Urban Land Institute
Advisory Services Program

Sewanee: The University of the South

SEWANEE, TENNESSEE
ULI ADVISORY SERVICES PANEL
APRIL 3-8 2022

About the Urban Land Institute

ULI Mission: Shape the future of the built environment for transformative impact in communities worldwide

- A multi-disciplinary membership organization with more than 45,000 members in private enterprise and public service

- What the Urban Land Institute does:
  - Conducts Research
  - Provides a forum for sharing of **best practices**
  - Writes, edits, and publishes **books** and **magazines**
  - Organizes and conducts **meetings**
  - Directs outreach programs
  - Conducts **Advisory Service Panels**

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ADVISORY SERVICES PANELS

Since 1947, ULI's Advisory Services Panel program has helped more than 750 communities find independent, strategic, and practical solutions for the most challenging land use issues.

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Thank you to our Sponsor

Thank you to our Valued Stakeholders

ULI Panelists and Staff

Selected for their subject matter expertise to provide **objective, volunteer** recommendations

Richard Gollis
Panel Chair
Co-Founder & Principal
The Concord Group, LLC
Newport Beach, CA

Greg Cory
Principal
Land Use Economics, LLC
San Francisco, CA

Suzanne Maddalon
SVP, Marketing
Freehold Communities
Austin, TX

Glenn Walters
Principal
Design Workshop
Asheville, NC

Doug Abbey
Co-Founder, IHP Capital
Partners
San Francisco, CA

Edward Henley III
Founder & Principal
Pillars Development
Nashville, TN

Rob Rydel
Principal
OZ Architecture
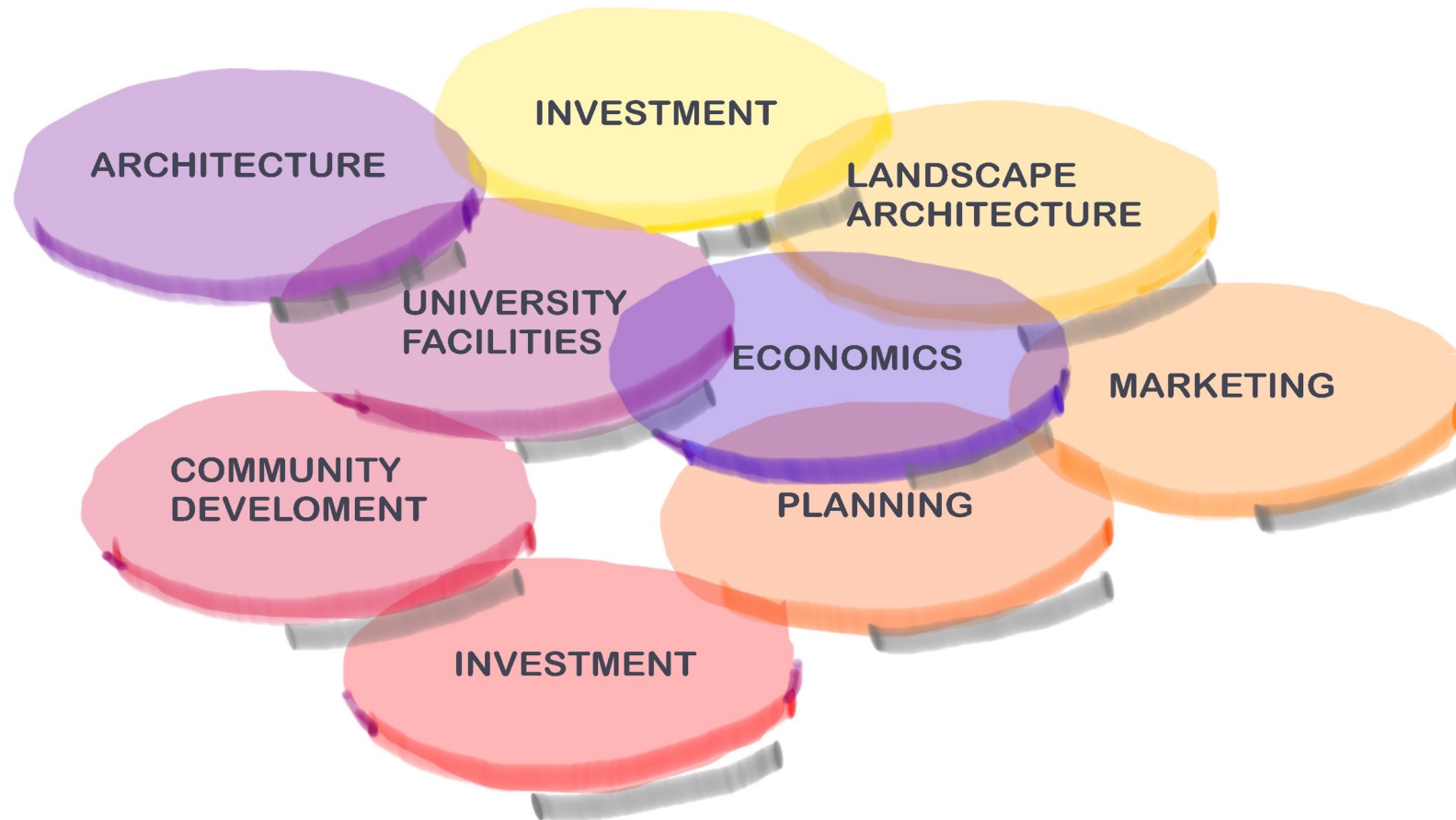Denver, CO

Warren S. Whitlock
Racial Equity, Diversity &
Inclusion
Valley Water
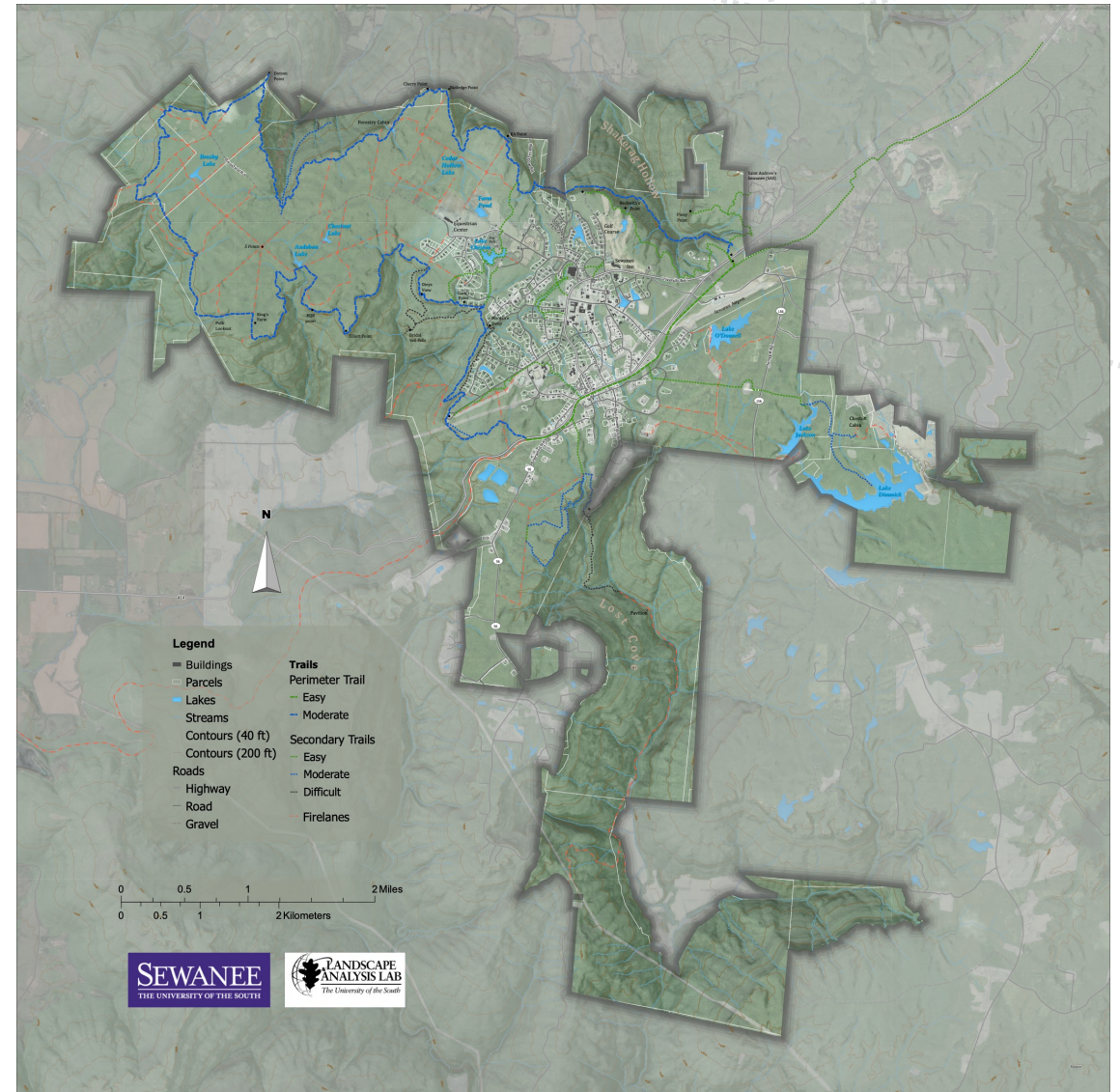San José, CA

ULI Staff
Mary Beth Corrigan
EVP, Global Leadership

Barbra Gustis
Director, Advisory Services and Key Leaders

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Team Expertise

Why We Are Here

- Prepare action plans for ongoing streams of incremental revenue to support the University's mission

- Identify domain (including the Village) opportunities for short-term investments that will create economic benefit for all of Sewanee

Legend
- Buildings
- Parcels
- Lakes
- Streams
- Contours (40 ft)
- Contours (200 ft)
- Roads
  - Highway
  - Road
  - Gravel

Trails
Perimeter Trail
- Easy
- Moderate

Secondary Trails
- Easy
- Moderate
- Difficult

Firelanes

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Panel Process

- Review briefing book and other materials

- Meet with the Sewanee: The University of the South and colleagues

- Tour The Domain and surrounding areas

- Conduct interviews with stakeholders

- Analyze and debate issues

- Brainstorm strategies and recommendations

- Present findings and recommendations

- Final Report delivered within 6 weeks

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Headline: "Urgency to Move Fast"

- Liberal arts college headwinds create sense of urgency
  - 20% fewer students by 2026 ("Demographic Cliff")

- Metrics of Success in 5 years
  - Academic Ranking
  - 1,700+ high achieving students
  - Top quality faculty and staff living on The Domain
  - Financial sustainability

- Action Items
  - Priority investments and development opportunities
  - Financing, delivery, management structures to get it done

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Scope of Presentation

- Market Insights

- Innovation and Place Making

- Community Engagement

- Marketing Initiatives

- Housing Segments and Typologies

- Village and The (Broader) Domain

- Other Domain Opportunities

- Implementation

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Market Insights

The Housing Threats to Success

- Decline in faculty living on the domain.

- Large price increases "driven" by demand from second homebuyers.

- Homebuilding process intimidating to junior faculty. Rising construction costs.

- Shortage of rental stock from seminarians and mid-level employees.

- Deteriorating rental stock.

- Lowest density campus in America!

QUALITY

QUANTITY

TYPES

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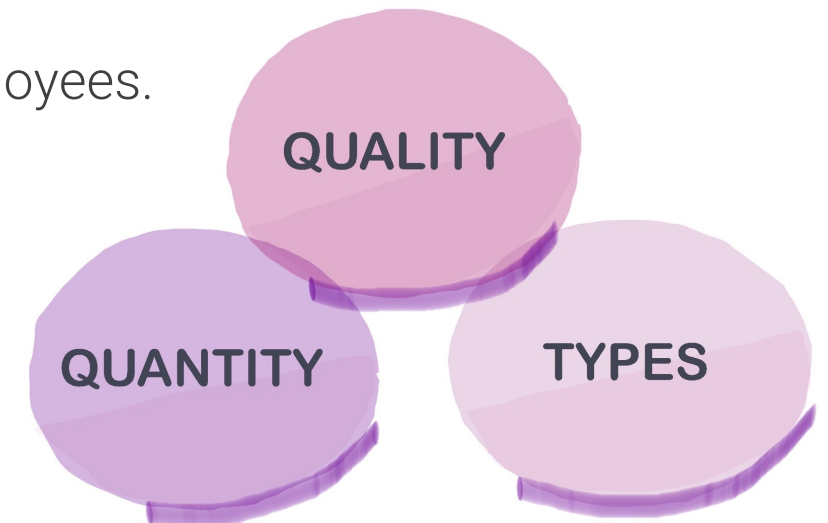
Housing Typologies and Prices

Metrics	Flats	Town Homes	Cottage Courts	Bungalows	Family Homes
Home Sizes (sf)	800	1,250	1,450	1,700	2,000
Rents (per mo)	$1,020	$1,450	$1,450	$1,750	$2,200 +
Household Income	$35,000	$50,000	$50,000	$60,000	$75,000 +
% Faculty/Staff*	20%	25%		30%+	
Prices (Excluding land)	$200,000	$250,000	$300,000	$350,000	$450,000 +
Household Income	$45,000	$55,000	$65,000	$75,000	$100,000 +
% Faculty/Staff*	11%	14%	14%	22%	40%

*Per 2018 Survey

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Recommendations

- Build rental housing: 25-unit phase 1.

- Provide "turn-key" home sale program for employees.

- Revise ground lease to ensure long term affordability, availability, and commercial reasonableness.

- Densify campus core (accessory dwelling units): enhance walkability.

- Repair/replace deteriorating homes.

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Ancillary Developable Real Estate

- Identify, assess, and prioritize land outside campus core that is well-suited for development.

- Prepare lots for sale.

- Additional development adds vitality to community.

- Dispose of noncontiguous excess real estate.

- Seek location for retirement community.

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Lodging

- The Sewanee Inn has been an unqualified success.

- Expand Sewanee Inn: possible for-sale villas.

- Market for limited-service hotel at a more affordable price point, and targeted towards the recreational user/outdoor enthusiast.

- Preferred location is within Village area to provide walking connectivity to the campus and Goat Mountain Trail.

- Limited-service hotels have no on-site food and beverage; spending will transfer to the Village.

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Retail

- Existing density is too low to support active retail market.

- Consumer spending drives our economy.

- Limited population growth within 10 miles of The Domain.

- Existing household shopping needs are already satisfied by the established merchants.

- New retail development not warranted at this time.

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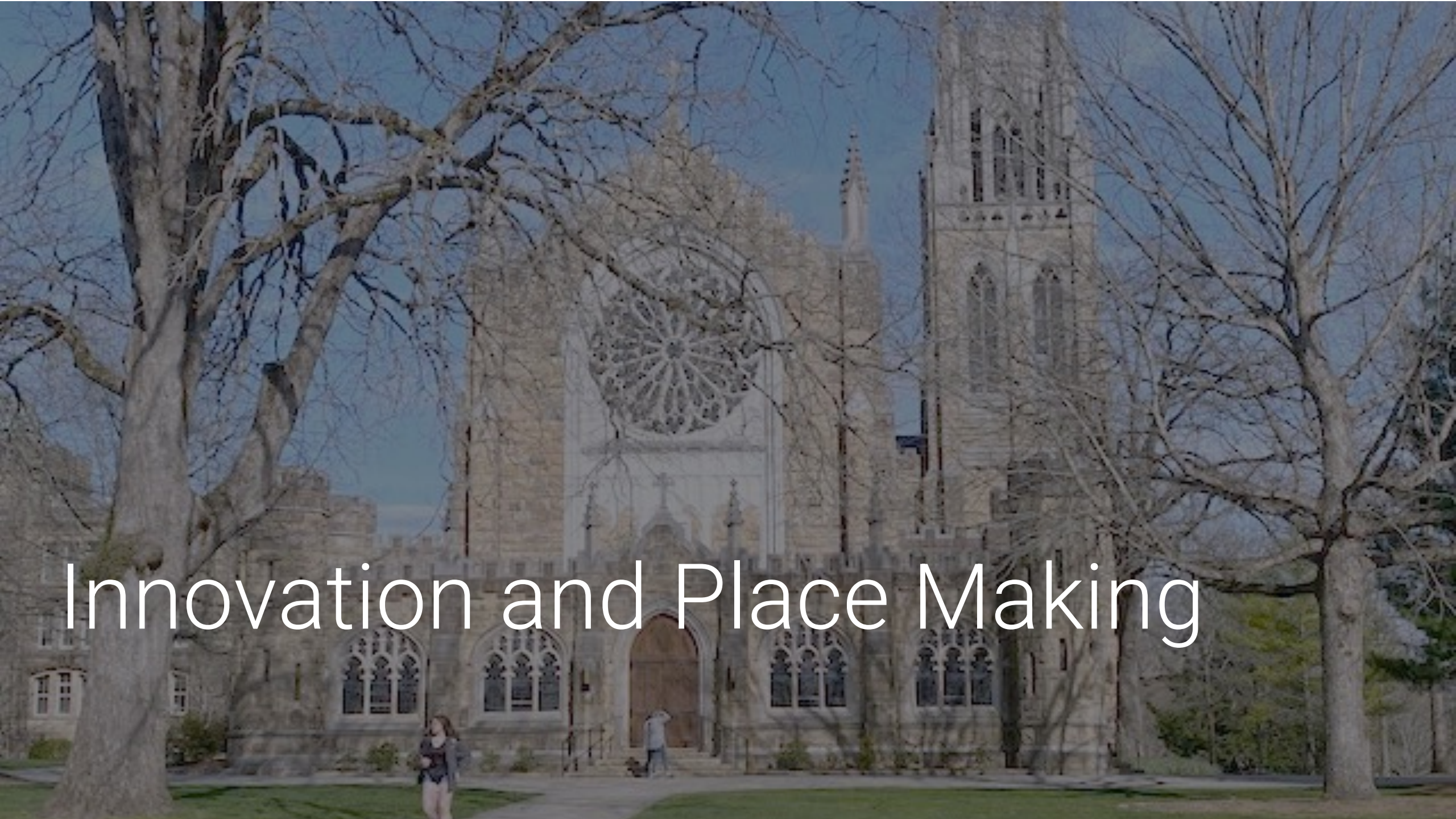
Innovation and Place Making

Innovation and Place Making

Creating a sense of place

through integration and activation

Curating the Appropriate Retail Experience

At current, the economic landscape does not support an intensive increase in retail.

Identify and place appropriate offering(s) into the community so they are likely to succeed.

Managing and addressing factors that can be controlled:

- Minimal rent and other operating costs
- Clean, open and modern spaces with functional equipment
- Provide offerings that don't compete with current ones, yet offer a variety and spectrum of dining or services
- Expand dining program and spending usage on offerings into the area.
- Utilize Sewanee Dining Advisory Group (SDAG) for current and new offering.

Encourage a sense of place through the public realm.

- This is activation that creates a sense of belonging, safety (eyes on the street) and vibrancy

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The Public Realm is Sewanee's Responsibility

Perception is reality.

*When an area is perceived as unsafe or lesser than,
it becomes such in the minds of people and the community.*

Beautification

Connection

Renovation/New Development

Planning for Growth

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Innovation District

According to the Brookings Institute, an innovation district thrives when these five (5) characteristics are enacted:

"Build a collaborative leadership network"

"Set a vision for growth by providing actionable guidance for how an innovation district should grow and develop in the short-, medium- and long-term along economic, physical and social dimensions."

"Pursue talent and technology given that (1) educated and skilled workers and (2) sophisticated infrastructure and systems are the twin drivers of innovation."

"Promote inclusive growth by using the innovation district as a platform to regenerate adjoining (potentially) distressed neighborhoods as well as creating educational, employment and other opportunities for low-income residents of the city.

"Enhance access to capital to support and steward the innovation ecosystem. "
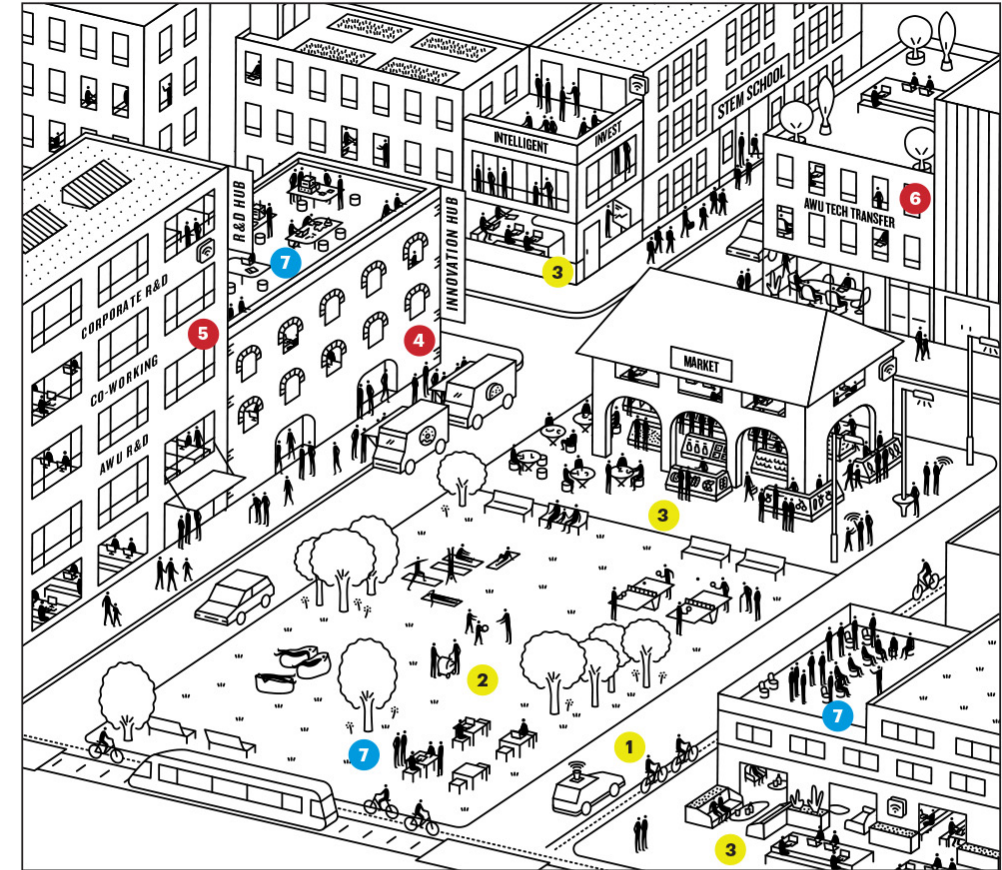
This illustration depicts the concentration of economic, physical, and networking assets within one node of an innovation district—the size of a full city block. While a district commonly ranges in size between 300 acres and 1,000 acres, creating a critical mass at specific nodes or a key corridor, which then extends over time and space, is proving to be a smart and successful strategy.

Physical Assets

1 A walkable street grid provides the backbone of the innovation district—strengthening connections between people and firms.

2 Public spaces are designed and managed to spur interaction, learning and networking.

3 Ground floors of buildings are activated with coffee shops, cafes, and gathering places—wired, comfortable, and inviting.

Economic Assets

4 A mix of institutional, company, and start-up spaces are concentrated in close proximity—including affordable workspaces.

5 Major research facilities of large companies are also located near firms and institutions to help "crack the code" on new innovation.

6 Tech transfer offices, to support commercialization, are located where people and firms are innovating—not tucked away on a university campus.

Networking Assets

7 Programming—to incubate new enterprises, accelerate learning, and strengthen networks between people and firms—permeates across private innovation spaces and public spaces.

Image courtesy of Advancing a new wave of urban competitiveness: The role of mayors in the rise of innovation districts (June 2017)

Community Focused Investment

- Investments supportive of Student, Staff, Faculty and Community becomes economically beneficial to the area, and creates a gesture of Sewanee's collaborative extension outward in a way that is mutually beneficial :
  - Book Store gets an expanded offering (Juice Bar, etc.)
  - Civic Engagement Office
  - Hub for Business, Entrepreneurship and Real Estate

- This scale commercial real estate venture, as well as entrepreneurial endeavor with the first building purchase and operation to come, could be an innovative curriculum extension.

- Creates an opportunity for students to provide "man hours" to a newly formed entity associated with the University, as well as gain invaluable real-life experience for upper-level students.

UTC Hosts National Machine Learning Conference in the Innovation District (2018)
Image courtesy of Chattanooga Innovation District

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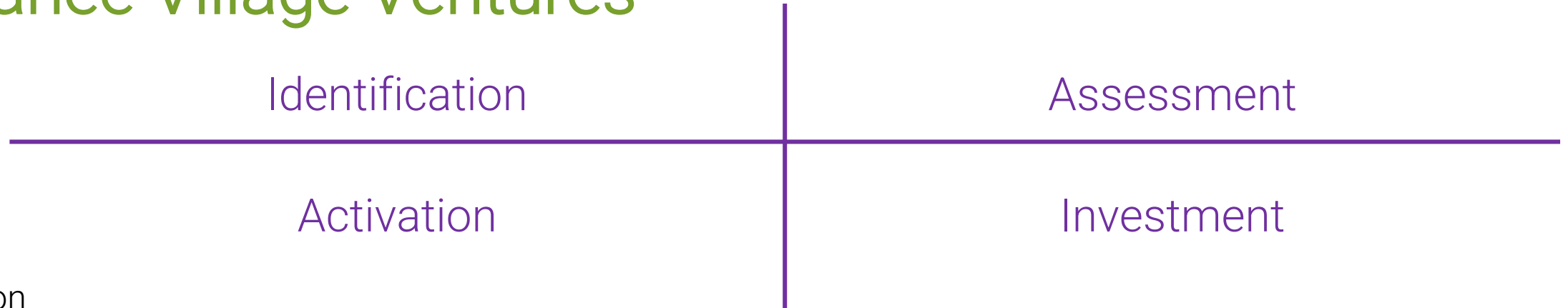Advisory Services Program

Responsibility of "The Village"

Because of the location, history and current state of things, The Village bears the responsibility of being the proving grounds for multiple efforts of Sewanee.

- Exemplary stewardship

- Creating a sense of welcoming and belonging

- Sustainable and responsible growth *(Conservationist Development)*

- Innovation and excellence in service to students and stakeholders

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Sewanee Village Ventures

Identification	Assessment
Activation	Investment

Identification
Identify particular parcels and/or buildings to strategically implement development, but not alienate or displace small and long-term business owners.

Activation
Continually improve, maintain and activate the Public Realm and curate the tenants and activities in the area.

Assessment
Evaluate the success factors, pace of growth and the areas for improvement (or greater capacity).
Prioritize and apply a logic of alignment with desired outcomes.

Investment
Considerately and decisively place funds into programs and projects that maximize the experience and multiple types of returns desired from implementation.

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Community Engagement

STAKEHOLDERS
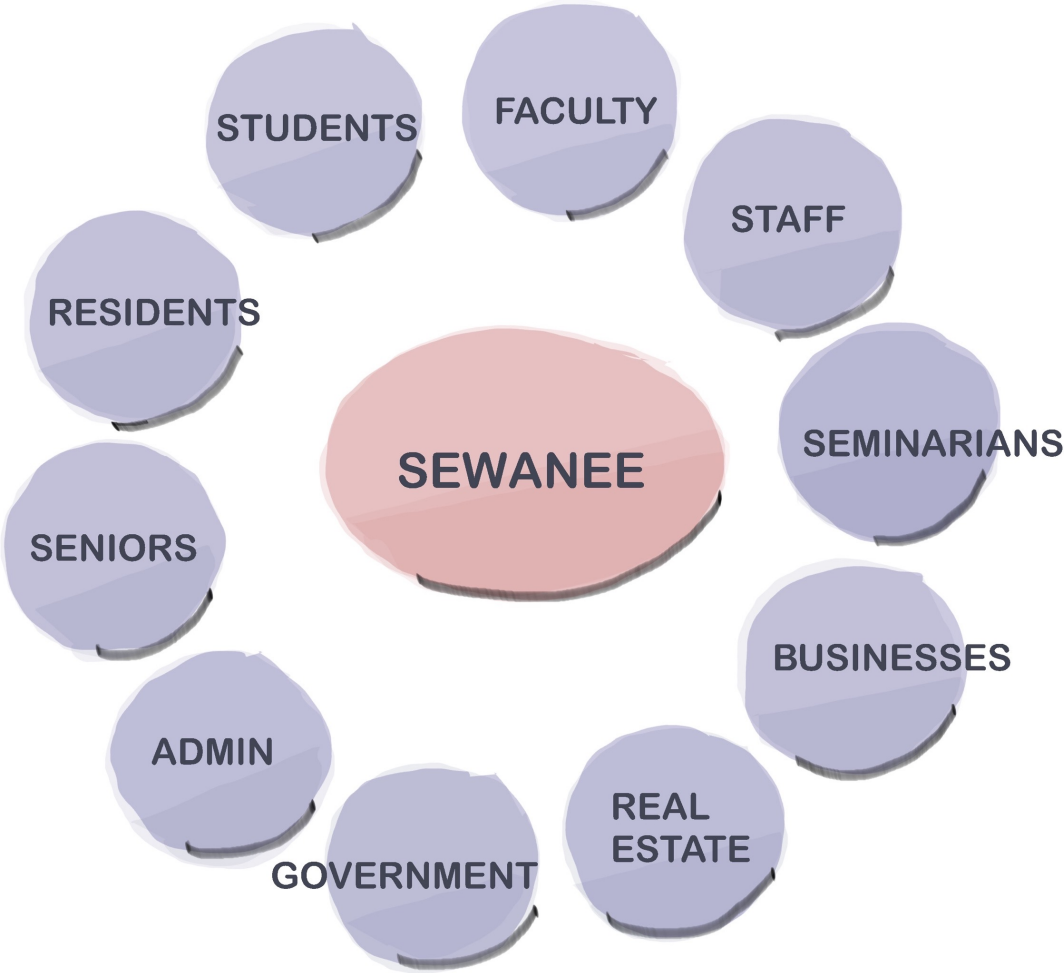
Template for Engagement

OFFICE OF STAKEHOLDER ENGAGEMENT

INTERNAL STAKEHOLDERS

EXTERNAL STAKEHOLDERS

LEADERSHIP COUNCIL

COMMUNITY WEBSITE

COMMUNITY BENEFITS AGREEMENT

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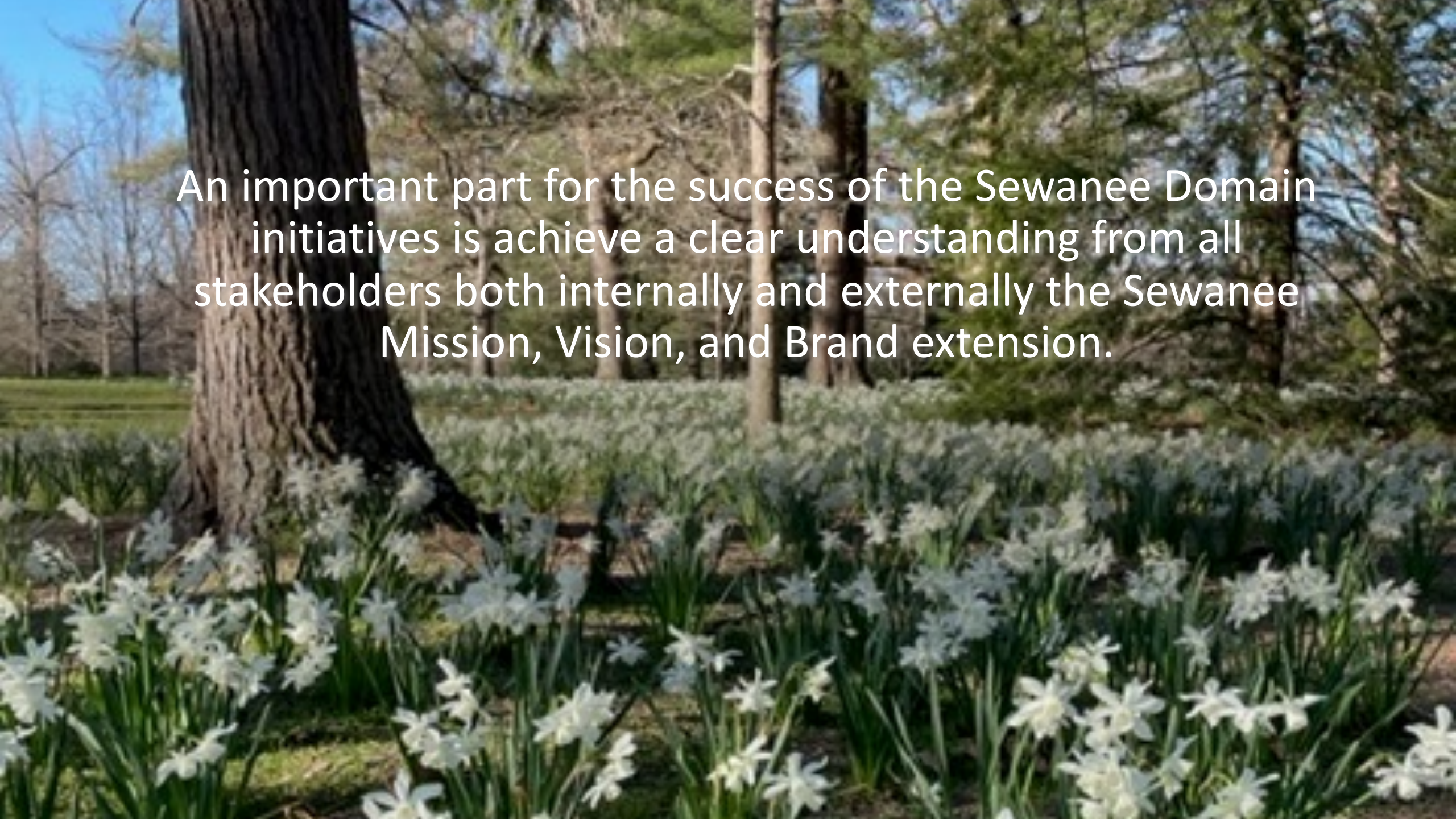
Recommendations

- Strengthen and enhance the existing Community Council. Reconstitute the mission and goals for the purpose of distributing university plans to inform and educate the community.

- Maintain and strengthen the Office of Civic Engagement so it can continue to lead the effort to provide clear and continuous information and build relationships with the surrounding community.

- Re-engage the Leadership Council to inform and collaborate on local community issues and needs.

- Invite community stakeholders to university events to help sustain and build relationships in a post Covid environment.

- Develop a website dedicated to the University's collaborations with its neighbors.
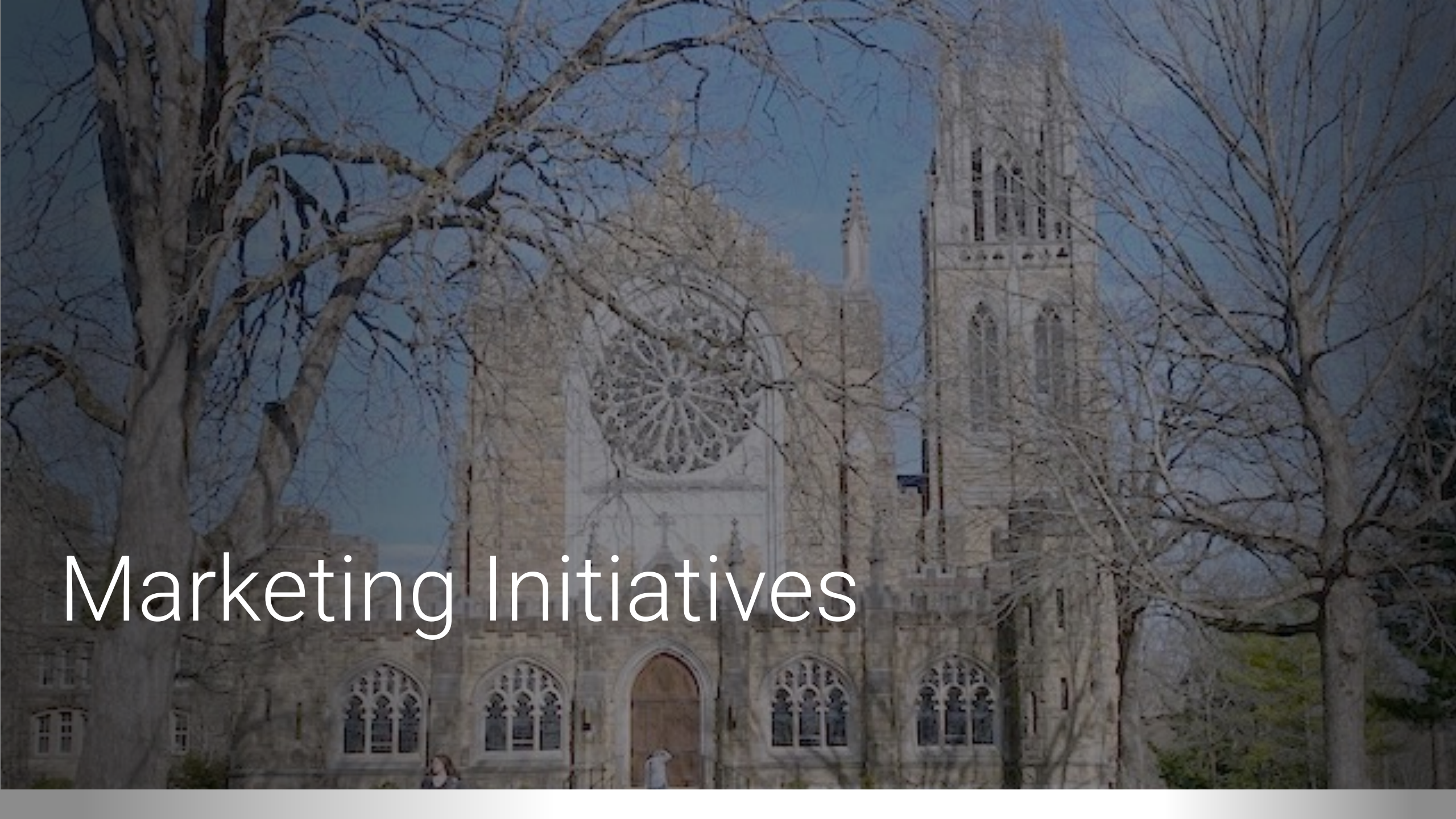
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Marketing Initiatives

An important part for the success of the Sewanee Domain initiatives is achieve a clear understanding from all stakeholders both internally and externally the Sewanee Mission, Vision, and Brand extension.

Naming

Clarify the identity and naming convention for each area of The Domain. For example, the name of the Village and new expansion area across 41A.

Vision and Brand Guidelines

Develop a Vison and Brand Guidelines Reference. This is a living online library that is available to all stakeholders. This library should include:

- The Sewanee Story
- Sewanee Mission
- Sewanee Vison
- Sewanee Brand Pillars
- Logo - standards for use
- Fonts and colors-standards for use
- Graphic standards
- Signage and banner standards
- Current talking points
- Standard PR copy
- Current Q&A- internal
- Photo library of approved images
- Standard disclaimers

Website

- Revamp the existing website
- Simplify the overall navigation and site structure
- Develop individual sections that speak directly to parents, engage students with short testimonial highlighting campus life
- Inform the community on current events at Sewanee that includes a FAQ available to the public

Reputation Management

- Develop a reputation management program

- Include responding to all comments both positive and negative

- Elevate significant issues internally and find ways to take certain issues off-line to resolve

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Messaging

- Hire an external PR consultant to help with overall messaging and develop talking points

- This consultant should also assist with the placement of press releases to a regional and national audience

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Government and Community Outreach

- As Sewanee undertakes its development projects going forward it will be critical to the endeavor to hire or consult with a marketing and communication specialist
- This person is responsible to lead messaging, interface with governmental agencies, and outreach to the community
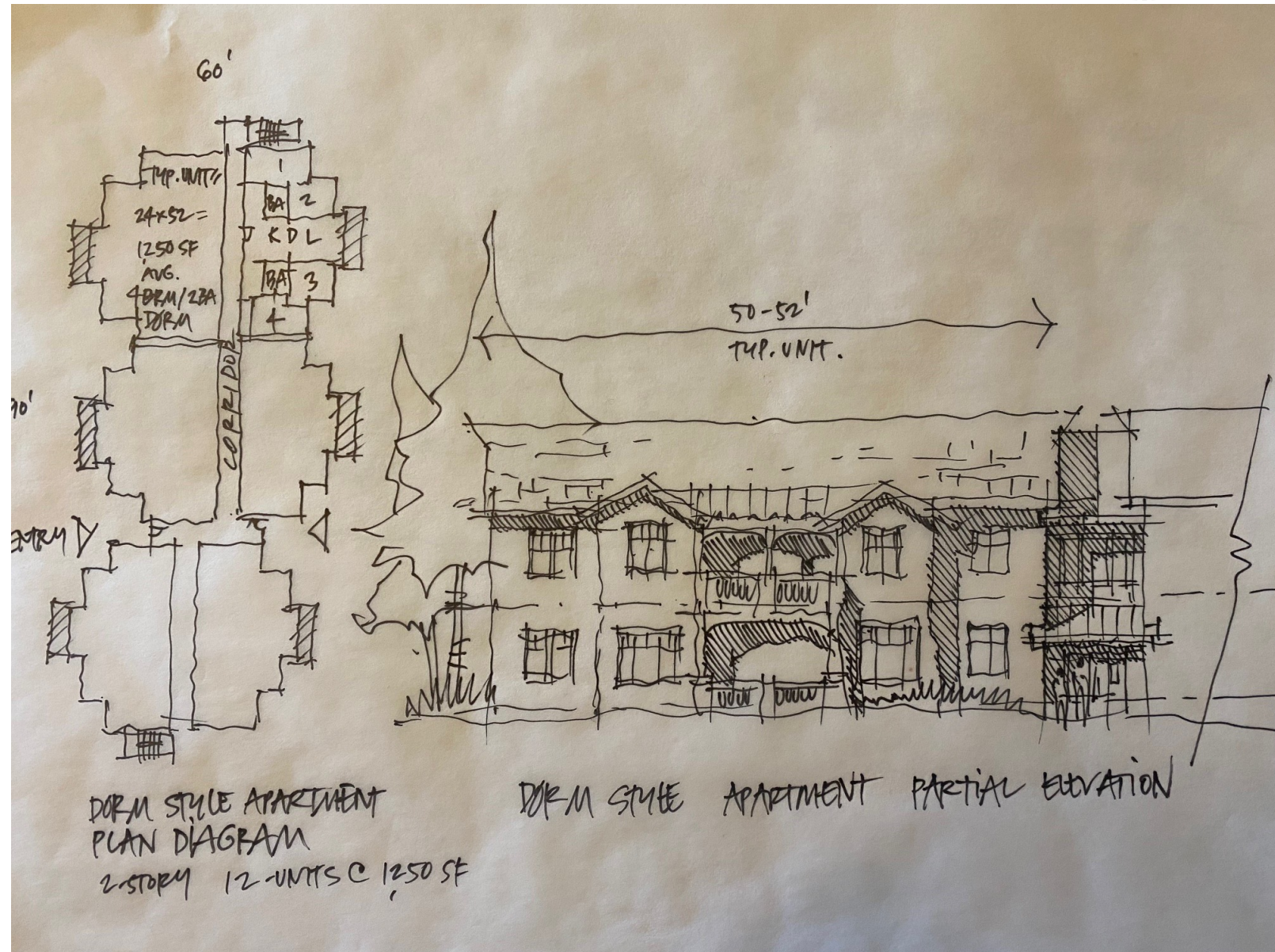

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Housing Segments and Typologies

POPULATION   HOUSING SEGMENTS (Rental and For Sale)

	Dorms	Apartment Flats	Town Homes	Courts	Bungalows	Single Family Homes
Home Size (sf)	300/room	800	1,250	1,450	1,700	2,000
Students						
Under classes	X					
Upper classes	X	XXX				
Seminarians						
Younger 20s (singles/couples)		XX	XX			
Families with Children			XX	XXX	XXX	
Faculty (FT)						
Younger Tenure Track		X	XX	XXX		
Established Tenured			X	X	XXX	XXX
Staff/Admin						
Line		XX	XX	XXX	X	
Senior Admin		X	X	XX	XXX	XXX

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DORMS

4 BRM/2BA
1,200 SQ FT

DORM STYLE APARTMENT PLAN DIAGRAM
2-STORY 12-UNITS @ 1250 SF

DORM STYLE APARTMENT PARTIAL ELEVATION

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APARTMENT FLATS
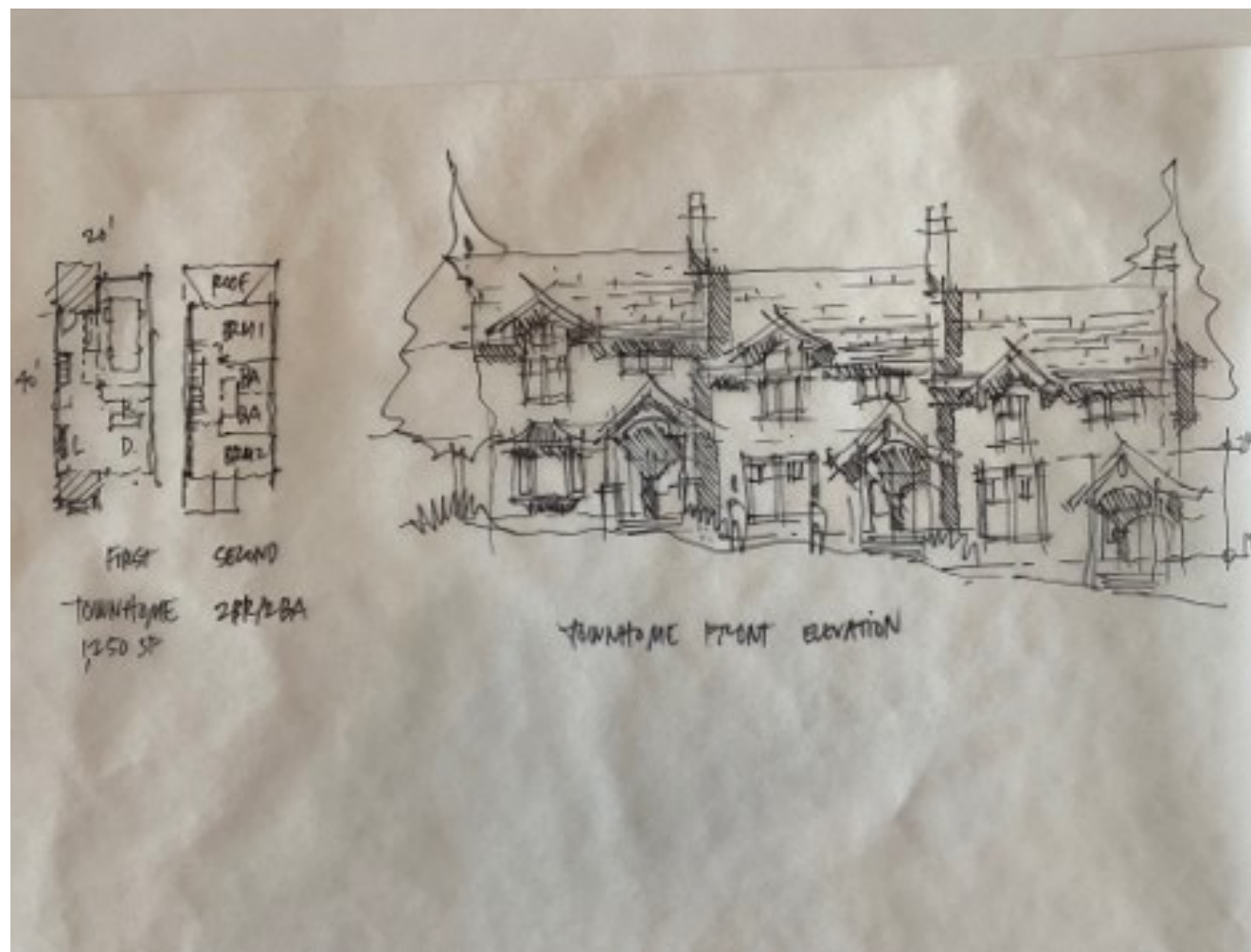
8-PLEX 2-story with 8 Units:
1BRM/1BA, 650 SQ FT
2BRM/2BA, 850 SQ FT
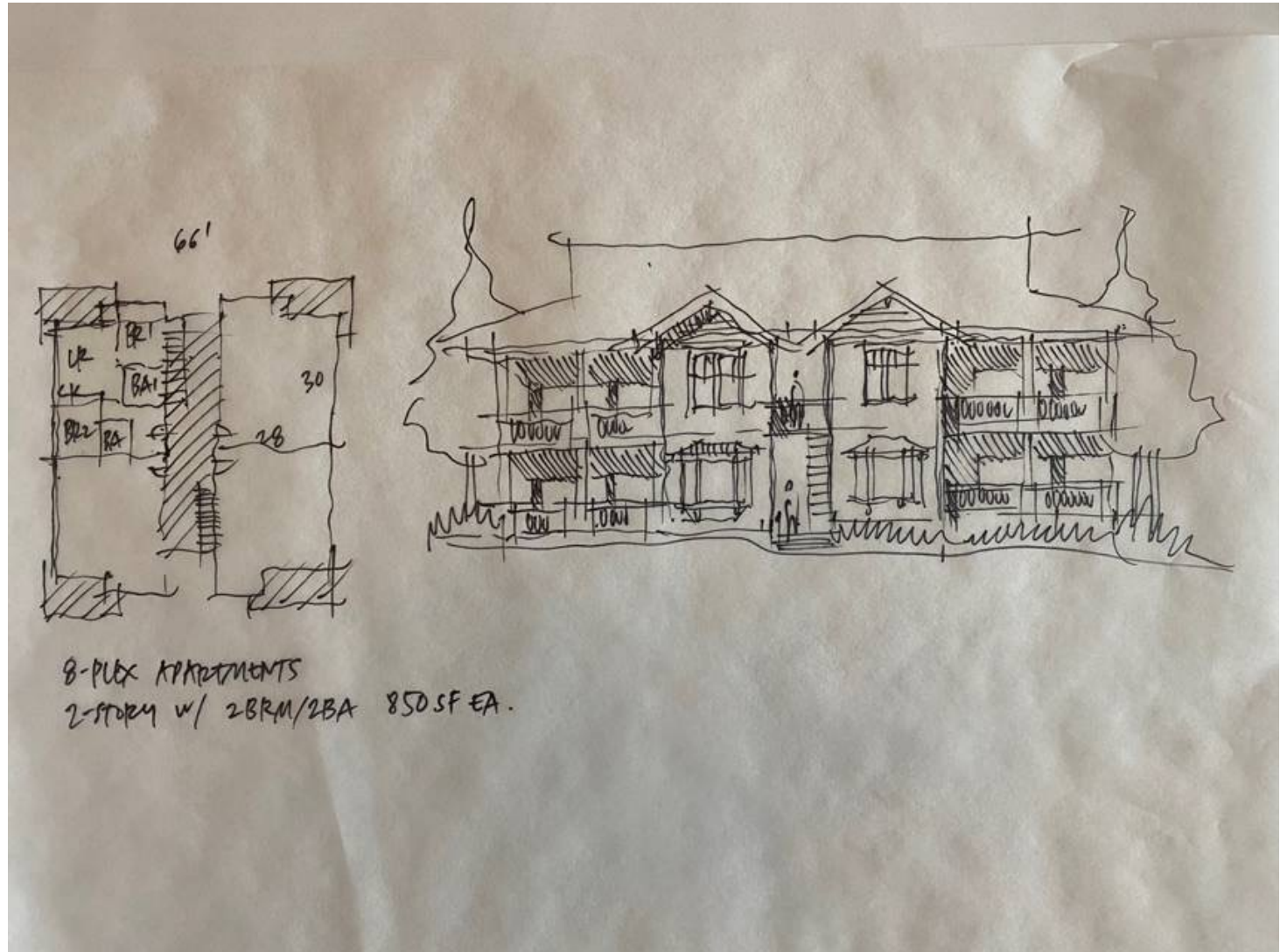
TOWNHOMES

1,250 SQ FT, 2-story 2BRM/2BA (small)
1,600 SQ FT, 2-story 3BRM/3BA (medium)
EA Unit Footprint 20'x40'

COURTS

1,450 SQ FT, 2BRM/2BA (small)
Footprints approx. 30'x30' plus Porches
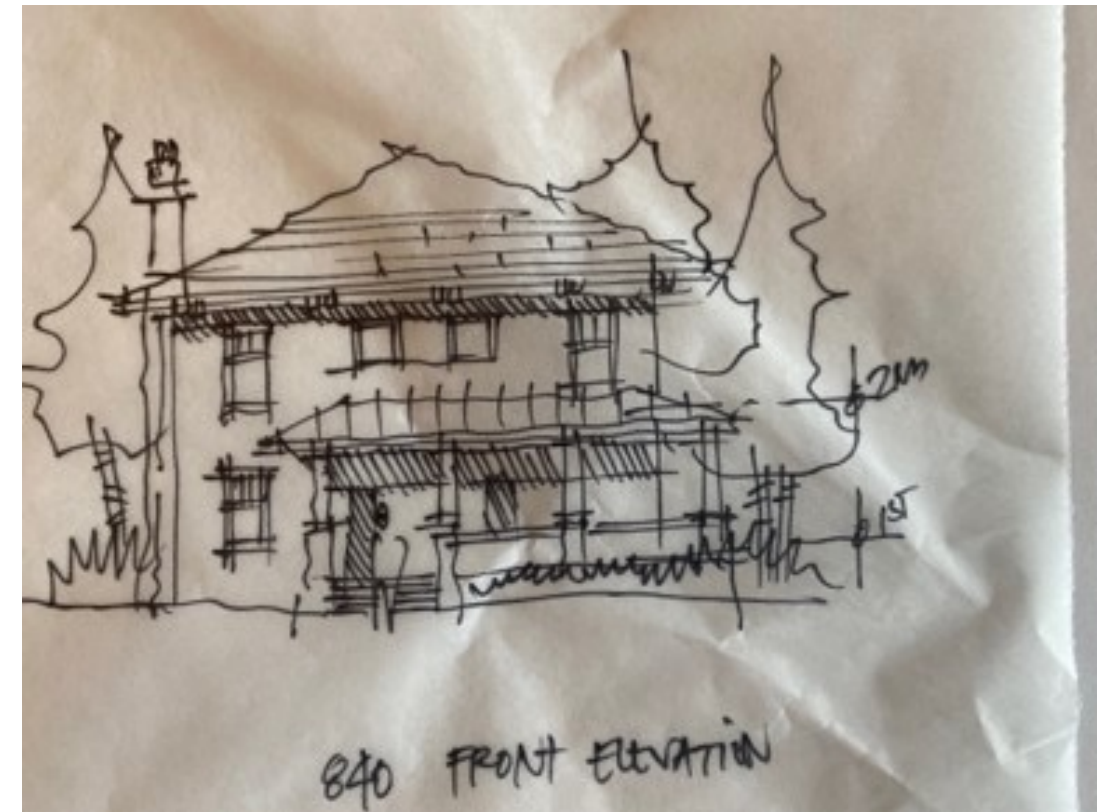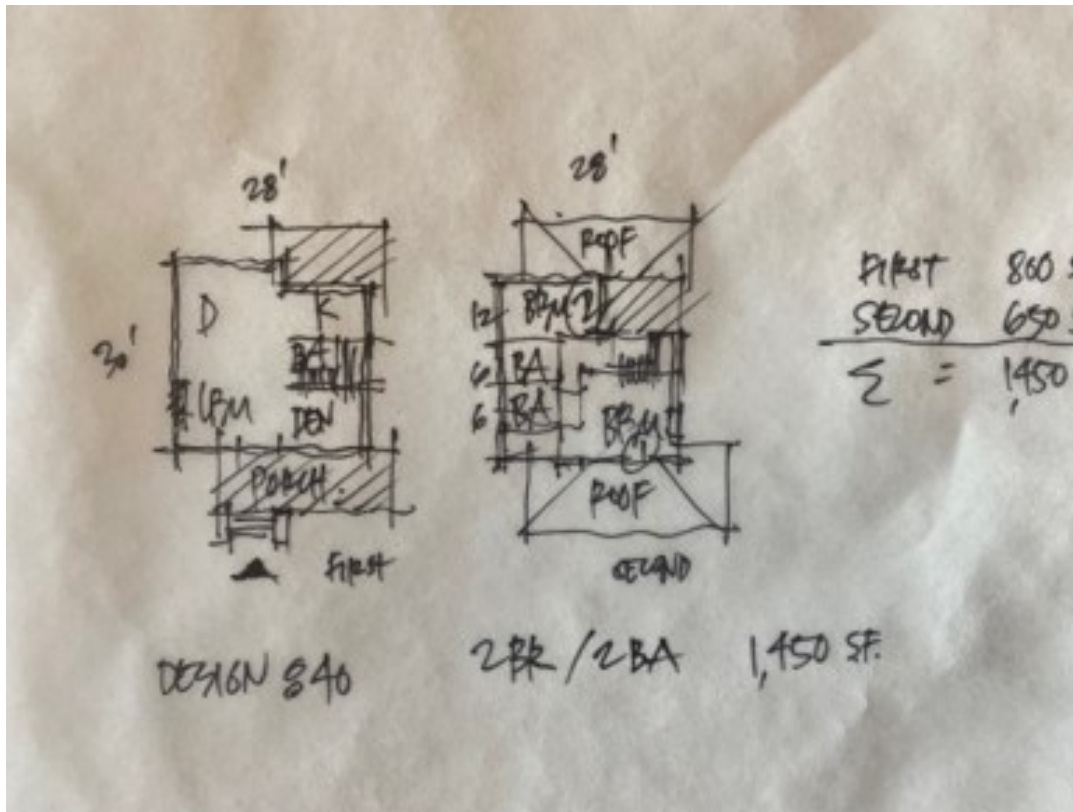
BUNGALOWS

1,700 SQ FT, 3BRM/2.5BA (medium)
Footprints approx. 30'x30' plus Porches

842 FRONT ELEVATION
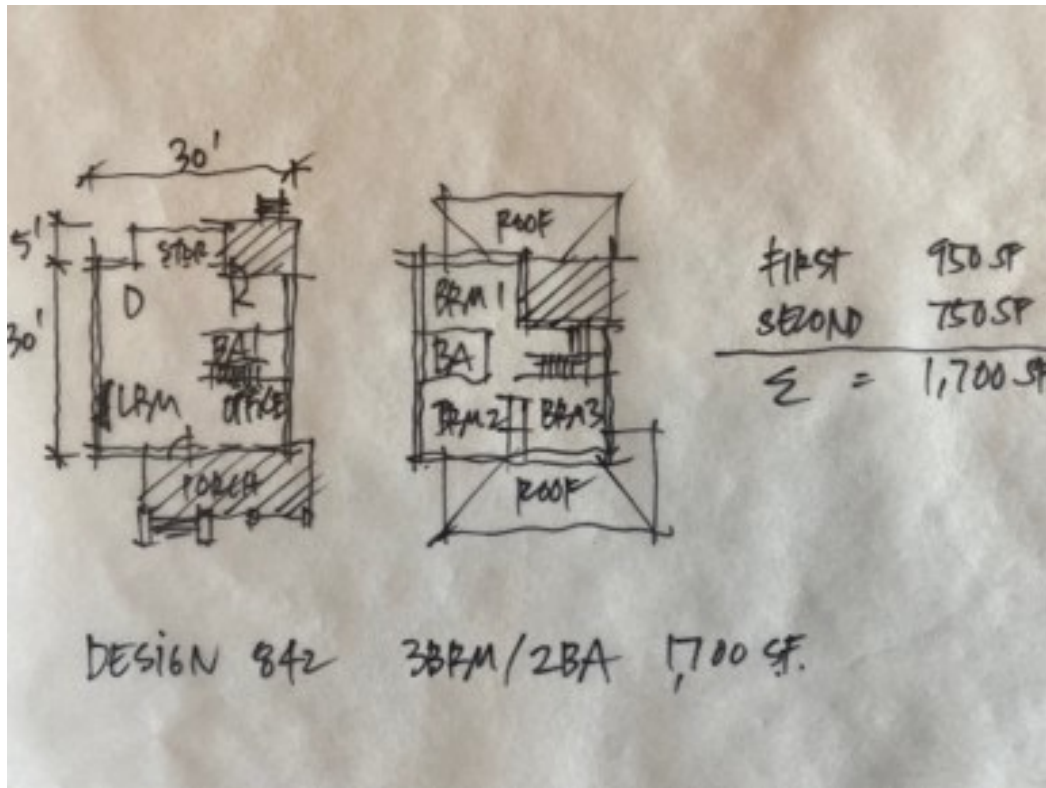
SINGLE FAMILY
1,700 SQ FT, 3BRM/2.5BA (medium)
Footprints approx. 30'x30' plus Porches
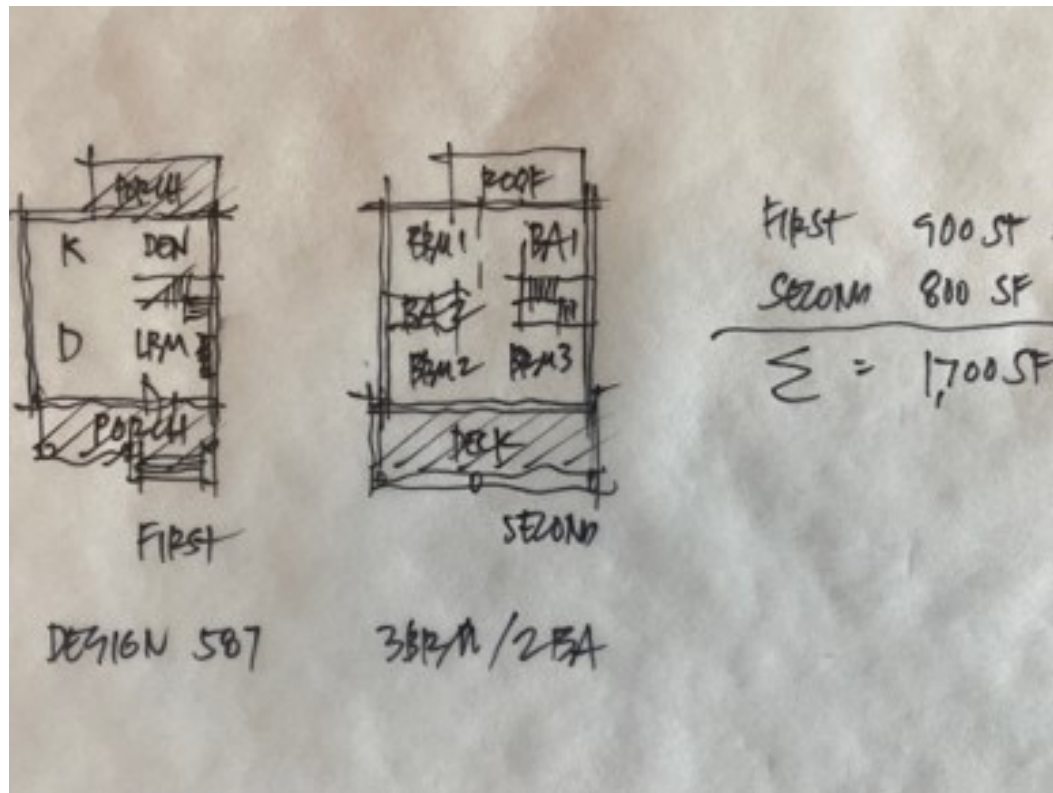
Village and The (Broader) Domain

Promote and Preserve The Domain

Conduct landscape-based planning that prioritizes the preservation of the natural environment

- Ecology
- Habitat
- Scenic qualities
- Connectivity
- Quality
- Access
- Habitation

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Continue to Elevate and Promote Bike and Pedestrian Connectivity

Add to the network of trails, bike lanes, and sidewalks

- New trail connections
- Bike lanes and sharrows
- Signage and wayfinding

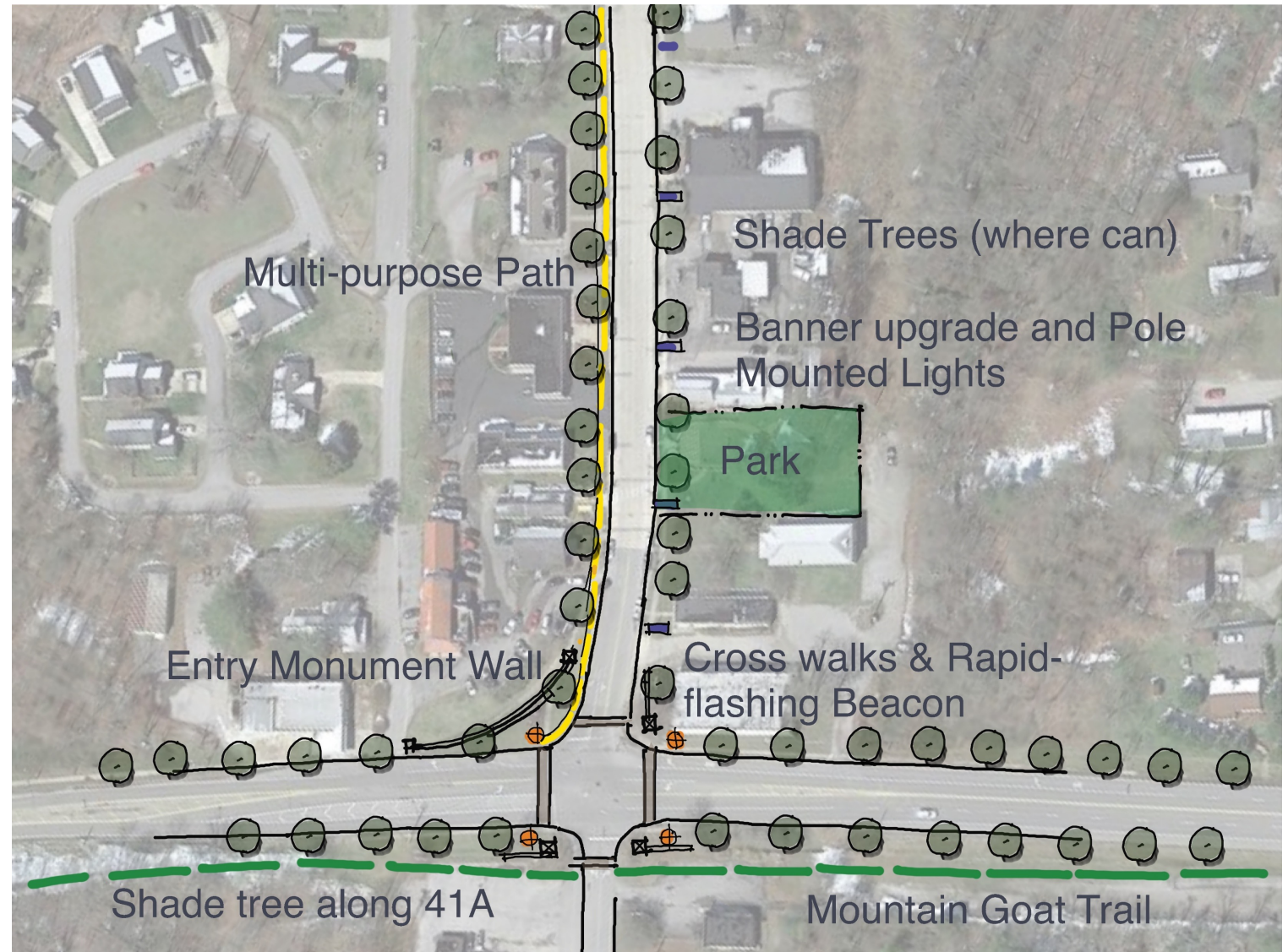Urban Land Institute
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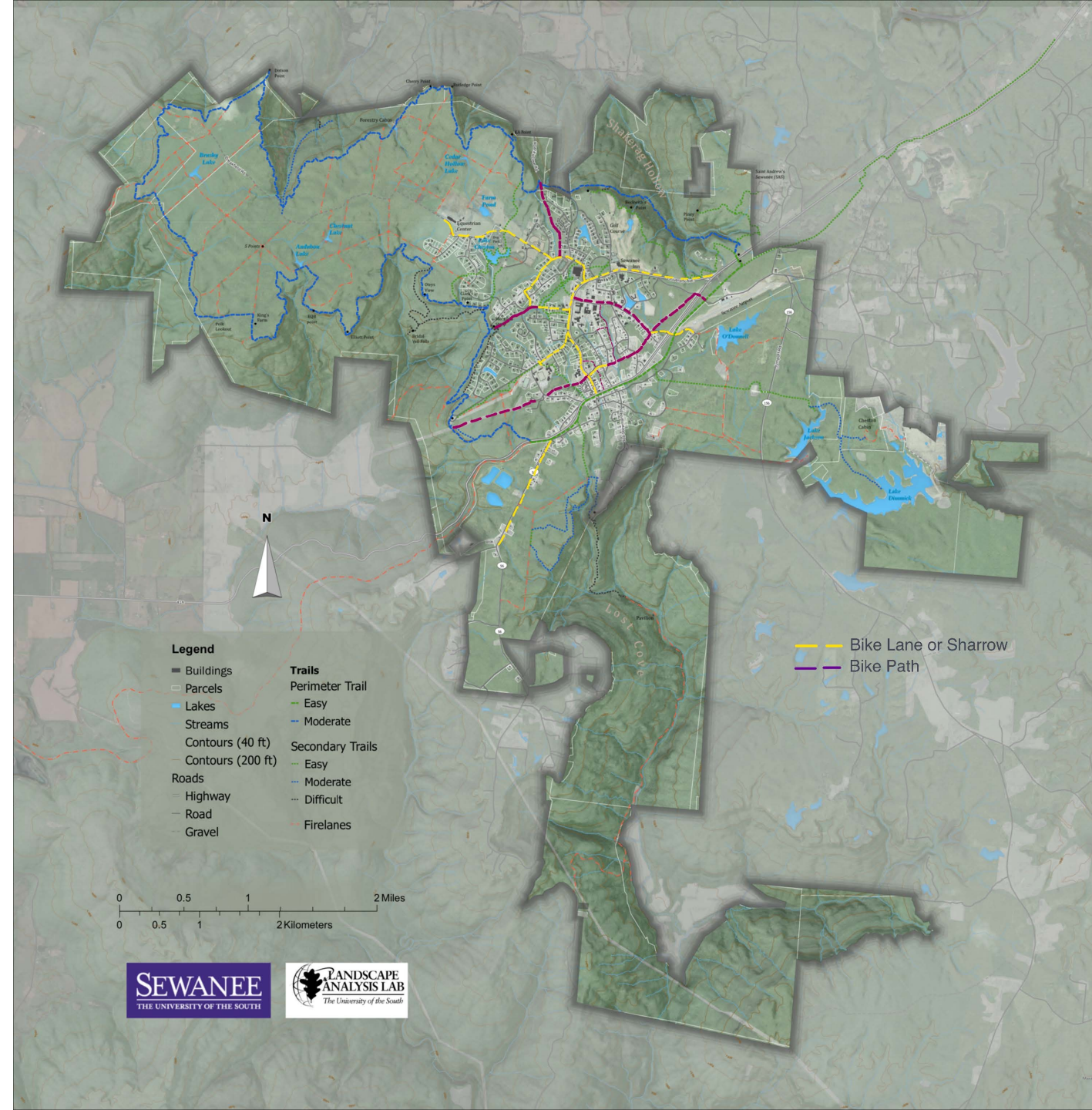
Improve Placemaking Quality of University Drive

Create more aesthetic continuity, safety, comfort, and fun

- Multipurpose trail
- Shade trees
- Signage and wayfinding
- Banners
- Pole mounted streetlights
- Monumentation
- Crosswalks

Multi-purpose Path

Shade Trees (where can)

Banner upgrade and Pole Mounted Lights

Park

Entry Monument Wall

Cross walks & Rapid-flashing Beacon

Shade tree along 41A

Mountain Goat Trail

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Focus on the Depot Area

Enhance the area as a great neighborhood that brings people together

- Respond to environmental conditions
- Use existing infrastructure
- Maximize connections / identity with Mountain Goat Trail
- Support existing gathering areas

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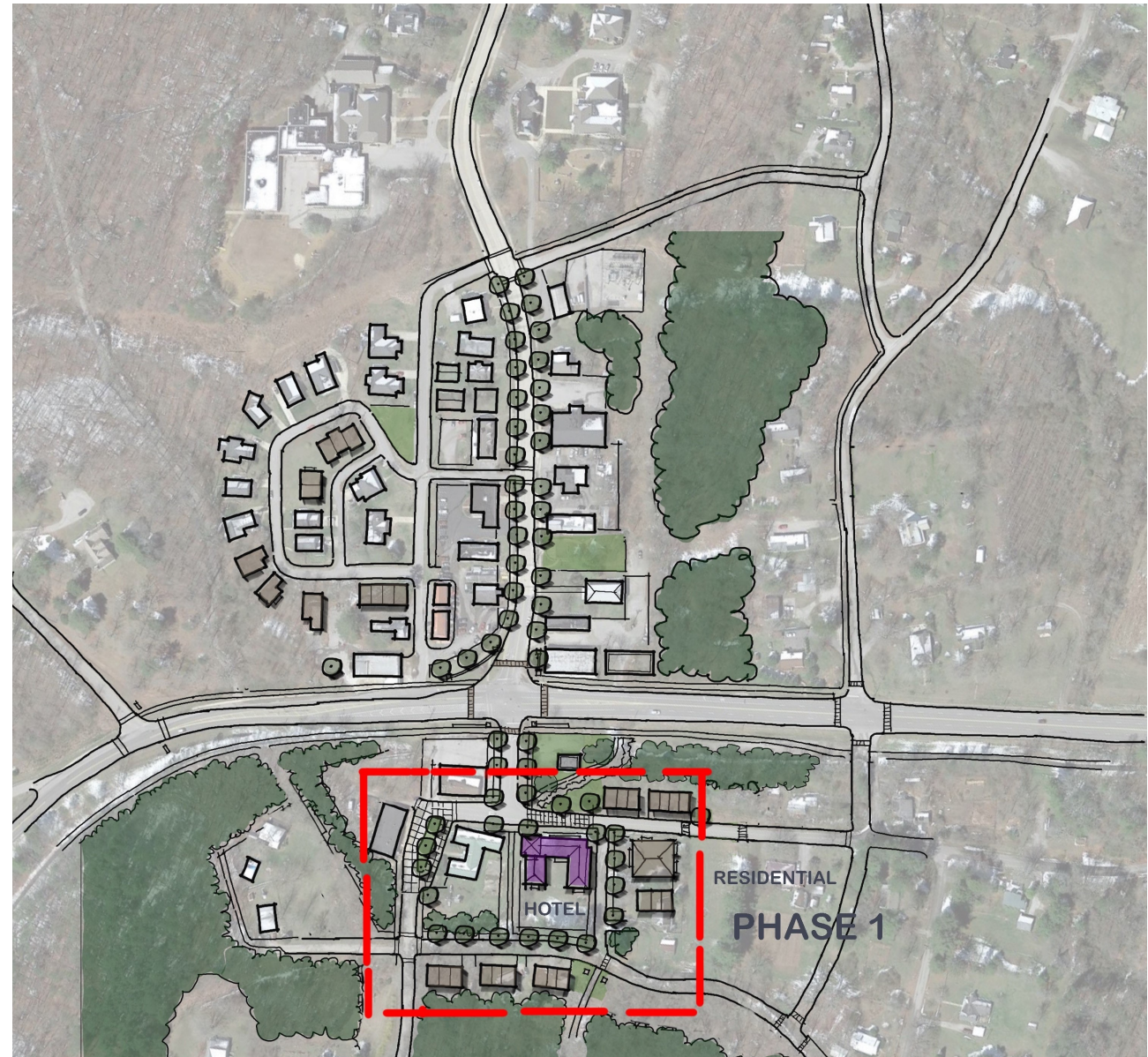Advisory Services Program

Focus on the Depot Area

Enhance the area as a great neighborhood that brings people together

- Locate phase 1 housing of 25 units
- Locate 50-80 room lodge
- Locate 25-30 homes
- Right size retail to fit market

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Focus on the Depot Area

Enhance the area as a great neighborhood that brings people together

- Create a trailhead park at Mountain Goat Trail and project entry
- Locate historic / interpretive elements in existing building
- Create parks and trails connections to support social interaction
- Use clustering to support intergenerational learning

FARMERS MARKET & ENTERTAINMENT

TRAILHEAD PARK & INTERPRETIVE CENTER

NEIGHBORHOOD

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Other Domain Opportunities

Camping

Outdoor Event Pavilion
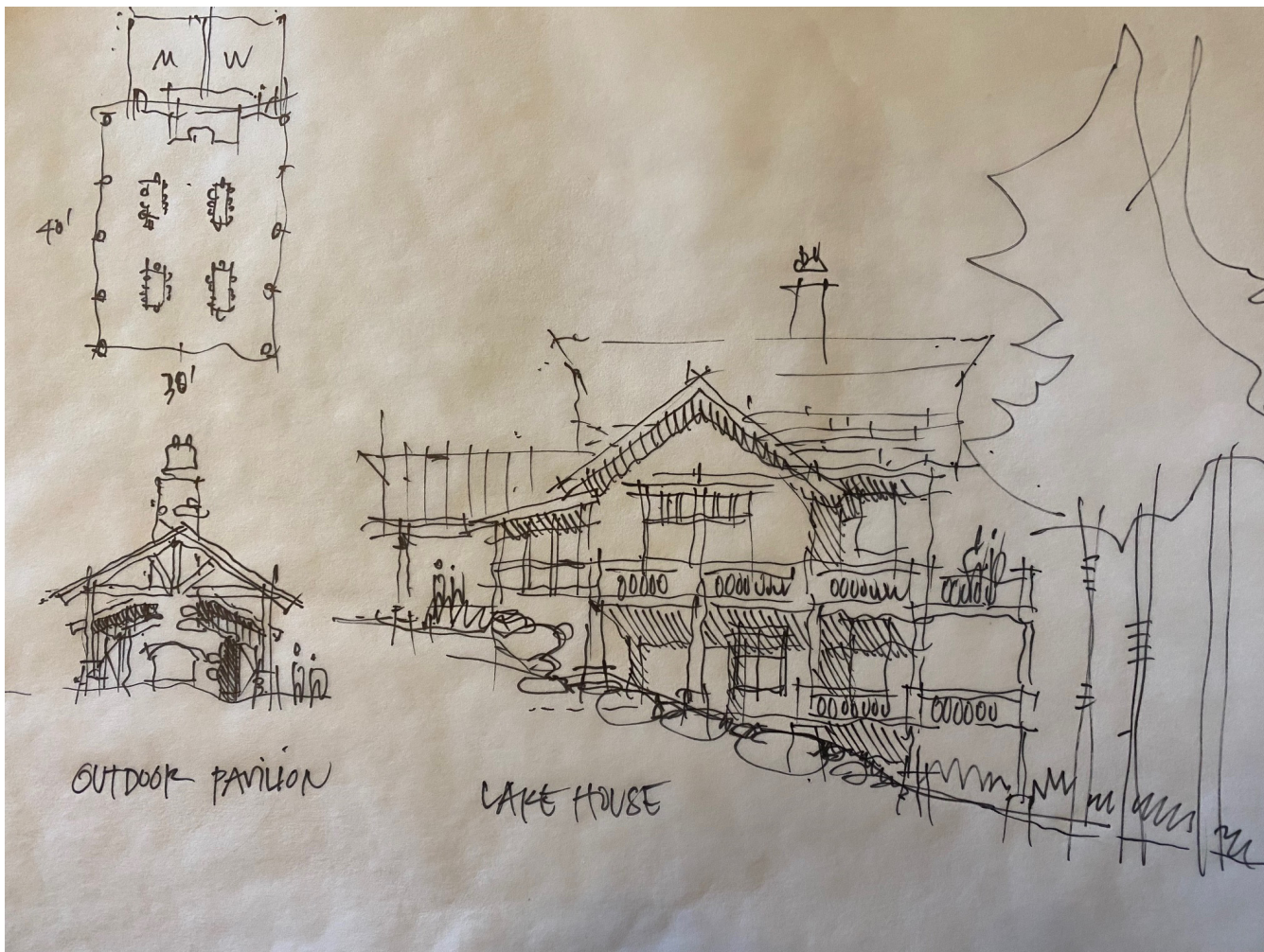
Sports Activities
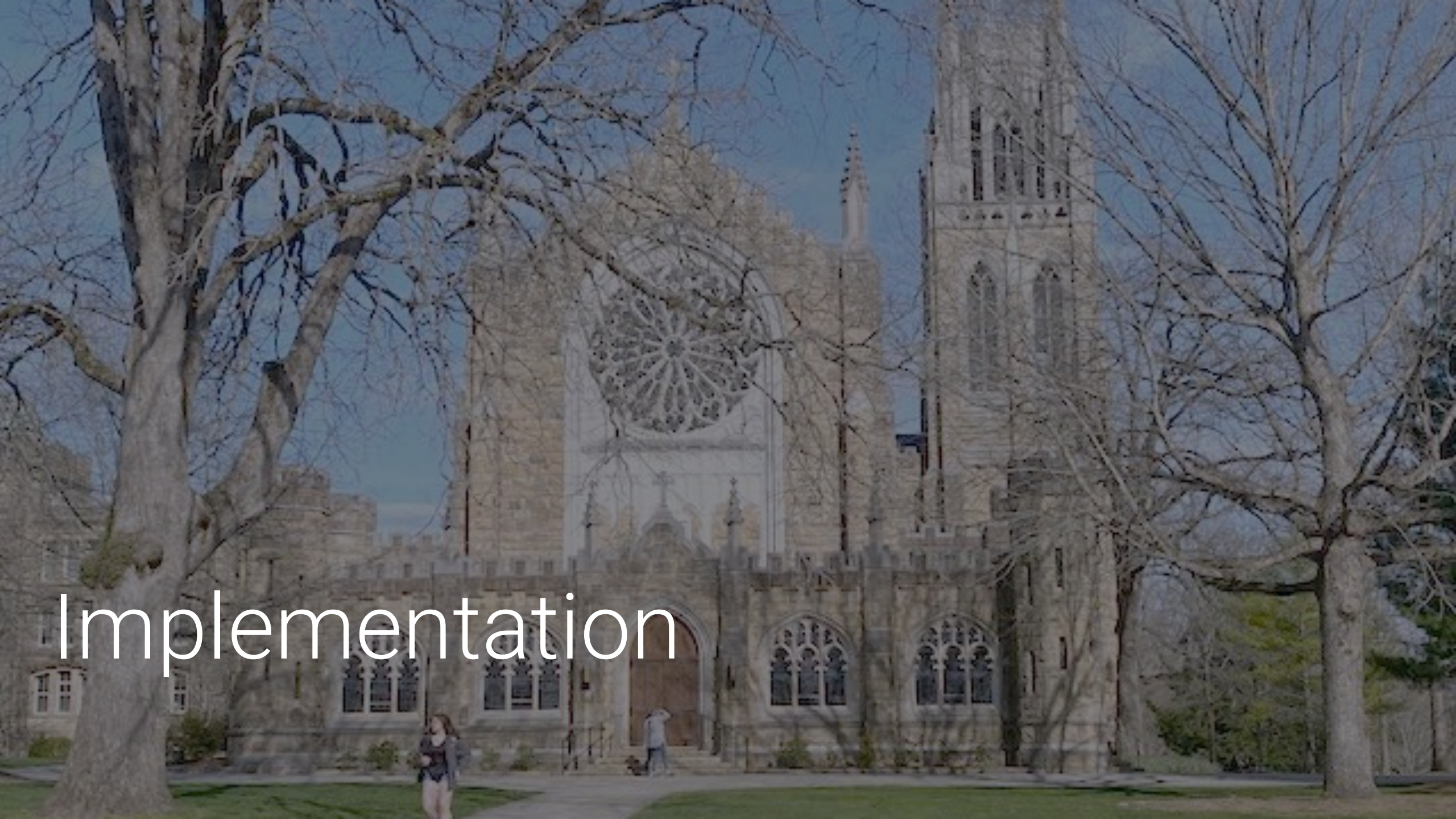
Implementation

Implementation Timeline to 2026

	"Monday"	2022	2023	2024	2025	2026	+

Gating Items

- SVV Business Plan — 60 days to June 1
- Leasehold Revisons — 90 days to July 1
- Buyer Assistance Program — 90 days to July 1

Broader Domain

- Community/Civic Engagement — Ongoing
- Inn Expansion — Site and Design, Build, Open
- Lot/Home Sales — Pricing, Prep/service lots, Builder plans & Spec/Sales
- Excess Land Dispositions — Comfirm areas, Transact

Village

- Housing - Phase 1 — Site Prep/Design Dev, Infrastructure, Build, Lease
- Lodging — Feasibility, Business Plan/RFP, Build, Open
- Streetscape/Placemaking +
- Tenant Curation/Activiation — Business Plan, Implement

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Q&A

Thank you!