Area shows the MDL business locations, indicated by the brown squares in relation to the automobile transportation network.

- Some communities are considering how to provide wraparound services and better transportation options in order to further support their residents.

Focus

The mismatch between jobs and the workforce is a real challenge for the region. The manifestation of that mismatch is different for everyone – there is no one problem and there are many contributing factors. Calling the mismatch purely ‘spatial’ is perhaps a misnomer as the disparities and lack of alignment can be found in a variety of areas, including transportation, worker skills, education, and more.

While there seem to be an unlimited range of factors contributing to or exacerbating the mismatch for the region, those that rose to the top include: business location, workforce/home residence location, transportation availability and access, housing options, regional and municipal economic development and policy, and community development and land use planning.

The panel worked to uncover potential solutions that regional planning leadership can pursue in order to better connect the regional employee base to jobs.



BUSINESS CLIMATE

The Indianapolis region is doing a good job of attracting national and international MDL businesses. With a competitive business climate, transportation network comprised of several interstate highways, and a labor force that appears matched to the task, central Indiana should be in a good position to grow and expand this business sector. In the framework of supply and demand, the businesses are the demand, talent is the supply, and at first glance, the two appear to be in balance.

Digging in deeper through qualitative (not quantitative) analysis, however, the panel identified a clear quality-of-life issue for the region. The distance employees are traveling to reach MDL jobs is affecting their quality-of-life, and the time urban core commuters spend driving or navigating public transit to reach suburban employers is significant. Effective transportation networks –regionally, locally, and within the last mile – are critical to the future success of the region and shifts this from simply a quality-of-life issue into a business issue that the region must address to remain competitive.

What the Panel Heard

The availability of a strong local labor market is an important factor in the business site selection process, and central Indiana scores well. Stakeholders noted that international companies with an interest in an Indianapolis location place a strong emphasis on the availability of local labor, more so than domestic corporations, but few of either pursue deeper details about the modes, proximity, and affordability of transportation options for their local workforce. The “how” of getting people to jobs is rarely part of early site selection conversations and is yet a significant factor in delivering a reliable workforce.

Surrounding support networks. The labor market in the MDL sector is exceptionally competitive. Businesses across the region are introducing new incentives and policies to attract and retain employees. However, many of these businesses are physically distant from other businesses and challenges remain in providing employees

with access to wraparound services (*e.g.*, medical care, counseling), amenities (*e.g.*, grocery stores, entertainment establishments), and connections to service industries (*e.g.*, childcare, quick-serve restaurants etc.). The lack of these types of supporting businesses leave employees in a position of commuting great distances to work and being isolated in place, unable to use lunch or break periods to manage personal errands or accomplish simple tasks. Quite often, these issues are ignored or unaddressed by businesses owners or operators until they reach a tipping point.

Transportation. Stakeholders also noted the challenges that exist in getting people to their jobs. Public transit, in the form of buses and bus rapid transit, is in place and a robust interstate highway network assists, yet the distances people must travel are great and time is lost in long commutes.

Training. Businesses are also experiencing challenges in locating qualified workers. To meet this challenge, some businesses are bringing training operations in house and designing and delivering specialized programs to build and nurture their own workforce. A broader, regional approach to training could help meet this workforce-readiness need and, as such, would be most effective if positioned geographically in location where the need is greatest.

Who Can Influence Change?

The challenges businesses face cannot be fixed by just one sector. The public and private sectors as well as area nonprofits need to engage in the process to spur new policies and change.



The TAP panel interviewed stakeholders from across the region to better understand the challenges at hand.

Private sector. Private-sector employer engagement is critical in working toward resolution. Specific challenges need to be outlined so that everyone can understand the breadth of the issues. Similarly the business community needs to engage in policy making, working with elected and professional municipal leadership to clearly outline the potential paths toward workable solutions.

Public sector. The region's elected leadership must be champions for change. With ready access to broad constituencies and public platforms, elected officials are in unique positions to amplify the need for broad-based solutions. The professional staff in place at the region's municipalities also play an important role in influencing change. They are often on the front line, interacting with residents and business owners and can see the issues clearly. They will not be able to manage the change process alone, however, and will require the support of their elected leadership.

Potential Solutions

Such a diverse set of challenges requires a diverse range of solutions.

Employee perks. From the private sector perspective, some business owners offering greater flexibility are finding success retaining talent. Employee benefit options include offering flexibility in hours worked (e.g., a 4-day, 10-hour-shift work week versus 5-day, 8-hour shift), providing free lunches/meals, and offering extra vacation and paid time off.

Transportation. While public transportation is available

to and around the surrounding suburbs, additional transportation connections would be helpful, particularly given the broad, campus-like nature of the typical MDL employer. By offering shuttle service to and from bus stops, connecting employees directly to the business front door, transportation burdens might be eased. Similarly, it might also be worth exploring pooling several businesses within a geography in order to share the cost of shuttle service from nearest the bus stop or centralized pick-up point within Marion County (e.g., similar to the shuttle service Central Indiana Regional Transportation Authority provides to connect the outermost IndyGo routes). These "last-mile" connections are important, particularly in inclement weather, and could provide employees with the support needed to leave their car at home or not have to shoulder the costs of car ownership at all.

Wages. With high personal transportation costs, businesses can help employees meet their household expense challenges by increasing wages. Not only will the employees be better equipped to meet their transportation and housing expenses, the businesses may also benefit from increased employee loyalty generated through this valuable assistance.

Local partnerships. Businesses and municipalities can be powerful partners in finding solutions to workforce challenges. Partnerships between employers and municipalities can provide helpful hyper-local solutions. For example, the City of Logansport, in north-central Indiana, partnered with local businesses to help subsidize local childcare for employees, thus reducing a critical barrier to employment.

WORKFORCE CLIMATE

The panel's analysis of the spatial mismatch between the region's jobs and workforce uncovered several key factors influencing how and where people work. The data may show that the region has the available jobs and the necessary associated workforce, yet how people are choosing to work and how they connect to those places of business paints a more complex and challenging picture.

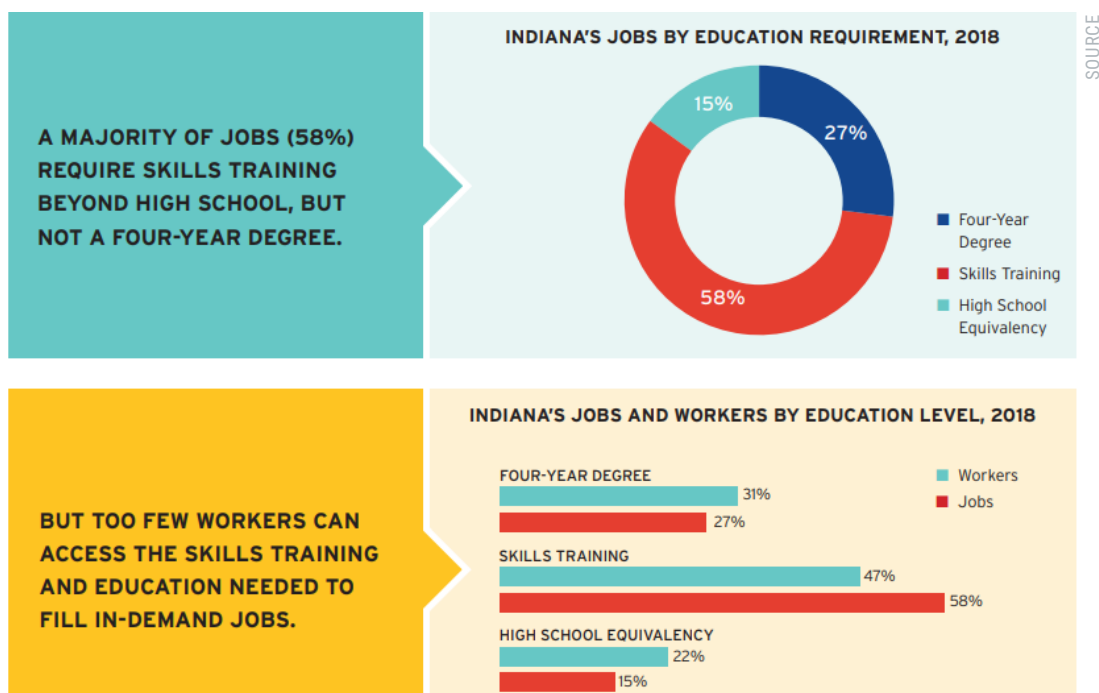
What the Panel Heard

The pandemic and recent economic disruptions further widened the misalignment in talent supply and demand in the region.

- In Indiana, a majority of jobs (58 percent) require skills training that go beyond a high school diploma but not as far as a four-year degree. Further, only 47 percent of Indiana's workers have had access to the skills training necessary to fill in-demand careers.
- Only 43 percent of workers in central Indiana have a job with at least \$40,000 in annual wages and private health insurance. ([The Good Jobs Gap](#))

- Nearly one-third of Hoosiers do not have sufficient income to meet basic needs, including adequate housing, childcare, etc. ([The Center for Women's Welfare Self-Sufficiency Standard](#); [Prosperity Indiana](#))
- The United Way of Central Indiana finds that 34 percent of families in the region are in poverty or are ALICE (Asset Limited, Income Constrained, Employed) households. ([United Way of Central Indiana](#))

These challenges can be found throughout the region but are concentrated in specific geographies and in communities of color. Meeting these challenges by assisting employees and their families through increased wages and/or incentives to businesses and planning for



Skills training is a challenge for many of Indiana's residents.

County	Poverty Households		ALICE Households		Poverty & ALICE Households		Households with Children in Poverty or ALICE	Senior Households (65+) in Poverty or ALICE
Boone	1,466	6%	5,403	22%	6,869	28%	18%	40%
Hamilton	5,213	4%	20,430	17%	25,643	21%	14%	40%
Hancock	1,922	7%	5,838	21%	7,760	28%	19%	42%
Hendricks	3,821	6%	10,963	18%	14,784	24%	18%	38%
Marion	56,307	15%	96,515	26%	152,822	41%	41%	50%
Morgan	2,580	10%	5,643	22%	8,223	32%	31%	39%
Putnam	1,396	10%	3,224	24%	4,620	34%	33%	40%
TOTAL	72,705	11%	148,016	23%	220,721	34%	29%	46%

PROSPERITY INDIANA

Significant portions of those living in the Indianapolis metropolitan area are asset limited, income constrained, and employed.

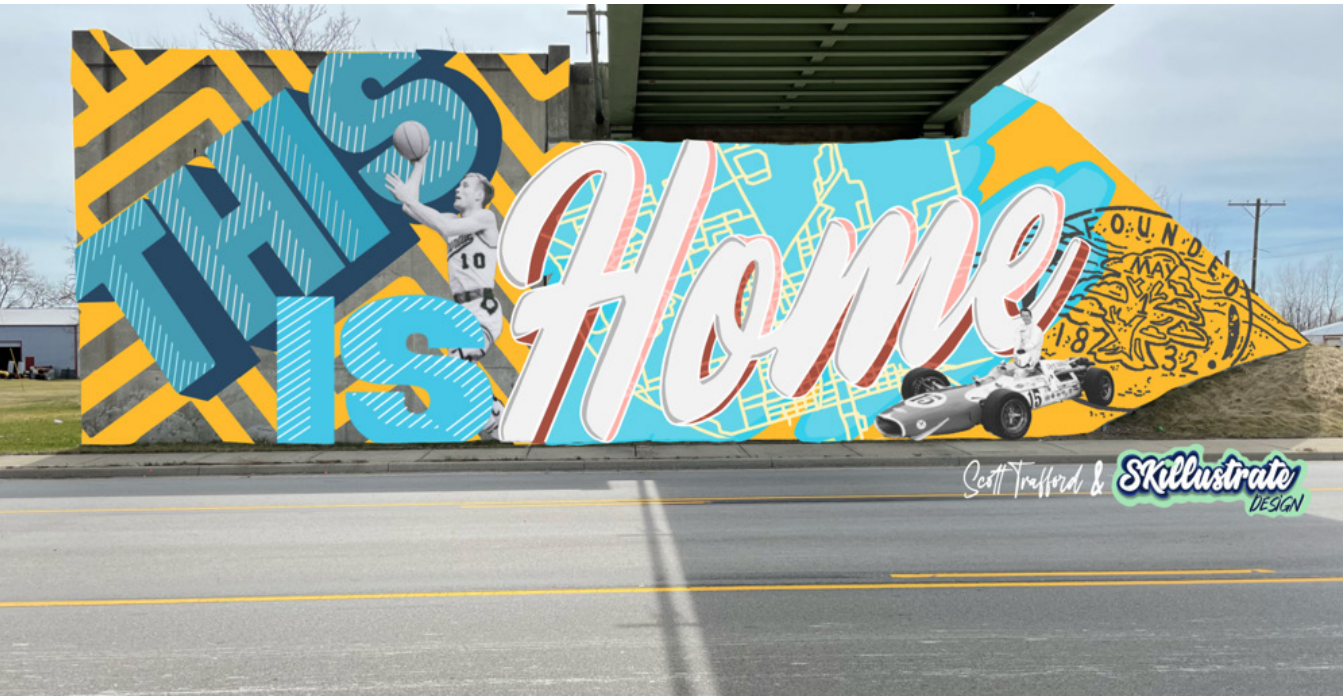
improved access to employment is important for the future success of the region.

It is important to note that, increasingly, people with means, especially generations Z and Y, are choosing where they want to live first based on desired lifestyle, quality of place, and amenities, and then they seek to employment in that location of choice. Employers and localities are pressed to meet the demands of this mobile and highly-selective workforce and are working hard to provide the amenities and lifestyle options this younger generation desires.

There is also a sizable proportion of the population is either place-dependent, due to financial, care-giving, or cultural reasons, or unintentionally transient (*i.e.*, due to economic or housing instability). This population may help meet the workforce needs yet may also require additional training or transportation assistance to reach the open positions.

Who Can Influence Change?

The Indiana General Assembly has asserted final authority over many of the policy levers previously available to local



SOURCE

Placemaking efforts can transform even roadway infrastructure into an appealing addition one's daily commute.

government to address barriers to the workforce. These previous levers include wages, scheduling, and paid leave; housing, including inclusive zoning and tenant protections; and even ‘ban the box’ decisions. It is worth noting that opportunities for light rail in central Indiana have been curtailed by these same legislative measures in the face of broad community support.

While local stakeholders were skeptical about state-wide policy change, local policymakers can still and indeed must be a voice for the workforce needs in their communities if these communities and Indiana more broadly wish to compete nationally for new business locations.

To date, coalitions of stakeholders have been successful in bringing nuance to workforce needs and creating consensus for change.

- The [Indiana Skills2Compete Coalition](#) brings together employers, workforce advocates, and bipartisan policymakers to bring about changes such as the Indiana Workforce Ready Grant.
- The [Hoosier Housing Needs Coalition](#) brought together housing providers and advocates to successfully

increase workforce housing availability, including through eviction filing sealing legislation and through participation in broader conversations such as the General Assembly’s Housing Task Force.

These impactful coalitions are providing the needed influence and amplifying the voices of constituents in critical sectors and can provide models for influence in other areas.

Potential Solutions

Any solutions to removing barriers between the workforce and in-demand jobs must include participation from employers, the workforce, and the community organizations who know the local environment.

Due to the preemption of local policy options, solutions to workforce barriers must be approached at the state level. This state-wide approach includes policies involving poverty reduction, housing stability and affordability, and asset-building and consumer protections, all of which influence and impact the spatial mismatch between central Indiana’s workforce and MDL jobs.



People are increasingly turning to more walkable communities that feature a mix of businesses and uses.

TRANSPORTATION AND ACCESS

The transportation network of central Indiana is marked by interstate highways and bus service, connecting people across distant geographies. While the connections are in place, the distances people travel to reach their places of employment is growing more often than not, with employers, particularly MDL employers seeking sites that are further and further from the urban core, expanding into the far reaches of the surrounding counties. With a significant population still residing in the city's urban core, commuting times are increasing, bus trips are lengthening, and employers are facing a growing challenge of attracting workers to their sites.

What the Panel Heard

Stakeholders were pessimistic about a transportation solution on the horizon – few believe that required transportation improvements can or will happen.

Some interviewees noted that many employers are entering the market without much thought as to how their new workforce will reach the jobs they are creating. Others believe it is time to turn to the employers facing a workforce challenge and ask for their assistance in facilitating improved transportation options. These employers could shoulder some of the responsibility – in leadership and with financial resources – to push for the necessary improvements to the transportation network, which would better connect workers to their jobs.

The state of the current transit network is also a concern, with some stakeholders noting that the network is substandard, not reaching the populations in need nor providing the frequency of service needed to make transit a reliable commuting solution. With a substandard transportation network, too many employees must rely on personal automobiles to reach their jobs. Driving is becoming increasingly more expensive with the average price of automobiles rising five percent over last year.

Who Can Influence Change?

The public sector plays an out-sized role in the delivery of improved transportation networks and better public transit,

yet everyone has a role to play in advocating for improved services.

At the local level, municipal officials can lead the charge, representing the interests of local communities seeking better transportation options. Mayors, council people,

The Importance of Transportation

While not a question posed directly by the TAP sponsor, the panel could not complete the study without analyzing the state of transportation in the region.

The lack of reliable and safe transportation connections to employment centers in the metropolitan area provides a clear mismatch between jobs and workers.

While 93.7 percent of people living in Indiana own a personal automobile, the rest of the population must rely on alternative transportation sources to reach employment. These people include those too young to drive, people who cannot afford an automobile, people with disabilities, and the elderly.

Solutions do not rely solely in the public sector. Private sector employers who desire transit connections to their locations must be willing to bear some of the costs for implementation.

public-sector engineers, planning and public works directors, board of zoning appeals, and plan commission members can all lend their voices and expertise to the pursuit of solutions in a municipality.

Connecting the work of individual municipalities into larger networks is the work of the Indianapolis Metropolitan Planning Organization, helping ensure that no one locality is operating as an island. These regional perspectives and connections also ensure that local planning efforts and improvements will readily connect to other cities' improvements and thus facilitate a truly robust network. Similarly, federal and state legislators should be active participants in the planning and advocacy work, connecting localities to state and federal funding and ensuring that the state is operating as cohesively and efficiently as possible.

Private sector leaders and nonprofit and advocacy groups also have an important role to play. Business leaders can be strong advocates, ensuring that the business case for improved transportation access is aligned with broader economic development efforts, strengthening the region's economic development position. Advocacy groups and nonprofit and nonpartisan experts can provide much needed data, thought leadership, and best practices in support of transportation investments.

Potential Solutions

The potential solutions to support an improved transportation network range from simple actions that can be taken in the next 12 months to complex solutions requiring long-term planning and notable investments. Solutions posed by the panel include:

- Expand transit lines to reach areas of high employment opportunities outside Marion County.
- Improve "last-mile" transportation options from transit stops. These include infrastructure improvements that can support safe bicycle and pedestrian access along commercial corridors.
- Encourage all municipal entities to adopt a Complete Streets ordinance or policy to ensure the inclusion of

infrastructure that safely accommodates all intended users of a corridor. These user groups include pedestrians, bicyclists, people with disabilities, and motorized vehicles. Complete Streets planning also includes space for transit in these corridors.

- Provide employee incentives, such as financial bonuses or equipment, for those choosing to bike to work.
- Promote the [Central Indiana Regional Transportation Authority's Commuter Connect website](#), which provides resources for those interested in ridesharing,

Complete Streets

Complete Streets are streets for everyone. They are designed and operated to prioritize safety, comfort, and access to destinations for all people who use the street, especially people who have experienced systemic underinvestment or whose needs have not been met through a traditional transportation approach, including older adults, people living with disabilities, people who cannot afford or do not have access to a car, and Black, Native, and Hispanic or Latino/a/x communities. Complete Streets make it easy to cross the street, walk to shops, jobs, and schools, bicycle to work, and move actively with assistive devices. They allow buses to run on time and make it safe for people to walk or move actively to and from train stations.

Creating Complete Streets means transportation agencies must change their approach to community roads. By adopting a Complete Streets policy, communities direct their transportation planners and engineers to routinely design and operate the entire right of way to prioritize safer slower speeds for all people who use the road, over high speeds for motor vehicles. This means that every transportation project will make the street network better and safer for people walking, biking, driving, riding transit, and moving actively with assistive devices—making your town a better place to live.

www.SmartGrowthAmerica.org

vanpooling, or finding a “bike buddy” to share the work commute.

- Provide local leaders with the tools and citizen support to expand transit connections and improve street infrastructure.
- Facilitate increased access by non-motorized means, including electric bicycles. This can lead to a significant reduction of personal transportation costs and, by freeing those dollars to be spent elsewhere, may provide employees with new funding to spend on housing closer to their places of employment.

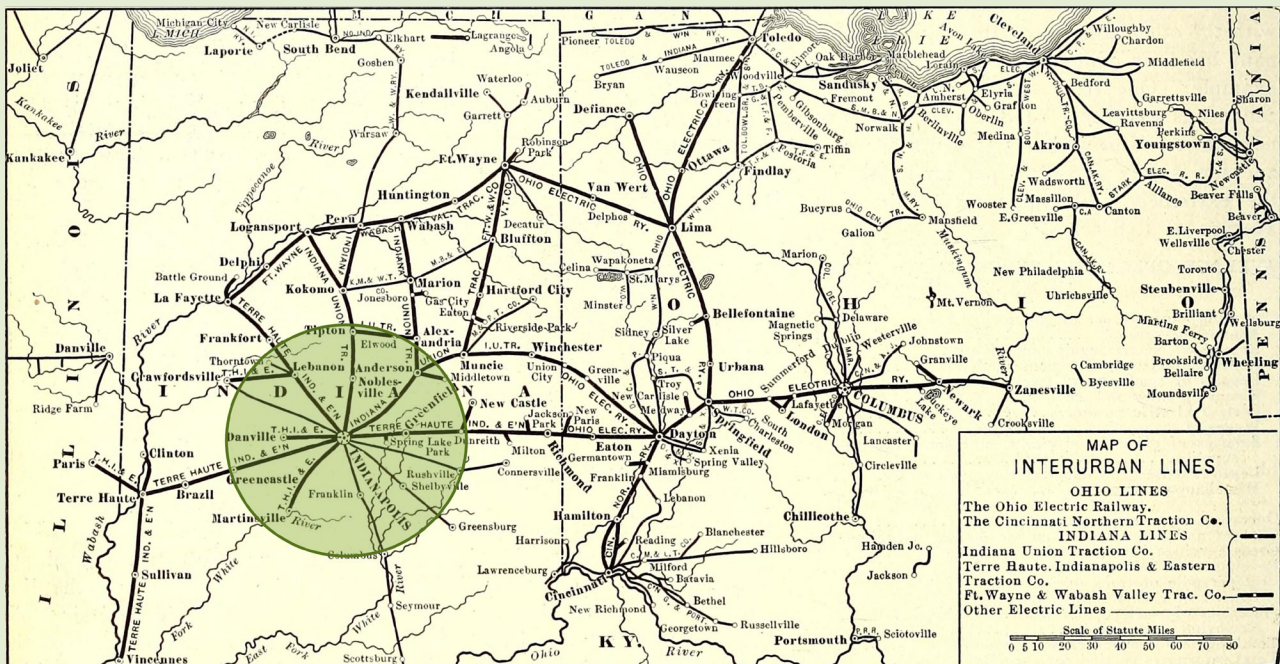
Transportation is expensive – roads, bridges, and transit lines are expensive to build and personal automobiles are expensive to purchase and maintain. Comprehensive, long-term planning today will go a long way in supporting the region’s future transportation network and helping to ensure that the workforce can continue to easily reach places of employment.

A Note on Light Rail in Indiana

The panel included a recommendation to consider reviving old-interurban rail lines for light rail use, however light rail is effectively banned in Central Indiana by law. When the state legislature changed the law to allow for Central Indiana residents to conduct referenda for transit, they excluded light rail projects from the eligible projects. It does not prevent the construction of light rail

in Central Indiana, but transit referendum dollars cannot be used to fund its operation. This has created a barrier for improving the region’s transportation network.

Presently, referendum dollars collected after the successful transit referendum in Marion County in 2016 provide the funding source for IndyGo’s local route improvements and BRT frequency.



HOUSING ENVIRONMENT

Across the nation, cities are wrestling with the increasing costs of housing, and housing affordability is no longer just a topic for markets like San Francisco and New York City. As construction costs have skyrocketed and the supply of new housing has slowed, individuals and families are struggling to find adequate housing with incomes that have not kept pace. The result is often a push to more distant, less expensive suburbs with longer commutes, or, as in central Indiana, a further separation of the people who can afford to move from those who are essentially locked in place, close to the urban core where they have better access to services, transportation, and other types of jobs.

What the Panel Heard

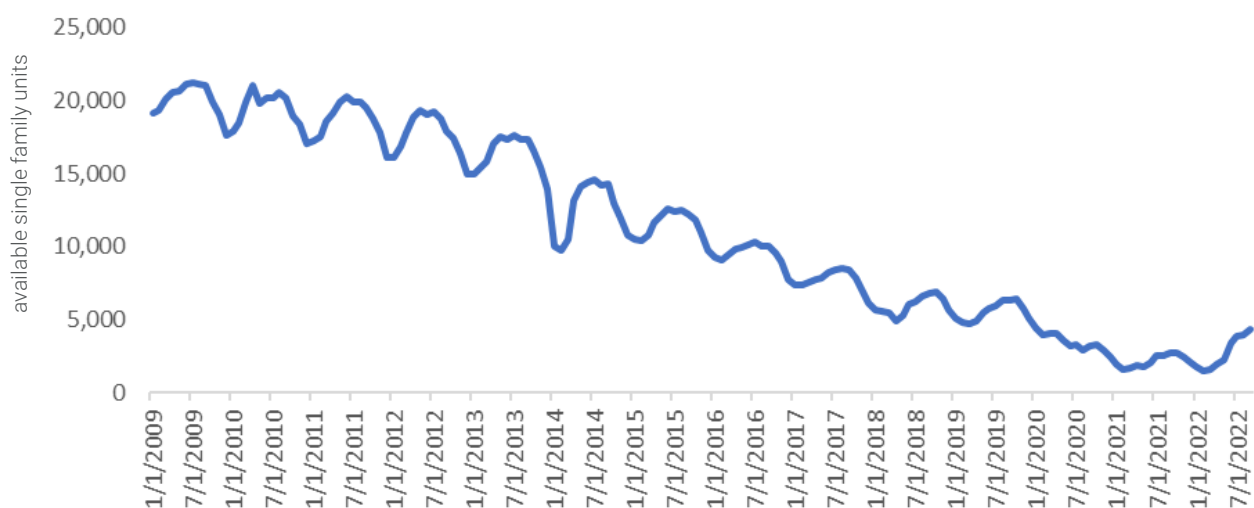
In central Indiana, there is a clear mismatch between jobs in the region and available and affordable housing. Of the latter, the supply is not sufficient to meet the market, the price point is too high for many, the single-family product type is too limited, and the new location of the majority of new housing is not where the need is the greatest.

The affordability of the region's housing is a challenge. New housing is expensive, with stakeholders noting that new construction averages around \$350,000 for a single-family

home, a pricepoint out of reach for a significant portion of the population. When viewed at a macro level, housing in Indianapolis is often considered affordable, yet when transportation costs are added to the equation, households frequently spend 50 percent or more of their income on just housing and transportation.

Workforce housing could provide a solution, but there are barriers to overcome. Financing these projects is challenging as most must rely on tax credits and complex capital stacks to make the numbers work. The political will to support these projects and developer expertise

ACTIVE INVENTORY, SINGLE FAMILY, BLC® SERVICE AREA:
2009-2022(10)



Source: MIBOR REALTOR® Association, BLC Listing Service

The BLC® Listing Service Area includes Bartholomew, Boone, Brown, Decatur, Hamilton, Hancock, Hendricks, Jackson, Jennings, Johnson, Madison, Marion, Montgomery, Morgan, Putnam, and Shelby counties.

vice

— ACTIVE INVENTORY

Housing + Transportation Affordability

Economists often highlight Indianapolis as an affordable place to live. When factoring the price of transportation, Central Indiana’s affordability all but vanishes.

	Housing Cost (% of income)	Transportation Cost (% of income)	Housing + Transportation Cost	Average Household Income
Boone	32%	27%	59%	\$83,100
Hamilton	35%	26%	61%	\$98,200
Hancock	27%	27%	54%	\$74,100
Hendricks	29%	26%	56%	\$81,900
Johnson	27%	26%	53%	\$72,400
Marion	22%	23%	45%	\$48,000
Morgan	24%	27%	50%	\$64,300

Housing and Transportation Affordability Index

required put the deals together to build workforce housing often limits the supply as there is too few of each in most markets. In central Indiana, there are a few political leaders who have expressed a willingness to change zoning ordinances to encourage more affordable housing and denser development, but they still face a certain degree of resistance to this type of development from constituents.

There is an interest in housing diversity. Whether it is a reaction to endless streets full of similar single-family homes or a wish to return to times of walking to the corner market, people are expressing interest in more diverse housing options. A vibrant mix of densities, typologies, and price points can create a more interesting and sustainable place to live, where people can find housing at all stages of life. This mix of housing types can also contribute to an enhanced neighborhood and community quality-of-life, which is a critical factor in where people choose to purchase a home.

Why It Is Important

In cities like Indianapolis, where public transportation may not be an adequate option, the location of housing that meets the needs of workers is critical.

- The lack of adequate housing supply is the biggest

challenge facing the region.

- The lack of diversity of housing options is also critical in that many communities are not able to provide a range of prices, types, and densities that meet the needs of the workforce.
- People want to have a variety of housing options within their community, so as their housing needs change over time they can move within the same community with relatively little disruption (*i.e.*, age in place).
- Many Black residents still experience housing disparities as a result of historic redlining and discrimination. This also affects other populations of color and immigrant communities.

In addition to the location, type, and price of housing, people also expect their communities to invest in quality-of-life amenities, providing schools, shopping, and recreational options relatively close to home.

Potential Solutions

While solving the broader affordable housing challenge is beyond the scope of this one study, there are steps that can be taken today to better equip the region to

advance progress.

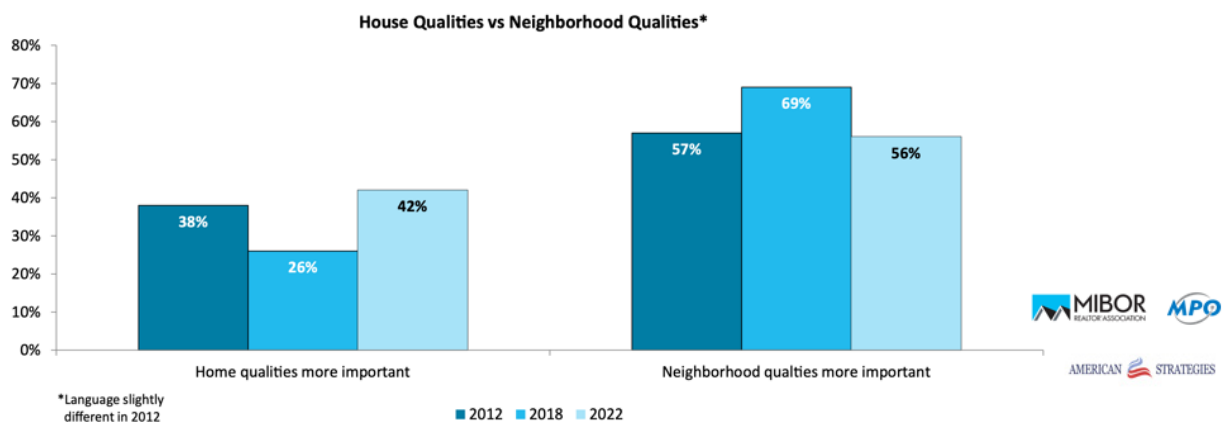
- Regional leadership needs to fully understand the current state of housing options across the region.
- Stakeholders will require information and education on the need for diverse housing options by price, type, and location.
- Communities need to invest in quality of place by creating opportunities for people to come together, providing options for meeting daily needs close

by, and investing in public infrastructure that helps residents connect to jobs, housing, and one another better.

- Finally, regional leaders and the private sector need to increase the supply, access, and habitability of housing across the region. This is a all-hands-on-deck moment for everyone involved.

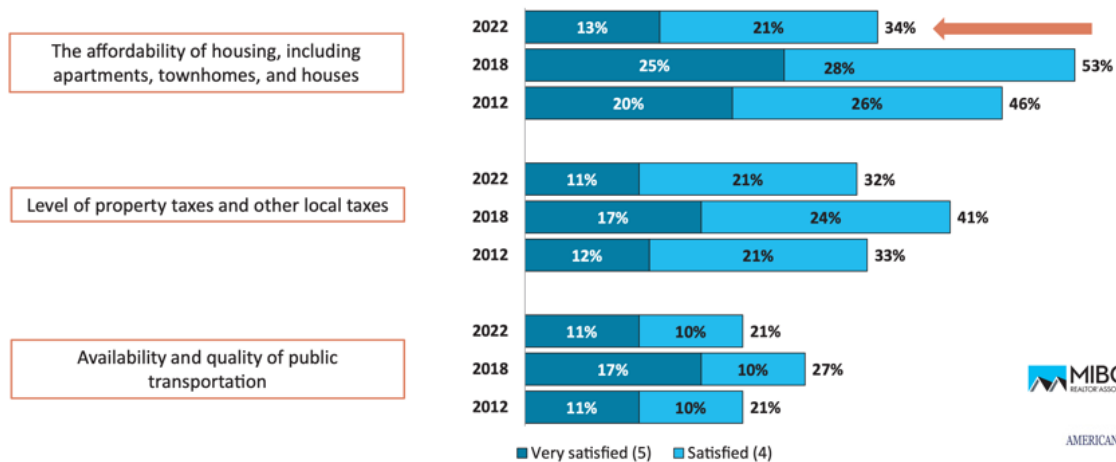
Over Half Put Neighborhood Qualities Before House Qualities

Percentage of those who say house quality is more important increases from 2018



Significant Drop in Satisfaction with Housing Affordability

Satisfaction with community on a scale of 1 to 5



ECONOMIC DEVELOPMENT AND POLICY CONSIDERATIONS

Central Indiana, the “crossroads of America,” has excelled at attracting MDL businesses and has built an impressive economic development strategy around the sector. As the sector has grown, and expanded further out from Marion County and the central core of the region, the strategy is having unintended consequences, further separating workers’ homes from their places of employment and exacerbating transportation issues.

The size and complexity of Indianapolis/Marion County and its Unigov structure pose different challenges than those faced by the individual surrounding communities and, as such, would benefit from a more nuanced economic development strategy.

What the Panel Heard

A significant part of Indiana’s economic development strategy has been built around logistics and transportation.

Increasing automation. While the MDL industry has historically been a labor-intensive one, it is quickly automating. As the sector continues to grow, these businesses are anticipated to also grow in employment in the near-term and then shrink considerably due to ongoing and increasing automation. This trend raises a question around the viability of a MDL pursuit-focused economic development strategy. Is the region putting too much energy into going after jobs that may be less relevant in the future? As MDL jobs transform and become less labor intensive, the region needs to identify the up-and-coming industries, understand what and how MDL jobs will be replaced, train for it, and hit the ground running.

Pursuit of the known. In some instances, stakeholders noted that economic development champions in other municipalities are choosing to not participate in the conversation around the next wave of industry for the region. City professional staff who have demonstrated an interest in researching and pursuing this next-gen work are, in some instances, encouraged otherwise; these industries have become “a non-starter” in some communities’

economic development plans with leaders instead choosing to pursue only the known and familiar MDL path.

Availability of land. The availability of greenfield land has driven industrial development and Indiana’s success in this sector farther and farther from the urban center. While the region is attractive to logistics operations, not every community has the available land these rather sprawling users often require. Marion County has to be intentionally selective with the limited amount of available land while other communities are essentially giving land away to attract new businesses.

Public policy education. Local-level public policy does not always have the ability to support or wholly implement quality-of-life improvements alone. To be effective, policy development to address the workforce/jobs mismatch requires multiple levels of education on all aspects of workforce issues, including housing, transportation, and more. This education needs to reach across a broad spectrum of stakeholders – from policy makers to members of the general public – so everyone can understand the challenge and begin to see their role in potential solutions. Making what may seem like a theoretical challenge real, being able to “see and touch” real examples of this misalignment, can help policy makers and community members advance this discussion and arrive at sustainable solutions together.

Creativity in transportation. When public policy efforts are moving too slowly or not having the needed effect, some enterprising communities and neighbors are

getting creative and taking the initiative to implement their own solutions on a hyper-local level. For example, an immigrant community on the east side of Marion County has organized its own shuttle solution for the benefit of community members needing transportation assistance.

The Indianapolis metropolitan area, and perhaps the broader State of Indiana, may have ascended to a level where the status quo is no longer working. Indianapolis competes well for new projects but is having difficulties closing the deal. Much like the Peter Principle, where employees rise through an organization until they reach a level of incompetence, requiring new skills and training to be effective, the region may require a more rigorous approach and new economic development strategy to continue to develop and grow. This approach could include raising the floor of benefits, training, and employee services, which may help the region develop its workforce and eventually be more attractive to new businesses seeking an Indiana location. Some may recall the Amazon HQ2 location pursuit and the associated lessons learned when the region fell short.

Who Can Influence Change?

Policy professionals and law makers at all levels of government – local, regional, and state – have an important role to play and will be more effective when working in concert with one another. Economic development professionals and allied organizations should lead the conversations around economic development goals and pursuits, identifying the opportunities for growth and development as well as helping to detail the barriers in the way. Similarly, individual MDL business owners and the sector collectively should engage in the process and actively inform the conversation with practical and timely information and examples. Finally, the people of the

region are also in a position of influence. Whether through employee-organized actions that help connect people to jobs, as in the case of the entrepreneurial immigrant community's shuttle system, or residents who participate in the local policy process through conversations with their elected leadership, no one should sit idly by, waiting for someone else to influence change and fix the misaligned system.

Potential Solutions

Solutions in the areas of economic development and policy change will require collaboration and connection. The region has demonstrated its ability to come together in the pursuit of significant regional employers, again as seen with Amazon's HQ2 pursuit. This type of regional collaboration is needed, however, on an on-going basis, in pursuit of a collective raising of the tide across counties. This on-going and diffuse work requires an effective network of professionals working in the economic development space to see and connect previously disconnected efforts to create something that is stronger together.

Careful attention should also be paid to the emergence of new technologies and associated industries that will likely influence the future economic health of the region. Today's "sweet-spot" business sectors for the metropolitan area, notably here the MDL sector, are constantly innovating and improving workflows. Knowing this, the public sector and all related influencers must to establish a full and evolving understanding of the impact of technological advances (e.g., automation) on the future of the MDL sector. Further, those same public sector professionals and influencers can collaborate with the private sector on efforts to forecast emerging opportunities and develop advance training and business attraction policies to meet the needs of this rapidly-changing business sector.



COMMUNITY AND LAND USE PLANNING

MDL businesses moving into the metropolitan area are often in the catbird seat, making site selection decisions with the full support of public sector leaders who may be overly interested in the political feather of a new business win. There are land use decisions made in the interest of economic development today that may have lasting and negative consequences on the health and vibrancy of the community tomorrow.

What the Panel Heard

Historic land use planning practices, featuring walkable communities and a mix of uses, shaped cities that were relatively dense, economically sustainable, and generally affordable for the majority of the population. Post-World War II planning practices veered dramatically, shifting instead to an emphasis on individuality, personal home ownership, and the convenience of a personal automobile. Communities spread out further from the urban core and connections were reliant upon cars.

Today, people are recognizing the value of those historic planning principles and the walkable environments they created. Neighborhood nodes, whether currently in existence or strengthened through intentional densification, can provide people with opportunities to live and work in close proximity. Placemaking in these areas help make these neighborhood nodes even more enjoyable and desirable over time. Additionally, through thoughtful integration of typically divergent land uses, these

neighborhood nodes can become even more viable as complete communities, featuring a mix of people, activities, and transportation modes in each neighborhood.

In many instances, development appears to be guiding community rather than the community directing development. This has resulted in a generational change in the makeup of communities on a parcel-by-parcel basis, 1,000 acres at a time. As an example, stakeholders noted that zoning variances were being approved in bus rapid transit corridors to provide space for surface parking lots, in direct opposition to the community development policy that was in place.

Who Can Influence Change?

Community development and land use planning decisions are often shaped at the local level and guided by state policies. As such, both state and local elected officials can influence the process with input from residents, community-based organizations, and the business community. Public and private economic and community development officials and thought leaders can provide valuable insights and best practices gathered from similar successful endeavors from counterparts in other cities, bringing those ideas back home to the benefit of the local community. Finally, members of appointed boards and commissions who deliberate and act upon requests for development approval and the professionals who advise them are all key influencers as well as actors in the process.

Are our current land use decisions tracking with what we want to have happen in our communities or are there policies that can help guide this progress?

– Stakeholder



Potential Solutions

Once again, collaboration and education are key to solving these regional challenges. It is possible that elected officials can be engaged more deeply in efforts to coordinate development policy across the region based on a shared, unified vision for the region. Professional staff and consultants who work in community development and land use planning should also be engaged in the

work, leveraging their knowledge and experience to bring best practices to the table and guide paths toward implementation. Throughout the process and beyond, intentional and on-going training should be provided to decision makers and those involved in the development approval process, helping ensure all are properly equipped with the tools and information they need for the work at hand today as well as the plans for tomorrow.

RANKING OF CONTRIBUTING FACTORS

In the questions posed to the TAP, the sponsor asked that the panel rank or quantify the degree to which each of the factors discussed in this report contribute to the spatial mismatch of workers and jobs in the Indianapolis metropolitan area. The panel strongly believes that each of these factors should be addressed and each are critical to the success of the region. The following ranking outlines subtle priorities, but the entire list is worthy of attention in the pursuit of alignment.

1. **Policy and economic development strategy.** Everyone, from individual business owners to municipal officials, should be able to identify with, understand, support, and benefit from a regional policy and economic development strategy.
2. **Political will.** While some may argue that this should be first on the list, political will is critical to advancing initiatives but should be supportive of and work to advance the regional economic development strategy – not the other way around.
3. **Business decisions and site selection.** Businesses are drawn to a site for a host of reasons, but the businesses should not be driving the decisions in a community. The community-driven strategy sets the table and invites businesses into the conversation.
4. **Lack of transportation options – expanding transit options and non-motorized transportation.** An effective transit network, inclusive of all modes of transportation, is critical to the region and needs to be elevated in conversations about regional competitiveness.
5. **Workforce – it is a people problem and a people solution that involves training, childcare, and wraparound services.** The people who can fill the MDL positions live in the region, yet there are significant gaps in the delivery of critical services that would support workers and their families. Those gaps – in childcare, transportation, training, and the like – are frequently too wide to bridge with the region's current service offerings.
6. **Lack of housing supply (diversity and options).** The single-family housing market is driving the current housing supply, with purchase prices and rents far outpacing increases in wages. More diverse and affordable housing options are a must for the region.

FUTURE THINKING

It is clear that there is a spatial mismatch between jobs and workers in central Indiana and the panelists' professional experience, research data, and interviews with community stakeholders, municipal officials, and municipal professional staff confirm that fact. There is not, however, consensus as to the root of the problem or who is responsible for a solution.

The questions posed to the TAP are pertinent today, but advancements in the MDL industry are moving at a speed that may make today's solutions, such as building more housing proximate to MDL campuses, obsolete in ten years, or, even more likely, five.

Are we asking the right questions?

Are we solving for 40 years ago instead of today?

Are there changes coming that will replace these outstanding issues with an entirely new set of problems?

In reviewing the purposes and intended outcomes of today's policies and strategies, it is critical that those policies are resulting in critical change and advancement and are not instead retrenching and recreating issues of the past.

The questions asked today must evolve with technological advances, and policy makers and community leaders need to think beyond the next ten years.

- If cities add hundreds of units of workforce housing around large industrial sites in greenfield sites, as those businesses automate, what will happen to the residents when the jobs are eliminated?

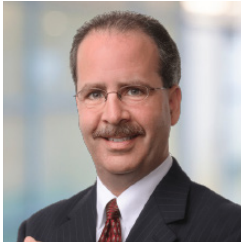
- What types and sizes of communities and quality of life will exist between the industrial parks?

As one stakeholder noted, "We are still building for an American Dream that doesn't exist, and people on both sides of this issue want a diversity of options." Central Indiana's municipal and civic leadership needs to focus on eliminating the barriers that are preventing those lifestyle options from becoming a reality for most of the region's population. To that end, the IMPO can play a leadership role in centering racial equity in their planning efforts, increasing awareness and finding solutions for the region that will provide access for and, indeed, benefit all.

Both local and regional strategies will be needed, strategies created by intentional coalitions that are charged with considering the needs and impacts on businesses, potential workers, local decision-makers, and service providers alike.

Ultimately, the region needs to chase, incentivize, support, and build businesses that will be in the metro area for the long-term and help build community.

ABOUT THE PANEL



Kevin Buchheit

**Panel Chair
Land Planner
Kreig DeVault**

Kevin Buchheit, an urban/land use planner, is a member of the firm's Real Estate and Environmental, Commercial and

Real Estate Lending and Municipal Practice Groups. Mr. Buchheit's career spans two states and more than 35 years, during which he worked at the small town, city, county and state levels advocating for sound community planning. His range of experiences covers the spectrum of community development from planning and zoning to impact fees and code enforcement. A Certified planner, Mr. Buchheit has been involved on the boards of two state chapters of the American Planning Association; he is a Past President of the Indiana Chapter where he has been an active member for more than 25 years. Mr. Buchheit currently serves on the Management Committee of the Urban Land Institute Indiana Council and as co-chair of its Technical Advisory Panel Committee.



Mitch Barloga

**Northwestern Indiana Regional
Planning Commission**

Mitch Barloga is a Chicagoland planning professional with 25 years of public sector experience, including 19 years with two Metropolitan Planning

Organizations. Mitch's primary focus is in active transportation project programming and management. His expertise also includes a strong knowledge of Metropolitan Planning Organization processes and functions, federal and state project programming and budgeting, team management, consultant supervision, public speaking, social media outreach, meeting facilitation and citizen engagement. Mitch is the author of five award-winning regional planning documents, which has led to over \$70 million of municipal quality of life investments, and he serves as board president for three nonprofit corporations.



Andrew Bradley
Prosperity Indiana

Andrew Bradley is the Policy Director for Prosperity Indiana, a statewide membership organization for the individuals and organizations strengthening Hoosier communities. Since its founding in 1986,

Prosperity Indiana has grown to approximately 200 members, currently representing 900 community economic development practitioners from public, private, and nonprofit sectors. As Policy Director, Andrew works to craft and advance Prosperity Indiana's policy agenda in coordination with PI members. He is skilled at analyzing data to extrapolate needs related to policy change and is responsible for producing advocacy tools, building relationships with policymakers, activating members to contact legislators, and coordinating policy convenings.



Traci Kapsalis
Jones Lang LaSalle

Traci Kapsalis is an Executive Vice President of Agency Leasing on the Investor Services team and is responsible for a 2.6 million square foot, Class A office portfolio including Parkwood

Crossing, Market Tower, and Woodland Corporate Park. Prior to joining JLL, Traci was Vice President of Leasing and Development for Duke Realty's Indianapolis Group. Traci joined Duke Realty in October 1998 as a Marketing Coordinator for the St. Louis, Minneapolis, and Indianapolis markets. In July 1999, she was promoted to Marketing Manager, where she was responsible for managing the marketing budgets and creating and executing strategies to minimize vacancy in these markets. In February 2001, she moved to Indiana Office Group as a Leasing Representative and was promoted to Senior Leasing Representative in 2005. In 2008, she was promoted to Vice President, Leasing and Development. She has led her business units' committees on CCS, occupancy, and land strategies and has maintained one of the highest occupancy rates in the company for the last five years. In 2014, She was one of the top six leasing representatives in the company.



Chris Pryor

MIBOR REALTOR Association

Chris Pryor has spent 28 years in the real estate industry, joining MIBOR REALTOR® Association (MIBOR) in 1994. He currently serves as the Chief Advocacy Officer. MIBOR, the profes-

sional association that represents central Indiana's REALTORS®, serves a 12-county region and nearly 10,000 members. Chris works as an advocate on housing industry issues and leads the association in engaging in community and economic development initiatives to enhance quality of life in communities across central Indiana. During his tenure with MIBOR, he has also served as the Chair of the National Association of REALTORS® Government Affairs Directors Institute. Chris has served in a variety of additional leadership roles including the Greater Indianapolis Progress Committee (GIPC) Board of Directors, Chair of the Central Indiana Regional Development Authority and the Urban Land Institute Advisory Board. Chris has a Bachelor's Degree in public affairs from Indiana University and is a graduate of the Oklahoma University Economic Development Institute. A lifelong Hoosier, Chris is married to wife Kelly and has two sons, Ethan and Grant. Outside of work he enjoys spending time outdoors with his family.



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