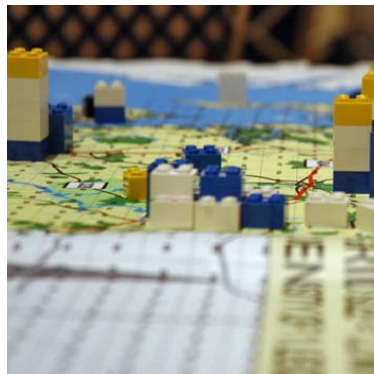


Reality Check

A GUIDE FOR ULI DISTRICT COUNCILS

January 2007



About ULI—the Urban Land Institute

ULI—the Urban Land Institute is a 501(c)(3) research and education organization supported by its members. Its mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. 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 policy makers dedicated to creating better places. Founded in 1936, the Institute now has more than 34,000 members worldwide, representing the entire spectrum of land use and real estate development disciplines working in private enterprise and public service. The members of the Institute are community builders, the people who develop and redevelop neighborhoods, business districts, and communities across the United States and around the world. ULI neither lobbies nor acts as an advocate of any single industry. It examines land use issues, impartially reports findings, and convenes forums to find solutions to complex land use problems, collaborating with industry and stakeholder groups worldwide.

At the state, regional and local levels, the Institute addresses community building and land use issues through District Council Community Outreach programs. Through these programs, ULI members collaborate with other stakeholders—on smart growth, workforce housing, regional cooperation, urban revitalization, educating high school and university students on land use and development issues, and other topics—to implement consensus-based solutions for more livable communities. Community Outreach efforts enable local ULI leaders to identify challenges to sustainable development, exchange best practices, and develop new solutions to improve development patterns.

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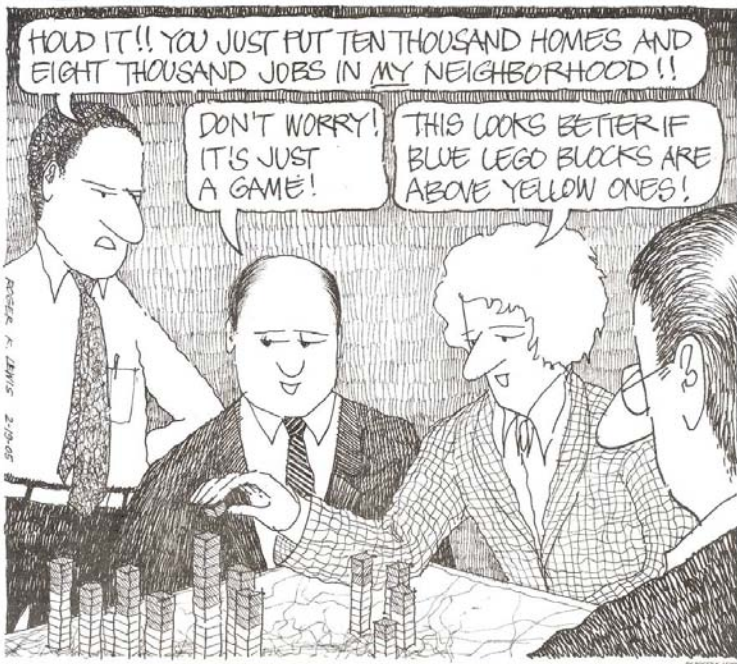
Introduction

Competition among regions in the global economy is pronounced. Indeed, it is regions, not cities or counties or states, that are now the functional unit of international economic competition. Success depends not only on the efficient production of goods and services and flows of capital but also on prevailing in the international competition for the best and the brightest people. Thus the future prosperity of a region will depend to a significant extent on its ability to compete with other leading regions in offering the best mix of economic vitality and lifestyle amenities to attract and retain its most valuable resource—its people. Those regions with a clear plan for how they are going to grow, a plan that has broad-based support from the private, nonprofit, and public sectors, will have a key competitive advantage.

Reality Check, a one-day, participatory, regional visioning exercise created by ULI Los Angeles and inspired by Envision Utah, is an important tool available to District Councils to engage leaders in a regional dialogue on growth issues. Although each visioning exercise and process is different, working

toward the overall education and awareness-raising goals of *Reality Check* has the power to create a regional dialogue that results in consensus on where and how the region will grow over the next 25 or 30 years.

This document is intended to serve as a reference for ULI District Councils and other interested parties as they plan *Reality Check* exercises or comparable exercises in their regions. *Reality Check* is intended to provide leaders with a region-specific roadmap to guide future growth. Such a roadmap should support regional economic vitality, livability, and environmental sustainability and increase consensus, cooperation, and coordination on local land use decisions. There is no one right process, so the information and examples presented here should serve as guidelines rather than as a set of ironclad instructions. This guide also provides an opportunity to learn from the best practices and mistakes of previous regional visioning exercises.



While each *Reality Check* regional visioning exercise is different, each encourages regional leaders to work together to allocate the growth coming to their region

(SOURCE: ROGER K. LEWIS, FAIA, FROM HIS COLUMN, "SHAPING THE CITY," THE WASHINGTON POST, FEBRUARY 19, 2005).

What Is *Reality Check*?

Reality Check, as ULI uses the term, is a one-day exercise that brings together diverse regional leaders to build consensus on where the growth of housing and jobs should be located across a region. *Reality Check* aims to kick off a long-range planning and implementation process designed to help leaders and residents envision alternative growth scenarios.

Several ULI District Councils have sponsored or are sponsoring *Reality Check* efforts: ULI Los Angeles in 2002, ULI Washington and ULI North Texas in 2005, ULI Baltimore in 2006. *Reality Checks* are in the planning stages for 2007 in Phoenix, Seattle, and Tampa. Although all aim to fulfill similar goals of educating, raising awareness, and building consensus for future change, each *Reality Check* has been different, reflecting the culture and growth issues unique to each region. *Reality Check* is a versatile exercise that can and should be adapted to reflect the political culture, market profile, and issues of a region, such as its rate of growth, political considerations, market, environmental challenges, demography, geography, type of infrastructure, and jobs/housing balance. There is no one right way to plan and hold a *Reality Check* and carry out a subsequent implementation effort, but there are elements that are common to all *Reality Checks* organized by ULI District Councils.

Principal Objective

Exactly what is meant by “*Reality Check*”? In general, it refers to a defining moment, a tipping point, when a region’s residents become aware that they have choices to make about growth, air quality, traffic, housing affordability, and other important issues. Neither a traditional conference nor a theoretical exercise, *Reality Check* is a planning technique rooted in analysis of real-world economic, demographic, and

geographic data and trends. The exercise allows participants to throw out their preconceived notions about how land is zoned today and forget what type of growth they believe is coming tomorrow. The exercise is their chance to act as master planners for how they would like the region to look in the future. For this reason, participants should play the game aspirationally rather than reactively following trends.



Stakeholders discuss their growth strategy during the Washington, DC, *Reality Check* exercise.

Participants representing diverse constituencies and viewpoints meet and work together, typically during a morning-long exercise, to allocate the projected growth in a region’s population and jobs through a designated year. Working in tables of eight to ten people, the stakeholders develop a set of principles for where and how the region should grow. Through discourse and negotiation, they then place Lego® blocks or paper chips representing the projected housing and employment growth on a grid-covered map of the region. In addition to educating participants about regional cooperation and raising awareness of current and future levels of growth, the exercise strives to generate useful outcomes that will be reflected in future policies and practices.

The exercise addresses issues concerning the social, environmental, and economic costs to the region as they relate to its current pattern of development. *Reality Check* attempts to raise awareness and affect policy decisions associated with issues faced by many regions across the country:

- Traffic congestion;
- Air pollution with the potential to threaten public health;
- Housing demand as it relates to supply, including the jobs/housing balance in fast-growing regions and the deflection of growth from established communities outward to exurban areas, rural enclaves, and beyond;
- Increasing costs to taxpayers to provide new infrastructure;
- Water quality deterioration;
- Tax and other economic ramifications for a region;
- Rapid loss of farmland, forests, wetlands, wildlife habitats, and scenic vistas throughout the region and, with that loss, a loss of rural character and resource-based industries.

The overall goal of the *Reality Check* initiative is to help a region come together to rethink where and how it will grow in a way that adds value to its economy and its communities while preserving the environment and quality of life. By working through the exercise, regional leaders become aware of the realities associated with the growth coming to the region. The *Reality Check* exercise is designed to accomplish a series of goals. To achieve them, a successful visioning exercise requires a substantial planning effort and a well-thought-out invitation list.

ULI and *Reality Check*

ULI, which has long been engaged in identifying and promoting best practices in land use and development, is singularly positioned to bring together leaders from the political, business, environmental, real estate, and civic realms, all of whom have a stake in a region's future viability. One of ULI's greatest strengths is its ability to tap into the expertise and experience of its diversity of members. ULI has identified regional cooperation and coordinated regional planning as a priority. Similarly, ULI has committed significant attention and resources to developing concepts for smart growth and refining and promoting practices that will accommodate growth without sacrificing the livability of neighborhoods or violating environmental stewardship responsibilities.

***Reality Check* is most effective when organized around a goal or set of goals, which might include the following:**

- Promote a regionwide awareness of the level of growth that is coming.
 - Allocate projected housing and employment growth between and among jurisdictions.
 - Recognize the legitimate points of view of different stakeholders.
 - Lay the foundation for the development of a concrete list of next steps to ensure quality growth to meet the region's needs over the next two decades.
-

Reality Check is intended to provoke a regional discussion about where the region should grow and can be followed by additional workshops or subsequent programming focusing on how the region should grow. To enact change effectively, organizers should make implementation planning an integral part of the program from the beginning. *Reality Check* lays the groundwork for a future in-depth visioning process, for regional dialogue, and ultimately for a sustainable implementation strategy. It is a catalyst, designed to help launch a broader and more intensive visioning process that includes analysis of robust alternative scenarios for growth. *Reality Check* also strives to produce immediate outcomes that can be used to guide implementation of government policies and development practices that support the *Reality Check* vision.

“Reality Check brought together many of southern California’s warring constituencies and led to a broader and more inclusive vision for the growth of the Los Angeles region.”

**Stuart R. Mork, Chair of
Reality Check on Growth—Los Angeles**

The key premise underlying *Reality Check* is that growth represents a real opportunity for regional leaders, who are challenged to harness that growth to make their region an even better place to live, work, and play. *Reality Check* gives a ULI District Council a platform from which to educate and inform governments, the private sector, and citizens about ways that they can support economic vitality,

community livability, and environmental sustainability. Although the exercise can be expensive and staff and leadership intensive, *Reality Check* is a gratifying and effective way to engage District Council members, elevate the visibility of ULI, and create new opportunities for regional public, private, and civic leadership.

Reality Check on Growth—Los Angeles

In 2001, ULI Los Angeles felt compelled to tackle the region's growth issues, in part because of a "Strategies for Solutions Summit" held by the District Council and the University of Southern California (USC) Lusk Center for Real Estate in 2001, which focused on the growth challenge facing southern California. A key recommendation from the summit was the need to engage the public in a visioning process for the region. The Southern California Association of Governments (SCAG) also had recently announced its multiyear, multimillion-dollar work program "Growth Visioning for Sustaining a Livable Region." All these organizations saw the value in engaging the private sector, as well as the region's public and community leaders, in a visioning program. Organizers envisioned that

Reality Check would build the needed excitement for and commitment to SCAG's multiyear program. Indeed, *Reality Check* was the first growth visioning exercise in southern California at the regional scale.

After ten months of planning, ULI Los Angeles, the USC Lusk Center for Real Estate, and their partners—the Southern California Transportation and Land Use Coalition, and SCAG—convened nearly 300 regional political, business, development, community, and environmental leaders on October 10, 2002. Participants were charged with adding 6 million more residents, which would require 2 million homes and 2.2 million jobs, to the five-county region (Los Angeles, Orange, Ventura, Riverside, and San Bernardino counties). They were given paper chips representing housing and job growth at current average development densities to place on a map of the southern California region. Each paper chip represented the footprint of land uses at specific densities and was placed on the map on 40 one-square-inch grids, each representing four square miles. All chips had to be placed on the map and could be assigned only to undeveloped land.

Pretty quickly, participants realized that growth could not be accommodated at current densities—it simply would not fit on the map. Participants were then allowed to trade in their conventional-density chips for higher-density and mixed-use chips. Four low-density chips, for example, could be traded for one medium-density chip. This chip could then be placed on any grid cell on the map. Bankers kept detailed records of all trades. In addition to its strong message about the need for greater density, the Los Angeles *Reality Check* also focused on infra-



Leaders consider where to place paper chips in the Los Angeles *Reality Check* exercise.

structure development, especially transit. Participants were allowed to draw new transit and roadway improvements with markers on the map. Some participants went so far as to propose stacked transportation modes above existing freeways.

<http://www.uli-la.org/realitycheck/>

Reality Check Washington

ULI Washington and the Washington Smart Growth Alliance cosponsored the *Reality Check* on Growth–Washington exercise with Fannie Mae and the Fannie Mae Foundation. Nearly 300 leaders from the political, business, environmental, real estate, and civic realms, representing 21 jurisdictions, gathered at the Ronald Reagan Building in Washington, D.C., on February 2, 2005. Attendees grappled with how to allocate the 1.6 million new jobs and 2 million new residents projected for the region by 2030. After initially planning to use the Paint the Region¹ computer modeling software program to allocate growth, organizers opted for Lego® blocks, so as to provide a more tactile and interactive experience in playing the game. Following the exercise, the results were analyzed against predetermined indicators (percentage of development near transit, inside the beltway, within developed areas, etc.) and presented in the afternoon program, which was open to participants and the public. Robert Grow, founding chairman of Envision Utah, gave the keynote speech at the well-attended afternoon session.

Participants realized that there is a great deal of development potential within the existing urbanized area, especially near transit stops and in the eastern part of the region. Following on the success of *Reality Check* Washington, ULI Washington and the University of Maryland's National Center for Smart Growth assisted the Fredericksburg, Virginia, region in planning its own *Reality Check*, which took place in November 2005.

<http://washington.uli.org/Content/NavigationMenu30/Outreach/RealityCheck/default.htm>



Regional leaders participate in the Vision North Texas exercise.

Vision North Texas

Held on April 25, 2005, Vision North Texas was a collaboration between ULI North Texas, the North Central Texas Council of Governments (NCTCOG), and the University of Texas at Arlington (UTA). All three partners played important roles in planning and executing the exercise. NCTCOG has served as a strong leader on behalf of the public sector, and earlier work done by NCTCOG's Center of Development Excellence formed the foundation for Vision North Texas. UTA hosted the workshop. Vision North Texas's Regional Visioning Committee hired a project manager to lead the day-to-day aspects of planning the workshop.

At the workshop, approximately 200 participants viewed a display in Lego® blocks of the current long-range growth forecast for the ten-county region. Growth projections stated that 4.1 million new residents and 2.3 million new jobs would come to the region by 2030. Charts depicting the dramatic increase in the region's traffic congestion in the coming decades, even with \$45 billion in transportation investments, showed how the region would look if growth continues outward at its current pace. Speakers challenged the participants to see whether they could arrive at a better result by integrating land use and transportation decisions. After playing the game, participants used keypad polling devices to vote on the most important challenges facing the region, and the most important tasks that the Vision North Texas implementation effort should tackle. The workshop was the first phase of a multiphase visioning process. The Texas chapter of the American Planning Association recognized Vision North Texas with its 2005 Long-Range Planning Award. In October 2005, the ULI Foundation awarded ULI North Texas a Community Action Grant (www.actiongrants.uli.org) to develop a toolkit of implementation strategies and workshops to engage targeted groups of stakeholders and regional leaders.

<http://www.visionnorthtexas.org/>

Reality Check Plus: Imagine Maryland

Reality Check Plus: Imagine Maryland is a series of four growth visioning exercises held in the state's different regions—the central, western, and southern regions, and the Eastern Shore. They were organized by ULI Baltimore, the National Center for Smart Growth at the University of Maryland, and 1,000 Friends of Maryland.

Participants were invited from business, civic organizations, and the public sector throughout Maryland to the exercises held in May and June of 2006. Participants focused on allocating growth within their subregions. In all, 1.5 million new residents will come to the state over the next 25 years. The exercise was similar to those of Vision North Texas and *Reality Check* Washington, since for all four regions participants used land use maps and Lego® blocks to allocate growth. The program differs from earlier *Reality Checks* in that it required that 20 percent of added residential growth be affordable housing—represented with a different Lego® block color. Participants were also offered the opportunity to use Lego® blocks to indicate very low-density residential use, reflecting the rural nature of much of the state. The intended outcome following the visioning exercises is the development of policy recommendations for the state.

<http://www.realitycheckmaryland.org/>



Lego® blocks are placed during the *Reality Check Plus* exercise held in Central Maryland.

(SOURCE: © PAUL COELUS, WATERFORD, INC., 2006).

Background on Regional Visioning

Over the past 15 years, both across the country and internationally, regional visioning has emerged as a dynamic and important tool for building regional consensus on development issues. Regional visioning is increasingly being used to effectively engage local stakeholders in creating a framework for long-term regional planning, infrastructure investment, economic development decisions, and local land use decisions. Large and small regions and even some rural areas have undertaken such public participation processes in order to address issues of sustainability, social equity, and quality of life.

Broadly defined, regional visioning initiatives such as *Reality Check* efforts are programs that enable communities to become more aware of the impacts of development and the choices that are available to them to shape their regions. The programs can range from one day to several years in duration. To create an effective effort, it is critical that the vision be based on values that resonate in that region and reflect the lifestyle priorities and aspirations of the region's communities. Visioning exercises seek to build broad-based consensus on where and how growth should be accommodated. They are an opportunity for a diverse group of stakeholders to ask the questions: How shall we preserve, promote, and protect our strengths and assets? How shall we overcome the challenges faced by our region?

Many regional visioning efforts are broad and address all issues faced by a region, with a focus on growth issues. Many of these issues involve “problem sheds” that are regional in scale and thus resist solutions at the local level, such as air quality, traffic congestion, and affordable housing. Others focus more specifically on land use and transportation issues and result in public support for new transportation investments or for a broader mix of development choices in their community. Most of the visioning exercises around the country have been driven by similar concerns—namely that a continuation of existing land use patterns (typically, sprawl) will, if left unchecked,

- Consume valuable land and natural resources;
- Lengthen commutes;
- Accelerate water quality problems;
- Add to air pollution;
- Contribute to abandonment of older urban areas; and
- Require expensive infrastructure.

ULI leadership has been instrumental in a number of ways in several successful regional visioning efforts, including Envision Utah, Sacramento Region Blueprint, and Chicago Metropolitan 2020. Many smaller communities have undertaken visioning efforts with strong citizen involvement and support—Chattanooga, for example, can now point to more than \$2 billion in new investment over 20 years for projects and initiatives identified in its vision plan. Most regional visioning exercises share the following elements:

- Identification of the core values that affect regional growth attitudes and should guide priority setting and decision making;
- Documentation of the base case (current trends projection) and creation of realistic scenarios that reflect integrated alternatives for land use, transportation, and environmental choices;
- Education of stakeholders, including elected officials, the private sector, nonprofit organizations, and residents, about the impacts of each scenario and selection of a preferred growth scenario; and
- Engagement in education and implementation programs to advance support of the preferred scenario by local, regional, state, and federal decision makers.

Examples of prominent regional visioning efforts around the country that have influenced ULI's *Reality Check* program include Envision Utah, Chicago Metropolitan 2020, myregion.org, and Sacramento Region Blueprint.

Envision Utah

Envision Utah was one of the first comprehensive regional visioning efforts and it has become one of the premier models, widely respected for its broad-based public input and support. Formed in January 1997 as a project of the Coalition for Utah's Future, Envision Utah is a nonprofit public/private partnership that has spearheaded a regional dialogue for the 10 counties and 90 cities that form the Greater Wasatch region. The process has fundamentally altered public perceptions about growth and resulted in a widely accepted growth strategy. The well-thought-out process began with an in-depth values survey to gauge public opinion and values on growth and land use issues. This was followed by several years of scenarios analysis, research, and public involvement.

Two workshops engaged a broad-based coalition of stakeholders, including planning officials, elected officials, developers, business leaders, conservationists, and church and citizen groups, with each addressing one of two key questions: Where should we grow? How should we grow? At these workshops, organizers presented the participants with baseline scenarios for both 2020 and 2050, showing how the region would look if development occurred using current patterns. (This technique typically captures people's attention because it can be startling to see the region change so drastically.)

As a result of these workshops, Envision Utah developed four growth scenarios. The scenarios were then modeled to give the public an opportunity to see how the region would perform under each scenario. After conducting a public



ENVISION UTAH
.....
A Partnership for Quality Growth

The Envision Utah logo evokes the quality of life in the Greater Wasatch region by depicting a mountain range and a sense of community.

opinion survey about the scenarios, organizers developed a series of goals and held 50 town hall meetings and three workshops to devise implementation strategies to reach the goals. Ultimately, Envision Utah formed a quality growth strategy based on the publicly supported goals and strategies. The strategy aims to preserve critical lands, promote water conservation and clean air, improve regional transportation

systems, and provide housing opportunities to all residents. A newspaper insert delivered to 363,500 Utah households outlined the strategy and solicited feedback.

Through the Envision Utah process, Salt Lake City area residents understood that increasing housing choices in their communities was essential to allowing families to stay close to each other throughout the generational life cycle. They discovered that vibrant, walkable communities are important not only to convince their children to stay in the region after college but also so that residents will have local housing choices when their five-bedroom family homes become too much to maintain. Utahans also became convinced of the benefits of increasing transportation choices and supported the development of a greatly expanded rail transit network.

The success of Envision Utah can in part be attributed to the bottoms-up approach to engaging the public. This strategy required convincing each participant that his or her input was valuable, generating strong buy-in from elected officials

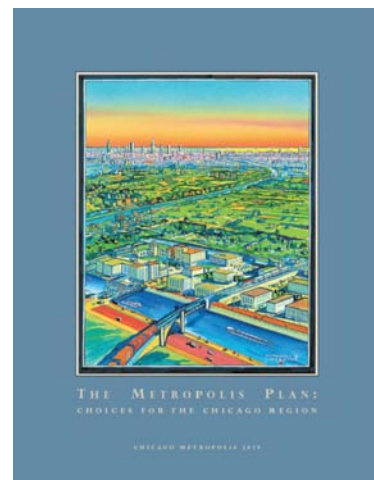
from the start, and engaging the media early in the process. The values survey results guided Envision Utah to use the term "quality growth" instead of "smart growth" and to refer to public transit as public transportation so as to better respect the values of the region. Follow-up has focused on the positive actions taken by jurisdictions and developers rather than criticism of projects that do not fit with the vision. It includes recognition by a popular awards program that Envision Utah and the state created. Envision Utah has received several of the nation's most prestigious planning awards, including the Urban Land Institute's Award for Excellence and the American Planning Association's Daniel Burnham Award.

<http://www.envisionutah.org/>

Chicago Metropolis 2020

In 1996 the Commercial Club of Chicago, a civic and business organization best known for hiring Daniel Burnham to create the Chicago Plan of 1909, led a visioning effort in the six-county Chicago metropolitan area. Private sector leadership was especially prominent in the effort: more than 200 members of the club examined growth and urban sprawl issues in a process adapted from Envision Utah. The culmination of the two-year effort was Chicago Metropolis 2020, a regional plan published by the University of Chicago Press in 2000. The visioning effort focused on two main areas: an assessment of regional housing needs and land use planning for freight transportation centers, an essential but easy to overlook component of the regional economy.

www.chicagometropolis2020.org



The culmination of the two-year effort was Chicago Metropolis 2020, a regional plan published by the University of Chicago Press.

Myregion.org

Myregion.org is an organization of citizens and leaders from the public, private, and institutional sectors who are working to improve the central Florida region.

Composed of 18 public and private organizations representing seven counties and dozens of cities, myregion.org aims to help the region compete more effectively while also improving the quality of life of its citizenry. Goals include organizing and training regional leaders, creating educational materials to guide regional efforts, identifying key issues and opportunities, and fostering an understanding of regionalism.

In May 2006, myregion.org convened more than 20 municipal mayors from seven counties in the region to discuss growth and transportation issues common to each jurisdiction. This event kicked off a year-long effort to create a unified vision of growth in the area for

the next 50 years. Although this effort will not have any legal authority to enforce growth regulations, it is hoped that the leaders will develop shared principles and trust that will help guide the region.

<http://www.myregion.org>

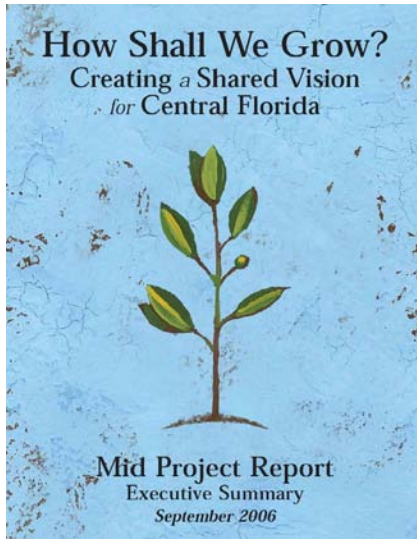
Sacramento Region Blueprint

Sacramento Region Blueprint is a comprehensive regional process integrating land use, transportation, air quality, and other regional concerns. It began with in-depth modeling and research, conducted by the Sacramento Area Council of Governments (SACOG) in cooperation with all jurisdictions in the region, that looked at how future growth is likely to occur. The first product, called the Base Case Future, outlined the effects of current growth trends on housing availability, land consumption, the environment, and traffic congestion, and included in-depth demographic projections.

Beginning in March 2003, Sacramento Region Blueprint held a series of workshops—first at the neighborhood level, then at the county level, and finally at the regional level. Blueprint used a real-time, interactive geographic information systems (GIS) software program² (called PLACE³S) to create growth scenarios. A series of workshops, media outreach, surveys, forums, and town hall meetings engaged the public and other stakeholders. Ongoing efforts have resulted in SACOG approving a preferred Blueprint scenario for 2050 that will become part of SACOG's long-range transportation plan for the six-county region.

<http://www.sacregionblueprint.org/>

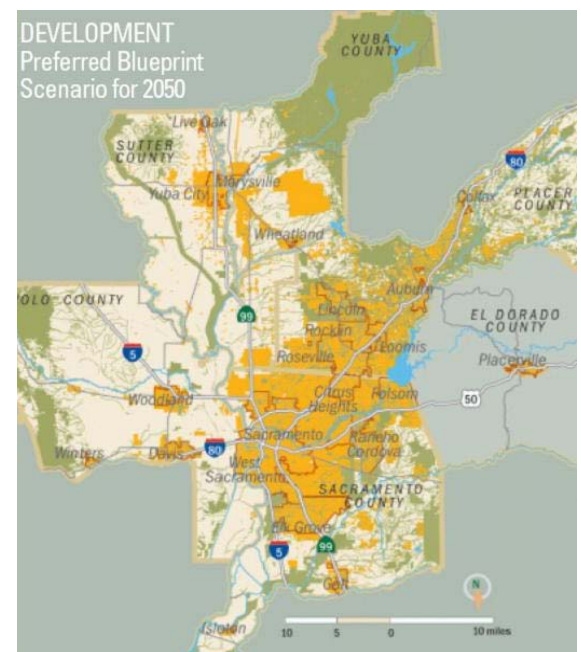
Sacramento Blueprint's Preferred Scenario for 2050 as adopted in January 2005.



Cover of myregion.org's September 2006 report *How Shall We Grow?*



Regional leaders participate in a regional workshop held by myregion.org in October 2006.



Importance of Regional Visioning in the New Global Economy

Why should jurisdictions act regionally through cooperation and visioning? To remain economically competitive, a region needs a vision for how it will grow, how it will protect its natural resources, and how it will provide affordable housing and mobility. Managed well, growth can be a boon for a region, adding value to its communities and quality of life. Managed poorly, growth can result in housing prices soaring or dropping, traffic congestion, the loss of open space, and degradation of air quality. The issue of where a region should grow is an important one for both fast-growing regions and those that are losing population and jobs, because the current development trend in both types of regions is for rapid development of greenfield land in exurban locations. Greenfield development requires the installation of expensive new infrastructure systems and schools, and it often comes at the expense of existing communities in slow or no growth regions. Although infill development and downtown living are receiving greater attention from the development community as popular choices among some segments of the housing market, this type of development still represents the minority of new construction.

Although it may seem that existing development choices are hard to change, growth creates significant opportunities to reshape a region. As Arthur C. Nelson, PhD, of Virginia Tech's Urban Affairs and Planning Program in Alexandria, Virginia, states in a recent report for the Brookings Institution:

In 2030, about half of the buildings in which Americans live, work, and shop will have been built after 2000. The nation had about 300 billion square feet of built space in 2000. By 2030, the nation will need about 427 billion square feet of built space to accommodate growth projections. About 82 billion of that will be from replacement of existing space and 131 will be new space. Thus, 50 percent of that 427 billion will have to be constructed between now and then.³

Shifting demographic patterns create another opportunity to revise the form of many communities. Changes in demographics have resulted in a shift of household composition across the country. According to 2000 U.S. Census data, 65 percent of households do not have children and the predominant trend is toward a higher number of smaller and untraditional households than in past decades. Although construction of many new single-family houses is inevitable, smaller homes and attached housing units will also be needed to accommodate these new households—creating opportunities for lively mixed-use districts that will also serve the needs of an aging population.

Another challenge to regional cooperation is that political boundaries created 200 years ago have little relevance to the way people live, work, and play in the 21st century. Most of us cross county and even state lines several times a week as we commute to work, pick up our children at school, and go shopping on the weekend. Both business leaders and public officials face the reality that regional trends greatly affect local decisions and vice versa. The fragmented nature of government in many regions, especially in the Northeast and Midwest, also has a serious impact on the health of a region. Many regions have a “favored quarter” where many new jobs and upscale housing units are built. Often, the inner city and inner suburbs in the “unfavored” quarters experience varying degrees of disinvestment in comparison. Regionalist Myron Orfield, professor at the University of Minnesota and research fellow at the Brookings Institution, frequently comments on this topic:

Most residents in America's largest metropolitan areas live in communities that are facing challenges of either growing social needs or rapid population growth. Poorly planned, inefficient development and the regional competition for tax base are hurting almost every city and suburb—wasting resources, harming the environment, and undermining the nation's promise of equal opportunity for all. We should be working together to make fundamental changes to the policies shaping our communities.⁴

So how does a region build on its current strengths, while also facing these realities, to ensure that it becomes more desirable over time? ULI has found that those regions that best enhance their competitive positions are the ones that consistently invest resources in the creation of a clear regional vision—a compelling statement about where and how the region wants to grow, which is solidly based on widely shared community values and reflects a broad consensus developed after analysis of real alternatives. The task cannot be left to local governments but instead should be carried out through a coordinated and collaborative process so that all resources are used to optimize the competitiveness of the region. It has to be a vision that is clear enough to give real guidance to public and private sector investment decisions, a vision that has strong, sustained private sector leadership, and a vision that compels action.

What Makes *Reality Check* Different?

First, *Reality Check* engages the private sector from the beginning—ULI is always the lead sponsor or a cosponsor. Having ULI in a leadership role results in greater participation and buy-in from the business community. This also brings credibility to the effort. Conventional regional visioning efforts are often organized by representatives of the public sector, who then find that it is difficult to engage the region's business community once the plan has been created. Lack of private sector buy-in for the effort often results in a plan that does not get implemented. *Reality Check* brings the business community to the table while also engaging elected officials, civic organizations, citizens, and other interest groups. As a result, it is a more integrated approach to solving and discussing land use issues on the regional scale.

“As a professional in the business, I knew [future growth]...was big, but until I saw it physically on a map, with those little plastic blocks, I really didn't know how big it is.”

—Jim Todd, President of the Peterson Companies, participant in *Reality Check* Washington

Second, unlike regional visioning efforts that can last for years, *Reality Check* aims to establish an understanding of the region's growth issues in the few hours that it takes to play the game. This understanding can then be developed into an implementation strategy that mirrors other well-known regional visioning efforts. *Reality Check* not only brings together regional leaders and citizens to speak about the issues, but also gives them an active learning experience that can significantly change their preconceived notions about those issues. Leaders find shared principles, explore solutions to familiar conflicts, and develop innovative ideas about how and where to place the allocated growth. Tangible experience and realistic constraints enable participants to grasp the challenges of growth readily.

Adaptability of *Reality Check*

The *Reality Check* model is most effective when it is adapted to meet the unique challenges faced by each region. Below are two examples of how it can be tailored to address specific issues.

***Reality Check* and Infrastructure**

Give consideration to the treatment of infrastructure needs in designing the *Reality Check* exercise. In Los Angeles, participants were able to draw key infrastructure needs on their maps as long as consensus was reached. In Washington, participants were directed to consider only existing infrastructure in their growth allocations, but needed improvements could be recorded in the scribe's notes. In its 2007 *Reality Check*, ULI Seattle is designing an exercise to directly address infrastructure tradeoffs and how to finance needed improvements.

***Reality Check* and Rural Areas**

The *Reality Check* exercises held in the southern, western, and Eastern Shore regions of Maryland are the first examples of *Reality Check* focusing on regions that are primarily rural. While both the Eastern Shore and the southern region have small towns and strong farming traditions, they now face exurban development and the associated growth issues. The western region, by contrast, has a very low growth rate and a strong interest in attracting economic development. The game was played identically in the rural areas and in the central region, with two differences. In the rural areas, the map grid was scaled to represent a 1/2 mile square, instead of just under one mile as was the case in the central region, and the densities associated with each Lego® block were reduced according to the region's lower projected growth numbers.

Vision North Texas devised a system to allow participants to scatter development in the rural parts of the region instead of intensely developing in a one square-mile area. Participants could draw a 16 square-mile box around 16 grid cells and place blocks in that area at a lower density.

In rural areas, regional dialogue is intensely personal and building trust is even more important. At the Eastern Shore event, a trusted and familiar leader from the community introduced each speaker. This tacit endorsement of each speaker helped the local participants trust the outside speakers.

How Does *Reality Check* Work?

Observing a *Reality Check* exercise is the best way to understand how it works. The videos produced by several District Councils, available online, also offer insight into how *Reality Check* works. Below is an agenda outlining how the prototypical exercise unfolds. More explanation can be found later in this guide.

Prototypical Agenda

The day typically starts with a networking breakfast. The start time varies, but most start check-in and breakfast between 7:00 a.m. and 8:00 a.m. District Councils typically handle registration, at which point participants receive a table assignment, information packet, and name badge. Each participant is assigned to a table of eight to ten leaders from the region, with a facilitator and a computer operator/scribe. Each table should include at least one developer and participants representing a balance of professional, geographic, gender, and ethnic diversity.

Introductory Speeches

Once the majority of participants are seated, a series of speakers get the program underway. First, one or more welcome participants and introduce the general concept of *Reality Check*. Then, a speaker sets the context for the exercise by describing the region's current growth patterns and issues. Finally, a speaker lays out the framework and rules of the *Reality Check* game.

Game Rules and Guiding Principles

Following the introductory speeches, participants then focus their attention on their tables before the game begins. The facilitators outline any additional rules or guidelines and give an overview of the map. The facilitators then detail the densities associated with each combination of jobs or housing Lego® blocks or chips. Initial participant discussions should include introductions.

Before placing Lego® blocks or chips, participants at each table are asked to suggest and agree on a set of overarching principles to guide their growth allocation decisions. The computer operator/scribe at each table records the principles, which are then collected and tabulated.

The Game

The length of the game varies, but most last about two to two-and-a-half hours. The timing of each portion of the program should be carefully calculated to make sure that the participants are adequately informed of their challenge and get ample time to allocate the growth, and that computer operators have enough time to count the chips or Lego® blocks. The process typically is as follows (see the agendas in the appendices for more details):

- Develop guiding principles to allocate the projected growth (20–30 minutes).
- Discuss and determine which areas should be protected from new development—that is, which should remain parks, open space, woodlands, or for agricultural uses (optional; 10–15 minutes).
- Discuss the region's infrastructure needs (optional; 10–15 minutes).
- Discuss and determine where growth should be directed in infill and greenfield areas, for what uses (housing, jobs, or a combination), and at what densities; place Lego® blocks or chips on the map (1.5–2 hours).
- Fine-tune the collective vision, making changes as necessary (15 minutes).
- Review and finalize the development scenario. There are several options for discussion items at this point, such as identifying the principles and policy guidelines that affected decision making, and the impact the scenario will make on the region as a whole (15 minutes).
- Discuss the implementation barriers and policies and the implications of how the growth has been allocated (optional; 30 minutes). An interactive element on this topic worked well at Maryland's *Reality Check Plus*.

Organizers should notify facilitators of the start of each new section of the agenda, so that they can be sure that their table is on schedule. Many tables may finish the game early; for example, the majority of tables finished early at Vision North Texas and the Washington *Reality Check*. If this happens, the facilitators can encourage the participants to spend more time discussing how the growth reflects the guiding principles or more time on the implementation and implication discussion.

Lunch & Afternoon Session

After the morning exercise is over, lunch is served in a separate room and the results from each table's map are tabulated by the facilitator and computer operator/scribe and synthesized on site with those of the other tables. Each table's computer operator must record his or her table's results, with help from the scribe or facilitator, by attributing every Lego®

block or chip to the grid cell on which it was placed. A data analysis team quickly prepares a PowerPoint presentation summarizing the morning's results for the afternoon session. The results presentation often highlights the average trends and shows which tables allocated growth in a way that most closely follows various trends and indicators.

The collective results are presented in the afternoon as a summary of the day, so that participants can see their results before they leave. This portion of the program typically includes a keynote speaker and an interactive panel. The afternoon session is often open to the general public, sometimes for a small fee. Both the Washington, D.C., and Vision North Texas programs closed with celebratory networking receptions. These provided an opportunity for participants to continue cross-regional discussions and for organizers and staff to reflect on a meaningful and hard day's work.

Who Needs to be Involved with *Reality Check*?

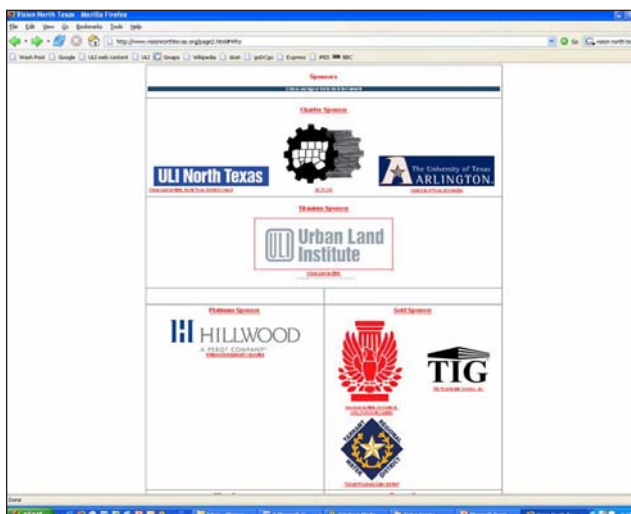
The leadership of *Reality Check* needs to look like the community. It needs to be credible and balanced, with representatives from a diverse group of stakeholders, including environmental, business, civic, government, and academic institutions. A *Reality Check* event is time intensive, so it requires a strong commitment from staff and volunteers for the event itself and for the implementation phase. The make-up of the leadership is critical to ensuring a balanced invitation list, attracting sufficient resources, raising funds from different sources, and creating a group of committed volunteers.

Partners

For smaller District Councils, partnerships will be crucial for the success of the exercise. One key to selecting a good partner or partners is finding organizations or institutions that have built trust between different stakeholders in the region. The Washington Smart Growth Alliance proved to be such an organization. Prior to getting involved with *Reality Check*, the Alliance had been building trust among its own five disparate stakeholders. The Greater Washington Board of Trade and the local homebuilders association had come to agreement with environmental groups on smart growth project criteria, now formalized as the Smart Growth Project Recognition Program.

Key Partners and Cosponsors

The Urban Land Institute is the logical lead partner in organizing a regional visioning exercise because of the organization's strength as a convener. District Council leaders and staff members also have the requisite knowledge of their region's growth patterns and connections with the public officials and the land use and real estate professionals engaged in the region.



The Vision North Texas listed of the groups who partnered to organize the regional visioning exercise on their web site.

Other key partners in past *Reality Check* exercises have included organizations such as the North Central Texas Council of Governments, the Southern California Land Use Forum, Fannie Mae, and 1,000 Friends of Maryland. The following are the key partners and cosponsors who should help lead the effort:

College and University Alliances

University partners can be very useful in providing technical assistance for *Reality Check* efforts. They can provide the following expertise and elements for the exercise:

- Data analysis and tabulation;
- Population and employment projections;
- Production of GIS land use maps;
- Computer operators;
- A strong speaker to present results;
- A less expensive or free venue for the exercise.

It is important for ULI leadership to decide whether the university will be a lead partner in the *Reality Check* effort or under contract for its role. Major universities are also important regional employers and economic development catalysts and thus their representatives should also be included as participants in the exercise.

Additional Partners

Additional partners will most likely be needed. They may be organizations, institutions, or companies that are able to contribute one of the following:

- Money;
- In-kind resources;
- Leadership;
- Credibility.

All major partners should be represented on the steering committee. Groups that are not key partners can still be involved in planning the exercise and implementation, while contributing an amount (cash or in-kind) that is in scale with their budgets and interests. The goal is for the steering committee to consist of a diverse group of stakeholders that will ultimately be reflected in the composition of the invitees to the exercise.

A **metropolitan planning organization (MPO)** is a regional transportation planning body whose approval is required on transportation improvement plans for federally funded infrastructure projects. MPOs aim to achieve local consensus on these projects across the jurisdictions in a region and also ensure that plans are fiscally sound and consistent with federal environmental legislation. **Councils of governments (COG)** are regional bodies that are sometimes called regional councils, regional commissions, or development districts. A typical council serves a region by addressing issues such as regional and local planning, economic and community development, mapping, transportation planning, emergency planning, aging services, water use, and pollution control. Membership in the COG is drawn from the county, city, and other government bodies within the area.

- The regional metropolitan planning organization (MPO) or council of governments (COG) can usually supply the official growth forecasts and information on existing densities and land uses as well as key insights into regional growth trends.
- Local, regional, or state planning departments could also be valuable partners and sources of experts, data, mapping, and funding.
- Business organizations, such as private companies or chambers of commerce, can be valuable cosponsors, given the importance of engaging the general business community in the planning efforts, the exercise, and the implementation phase.
- Trade organizations, such as the local home-builders and realtors associations, can help generate buy-in from the business community.
- In addition, it is important to involve organizations dealing with environmental, conservation, social equity, or citizens' advocacy issues.

Project Manager

Organizing *Reality Check* requires significant staff resources, and payment for that time can be a major budget item. It is important to have one person serving as project manager, so that there is one point of contact for the effort. This person could be the executive director of the District Council or a paid consultant under contract to ULI. Vision North Texas hired a part-time project manager and other *Reality Check* efforts have followed suit. Many District Councils that are planning or interested in holding a *Reality Check* do not yet have executive directors, so the hiring of a project manager becomes even more important. Even when a District Council does have full-time staff, organizing *Reality Check* is often too much for one person alone; ULI Washington's executive director shared project manager duties with the Smart Growth Alliance director (who was paid \$20,000). For all such arrangements, it is critical to create and sign a contract outlining duties, expectations, and costs (a sample contract is provided in the appendices).

Steering Committee and Subcommittees

The creation of a steering committee of major stakeholders is a critical step. The steering committee and its various subcommittees provide accountability, expertise, and the resources necessary to hold the event. The committees can be led by one chair or by cochairs. It is important that ULI has a strong presence as chair or cochair of each subcommittee. In addition, it is recommended that the following committees be created with the following responsibilities⁵:

Data Collection/GIS

- Identify data and GIS requirements and sources.
- Produce map for visioning exercise.
- Develop guidebook for participants.
- Create framework for analysis of results.

Visioning Exercise/Program

- Produce parameters of visioning exercise and rules.
- Identify and secure venue and handle logistics for day of event.
- Develop agenda for day of event.
- Identify and recruit speakers.
- Coordinate speakers and manage event.
- Wrap up.

- Train facilitators and scribes.
- Hold several simulations of the exercise and a dress rehearsal.

Finance/Sponsorship

- Prepare and administer budget.
- Identify sponsorship sources and create appropriate mechanism to collect and recognize contributions.
- Solicit contributions.
- Identify and solicit other sources of revenue.

Communications/Outreach

- Identify key stakeholders.
- Produce pre-event materials.
- Establish media relations program.
- Hold a press conference to generate interest in and understanding of *Reality Check* by media and other interested parties.
- Produce postevent report.
- Coordinate postevent scorecard and follow-through.

Postevent Implementation

- Develop implementation strategy early in process.
- Develop and roll out an implementation plan for the postevent phase of *Reality Check*.
- Analyze results of *Reality Check* exercise and policy implications.
- Work with area organizations to further outcome of *Reality Check*.
- Develop metrics and potential accountability.
- Track and recognize positive policy changes stemming from *Reality Check*.

Volunteers

Every *Reality Check* relies heavily on a large pool of experienced volunteers. These individuals serve on the committee or subcommittees, facilitate and record the workshop groups, and provide assistance in tabulating the results, managing registration, and other logistics. The steering committee should take the lead in recruiting volunteers. Volunteers will need training by either the project manager or relevant subcommittee leaders.

What Does It Take to Plan *Reality Check*?

Planning a *Reality Check* event can last one to one-and-a-half years because of the time it takes to plan logistics, raise funds, and build awareness and buy-in. When the event ends, a District Council should plan to continue its involvement with *Reality Check* by leading or playing a role in the implementation phase. This can extend the commitment by several years. A critical component of any *Reality Check* planning effort is a communications and outreach strategy.

Selecting the Date for a *Reality Check* Exercise

Consider other important events taking place throughout the year that may affect attendance, such as a key conference or a holiday. Also make sure that all local and state elections are taken into consideration; for example, do you want your event to take place before or after a major election? The academic calendar may also be a consideration, to ensure the availability of students to serve as computer operators/scribes and on the data analysis team.

Major Phases

There are four major phases to planning a *Reality Check* event (note that the phases after the exercise may overlap somewhat).⁶

Phase I: Forming Strategic Partnerships and Identifying Key Leadership (*approximately three months*)

- Form partnerships with organizations that provide leadership credibility, are broadly representative of stakeholder groups, or can contribute key financial or in-kind resources.
- Establish alliances with local, regional, and federal planning organizations and academic institutions to provide in-kind and contracted services for data, analysis, and mapping needs.
- Form a steering committee and subcommittees composed of representatives from each partnering organization and other key stakeholders. Subcommittees of the advisory committee should be formed for each major planning task, with strong ULI leadership for each.

Phase II: Major Planning Tasks (*approximately one year*)

- In early meetings, determine the key goals of the exercise and the takeaways for the participants, to guide all planning efforts.
- Establish geographic boundaries for the exercise, identify data requirements for mapping, and develop software specifications.

- Develop growth projections for both new residents and new jobs, on which growth allocations for the exercise will be based.
- Develop the parameters of the visioning exercise and produce a guidebook to accompany invitations to participants.
- Develop training manuals for facilitators, scribes, and operators and hold exercise simulations to properly train and test tools and outcomes.
- Develop the invitee list for the event—participants should include political, environmental, business, real estate, and civic leaders.
- Create a media and outreach plan to generate excitement about *Reality Check* and to inform participants and the general public leading into and following the event.
- Develop the program agenda, recruit speakers, and coordinate logistics for the event.
- Identify sponsorship sources and create an appropriate mechanism to collect and recognize contributions.
- Hold mock sessions to test parameters, density visualizations, the map, and computer programs. The trial runs will help show what changes need to be made to the game and to computer processing of the data, and how best to train facilitators. Also, hold a dress rehearsal of the event.
- Develop criteria by which the exercise and implementation will be measured.

Phase III: Engaging the Region's Leadership (*approximately three months*)

- Prior to the event, conduct information sessions with key leaders to gain early buy-in.
- Hold a press event to announce the project.
- Draft or supervise the drafting of a postevent report to be rolled out at a media event, ULI District Council event, and other major stakeholder events. In addition to illustrating leading growth scenarios and consensus principles, the report should offer in-depth analysis of the fiscal, environmental, social, and governmental implications associated with the scenarios.
- Follow up with key leaders to review the contents of the report and next steps for *Reality Check*.

Phase IV: Engaging the Community (approximately one year)

- Multiple strategies are available to engage the broader community; they should be selected on the basis of the issues in the region:
 - Before the event, engage community and neighborhood groups to announce and explain the project.
 - Create opportunities on the web site for the general community to become involved in the regional growth dialogue.
 - Perform a buildout analysis of each jurisdiction within the *Reality Check* borders to depict how the region will look if remaining undeveloped land is developed in accordance with current local zoning.

Following the exercise, engage the community in the following ways:

- Compare buildout results with *Reality Check* scenarios.
- Hold subregional *Reality Check* workshops to broaden participation in the process through the region and gain more detailed information on vision scenarios at the sub-regional level.
- Synthesize scenarios and viewpoints from the main event and subregional workshops and develop leading scenarios and consensus principles derived from broader stakeholder input.
- Reconvene regional leaders to share scenarios and consensus principles to get buy-in and support for a multidimensional visioning implementation program.

Phase V: Implementing a Shared Regional Vision (six months to several years)

- Build consensus for action to change local, regional, and perhaps state policies and practices related to land use.
- Extend best practices, tools, and technical expertise to jurisdictions and developers wishing to adopt policies and practices that support the consensus principles.
- Support and recognize political leaders who advance shared principles.
- Sustain a long-term education campaign for leaders and the general public.
- Create a reporting mechanism to track and recognize policies and practices as they compare with the principles.
- Work with a key partner to develop an implementation effort, such as ULI Los Angeles's initial involvement in SCAG's infill strategy.
- Help create a sustainable entity to carry out a multiyear implementation strategy, similar to Envision Utah.

Communication and Outreach

Communication and outreach are key components of a well-attended, well-publicized, and well-supported *Reality Check*. A communications subcommittee should begin early in the planning process to build buy-in from local elected leaders and create a drumbeat of interest in the event and its aftermath among a broader community of stakeholders. A number of specific communications tools must also be developed, including a web site, participant guidebook, final report, and video of the event, and special efforts are needed to engage local and regional media. It is important that all products share the same message and tone and help promote *Reality Check*.

TIP >> Develop a logo and graphic identity that will be remembered and easily recognized. Maryland's *Reality Check* Plus logo, for example, ties in elements similar to those found on the state's flag.

TIP >> Consider hiring a public relations consultant to support the *Reality Check* outreach efforts. This person will draft and implement a communications strategy, write press releases, and deal with the media.

Spend time developing the packet that will be sent to participants before the exercise. It is important to make a good first impression and ensure the credibility of the process. Vision North Texas, for example, sent out a packet of background materials well in advance of the workshop. The packet included a Vision North Texas workbook, NCTCOG reports on regional demographic trends and background summaries on environmental issues, and the ten principles of development excellence adopted by the NCTCOG General Assembly. It also included a copy of the report that recommended regional visioning for the five-county region and also a sponsorship form.

After the initial planning, consider holding an event to solicit support and buy-in from the larger community in the region. *Reality Check* Plus in Maryland presented its program goals and explained the *Reality Check* process to the Greater Baltimore Alliance, a group of prominent business leaders. *Reality Check* Tampa Bay held a forum to engage the environmental, public, and private sectors, at which ULI staff presented *Reality Check* and regional growth choices and answered questions from the audience. The Tampa Bay organizers handed out commitment cards to the audience and generated a considerable amount of interest in sponsoring or assisting in the organization efforts. Commitment

cards can be used to solicit financial support, institutional support, and volunteer support.

In addition, solicit sponsoring organizations and other civic and professional organizations to include information about the exercise in their web sites, newsletters, and e-newsletters. Hold meetings early in the process with local jurisdictions, private businesses, and nonprofit organizations to generate buy-in. Important components of these meetings are showing a *Reality Check* video and leaving copies of a brochure detailing the *Reality Check* effort.

Maryland's *Reality Check Plus* logo incorporates elements similar to those found on the state's flag.



TIP >> Create a PowerPoint presentation that highlights the goals of *Reality Check* and what the event entails, to show to potential sponsors, interested organizations, and local jurisdictions.

TIP >> Showing the video from one of the previous *Reality Check* events is a great way to engage and educate potential sponsors, volunteers, and attendees.

TIP >> If the budget allows, create a video documenting *Reality Check* and summarizing the experience of the participants and the results of the exercise. It should be approximately 10 minutes long and should acknowledge all partners and major sponsors. If this is not possible, seek an in-kind contribution by a university media class or similar organization to capture footage of the event, so that a video could be made in the future if funds permit.

Media Relations

Engaging the local and regional media is hugely important during the planning stages of any *Reality Check*. Since *Reality Check* is about raising awareness of the ramifications of regional growth patterns and trends among an audience broader than the exercise participants, a strong media presence is essential to convey the message. A successful strategy is best carried out by contacting the media early and keeping editors and reporters informed of the issues and events associated with *Reality Check* through press releases and briefings. Contact the editorial boards of

local newspapers and write letters to the editor to raise awareness of growth issues well in advance of the exercise. The media strategy for *Reality Check* should include one or more designated spokespeople.

Targeted events to engage the media, such as press conferences, can help share the message of *Reality Check* and the implications of current growth issues with a larger audience across the region:

- Hold a rollout press conference for elected officials, sponsors, and media in advance of the exercise, perhaps to coincide with the distribution of the invitations.
- The chair(s) of the leadership committee should introduce the concept of *Reality Check* and explain its importance to the region.
- Show a *Reality Check* video, such as the Washington, D.C., film, at the beginning of the press conference.
- Give sponsors an opportunity to get some visibility and share why they are supporting *Reality Check*.
- Send biweekly e-mail blasts to participants and the media in the months before the exercise to generate attendance at the morning and afternoon session and produce a more informed audience. These e-mails are also a good opportunity to give the sponsors more visibility.

In addition to engaging the media before the event, it is important to include the media on the day of the exercise. Inform the media of the date well in advance and set up media passes for the venue. There should also be a media briefing at the event itself, with key leaders and high-profile



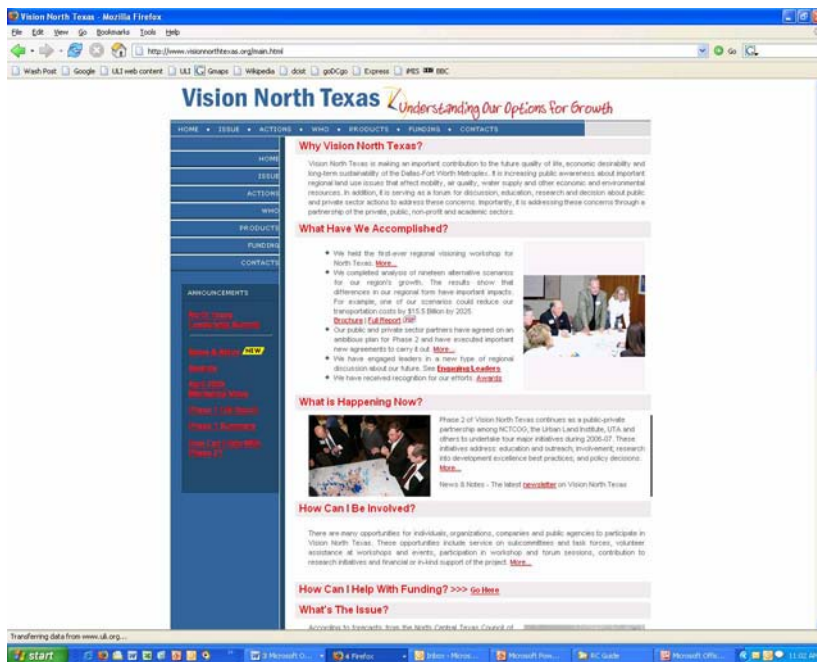
ULI Washington and the Washington Smart Growth Alliance hired a video production company to film the *Reality Check* event and produce a short film summarizing the event.

attendees available for interviews. The Los Angeles exercise was well received by the media; in fact, print and broadcast coverage of the event has been valued at nearly \$61,000. The media coverage, including follow-up articles after the event, brought the idea of “6 million more people here in the next 20 years” to the general public.

Web Site

A web site is a valuable tool to help publicize and share information about *Reality Check*. It should be treated as a communication tool and should not be relied on to generate buy-in for *Reality Check*. Sites should be tailor-made for each *Reality Check*, with their own web addresses and designs. They can include images and maps of the region and a description of the implications of current growth trends. A calendar of events is a good resource to include. In addition, a web site can be a useful tool for committee members, since the project manager can save documents on a password-protected section of the site. The web site should make available to the public PDF versions of all *Reality Check* documents and posts of events, briefings, and discussions of next steps. A total of 734 browsers visited the Washington, D.C., *Reality Check* web site within 24 hours of the exercise; 27.39 percent of these visitors

A web site is a valuable tool to help publicize and share information about *Reality Check*.



participated in an online survey and 18.55 percent downloaded the guidebook. A survey, especially one that gauges the public's impressions of growth issues both before and after the exercise, can provide valuable data for the organizers. An online survey can also allow members of the general public who were not invited to or who could not attend *Reality Check* to provide input after a set of growth scenarios is developed.

TIP >> If possible, the web site's URL should refer to the name of the exercise, so that it is easy to remember.

TIP >> Pay particular attention to the message and tone of the web site and make sure that it matches all printed material.

Printed Materials

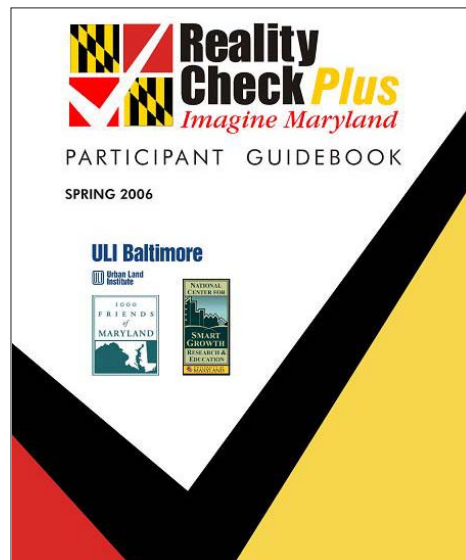
For a successful *Reality Check* exercise, several publications are necessary (see examples in the appendices).

Brochure: This document will be used to promote *Reality Check* to potential committee members, volunteers, sponsors, and the broader public. It is most likely a glossy, multicolored, fold-out handout to be used while building awareness and buy-in for the exercise.

Participant Guidebook: This product, often prepared by a university partner, COG staff, or a contract writer, serves as the how-to guide for participants. It also represents an opportunity to present a snapshot of the region and its growth challenges to a very influential audience. It should provide an overview of the following elements:

- Past visioning efforts and why *Reality Check* will be different;
- How to play the game;
- A detailed description of the growth issues facing the region;
- Population and demographic trends;
- Job growth and location trends;
- Development trends;
- Housing supply;
- Transportation and commuting patterns;
- Images that effectively convey the densities associated with each block or chip, representing the diversity of landscapes, building types, transportation options, and people in the region.

- Participants need to receive the guidebook well in advance of the exercise so that they have time to read and digest it. It should be substantive and comprehensive and provide take-home value for participants. The guidebook gives the organizers a chance to encourage undecided invitees to attend the exercise. The Washington, D.C., Reality Check guidebook, for example, included a list of organizations that had already agreed to participate in the event, to persuade undecided invitees to attend. The participant guidebook gives organizers the opportunity to publicly thank the committee members, volunteers, and sponsors. It can also include biographies of the speakers, as the Vision North Texas guidebook did.



The *Reality Check Plus* Participant Guidebook was printed on newsprint paper stock and mailed to participants and was also available for download as a PDF on their web site.

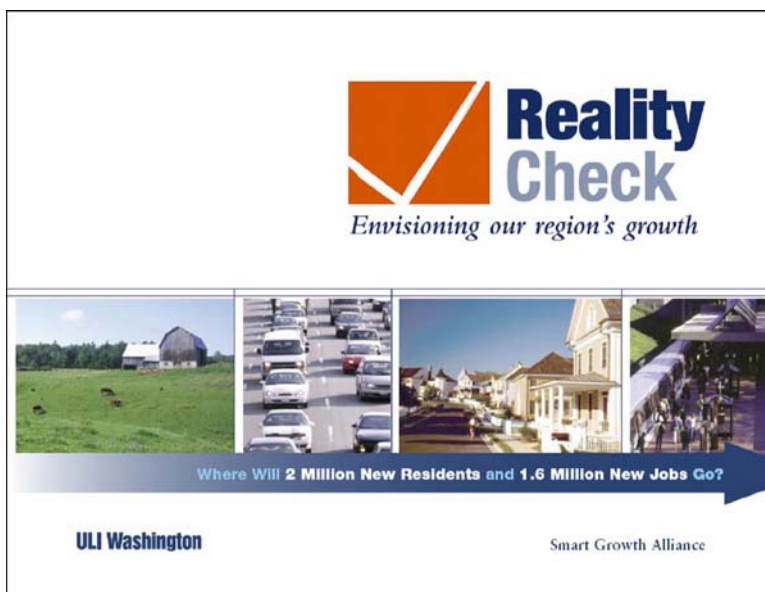
Facilitator/Computer Operator/Scribe Training Document:

This document serves as the guide for volunteer facilitators, computer operators, and scribes (if necessary). The text for facilitators outlines the rules of the game and the steps to include, and provides a loose script to follow during the exercise. The computer operator text details how to enter data into the Excel spreadsheet and how to generate the maps needed to share the results with the audience.

Final Report: This document summarizes the objectives and in-depth findings of the visioning exercise. It is shared with the participants shortly after the event and should be available for download from the project web site. The final report often includes the following items:

- A list of participants and their companies, organizations, or jurisdictions;
- Methodology;
- Maps showing existing and proposed development patterns;
- Common themes in the guiding principles;
- Exercise results;
- Findings;
- Implementation recommendations;
- Conclusions.

A fold-out version of the map used in the exercise could be included in the final report. A short, illustrated brochure to summarize the final report can be an effective document and can often be completed and distributed before the final report. The Los Angeles and North Texas efforts each created such a document and found it to be a worthwhile endeavor. It is important, in both the final report and the summary, to include information about how interested parties can get involved in the next steps. Organizers typically set a deadline for producing the final report ranging from three to six months after the exercise, and its release might correspond with the unveiling of a more detailed implementation plan.



The final report, such as the Washington *Reality Check* final report, *Envisioning Our Region's Growth*, summarizes the objectives and in-depth findings of the visioning exercise.

What Are the Elements of the *Reality Check* Exercise?

The *Reality Check* exercise consists of a complex set of elements, including background research on regional trends, a long list of equipment, a dedicated cadre of leaders and volunteers, and a large venue, among a host of other items. Tools at each table include a large map of the region, Lego® blocks or paper chips, copies of the guidebook, a laptop computer used by an operator to capture and analyze the table's decisions, an easel and pad for the facilitator to capture guiding principles, and often a flag for summoning help from an organizer. The sections of the exercise itself, which is described in greater detail in this section, include the guiding principles, the data analysis of the morning's growth allocations, and the afternoon session.

Growth Projections and Regional Context

The baseline for the *Reality Check* exercise is a credible growth projection for population and jobs within the selected geographic bounds of the exercise. Growth projections should be based on the best available numbers and are not open for review by participants in the exercise. Selecting the target year for the growth forecast is important, since it should be beyond the scope of existing planning but not so far away as to dilute the relevance of the effort. For example, the Vision North Texas exercise was based on an anticipated 4.1 million new residents and 2.3 million new jobs over the 25 years to 2030. The credible and neutral NCTCOG produced the growth forecasts. ULI Los Angeles asked participants to allocate the 6 million new residents coming to the region in the next 20 years, an influx that would result in 2 million new homes and 2.2 million new jobs throughout a five-county region.

Lego® blocks from the *Reality Check Plus* exercise in Maryland depicted housing, jobs, and included separate block colors for affordable and low-density housing.

(SOURCE: © JACK LYNN, LLC 2006).



Establishing current growth trends and the impacts of those trends is also important. For example, if current trends continue in the north central Texas area, only one-third of new homes and jobs will be located in the existing Dallas–Fort Worth urbanized area; the other two-thirds will occur in currently rural areas on the fringes of the metro area. Organizers were able to convey the importance of the visioning exercise by linking the regional land use issues that will arise and affect mobility, air quality, water supply, and other economic and environmental resources if current growth trends continue.

Be aware that although data projections have limitations, there is usually not much ability to modify the projections that are currently available. Some numbers might not reflect a recently announced change to the region and its economy. In Maryland, for example, the central region projections used in *Reality Check Plus* did not include numbers reflecting the Department of Defense's Base Realignment and Closure (BRAC) numbers from 2005, because the projections were from 2000. As a result, organizers mentioned the BRAC-related growth in the guidebook, to point out the huge impact that BRAC and the increase of jobs at the Aberdeen Proving Ground could have on the region.

Remember that the game is intended to raise awareness about the growth that is coming to a region and to establish that there is a need to think regionally about where and how the growth should be allocated. By design, *Reality Check* is a rough cut, a "10,000 foot level" exercise; the data that are produced are illustrative of the participants' priorities and values and are not intended to be used for precise, neighborhood-level analysis.

Lego® Blocks, Paper Chips, and Computer Programs

Each *Reality Check* must be matched with tools that will help participants best wrestle with the issues. Participants can use paper chips, Lego® blocks, or a computer software program to place growth on the map. Since the Los Angeles exercise, each *Reality Check* has used Lego® blocks to represent added jobs and housing units. Although Lego® blocks are attractive for their easy stacking, durability, and resemblance to buildings, paper or plastic chips might be a viable option depending on the goals and needs of the exercise.

Computer programs have been used successfully in several regional visioning efforts, such as in Sacramento Region Blueprint, but not yet for a *Reality Check* exercise. These programs offer an interactive element and more immediate results but are more expensive, since they must be designed for each exercise and region, and time consuming, since each version of the software must be tested and volunteers trained. The more detailed format of these programs may be more suitable for subregional or neighborhood-scale workshops.

Each paper chip in the Los Angeles *Reality Check* represented land uses at specific densities within a four-square mile area. At first, the participants were given chips representing current development densities and pretty quickly participants realized that the growth could not be accommodated on the map and they were then allowed to trade their chips for higher-density and mixed-use chips.

An important decision that must be made when designing the exercise is the increment of growth to be represented by each Lego® block or paper chip. It must be calibrated based on the scale of growth in the region and the size of the area covered by the game. The grid placed over the map does not correspond with the data but rather allows for the growth allocation to be put into the database.

Given growth projections of 2 million new residents and 1.6 million new jobs, each Lego® block for the Washington exercise represented the following:

- One yellow block represented 3,000 new households per square mile or four households per acre.

- One blue block stood for 6,000 new jobs per square mile or nine jobs per acre.

Each table then had to place all 280 yellow household blocks and 270 blue job blocks on the map.

Participants at the Vision North Texas exercise were given 1,169 blocks (604 orange blocks and 565 blue blocks) to place on the map:

- One orange block represented 25,000 households.
- One blue block stood for 4,000 jobs.

Blocks may be stacked to represent higher-density development patterns and mixed to symbolize mixed-use development.

TIP >> If affordable or workforce housing is an issue in the region, consider adding an additional Lego® or chip color to represent such housing. Tables in Maryland's *Reality Check Plus* exercise in the central region each received 250 housing blocks. One-fifth, or 50 blocks, were yellow, representing unsubsidized workforce housing valued at a price in the lower 20 percent of market housing prices.



How to Convey the Densities Associated with Each Block or Chip

It is important to help the participants understand what each block or chip represents. In Washington, D.C., for example, one yellow Lego® block represented 3,000 households or 7,200 new people per square mile. So at 2.4 people per household, one yellow residential Lego® block represented a density of approximately four households per acre; this resembles quarter-acre lots, typical of suburban development. Stacking Lego®s resulted in higher-density growth allocations; for example, a higher density would be three stacked Lego® blocks, which would be 12 dwelling units per acre, or townhouse-style development.




It is also important to point out that growth allocations are additive—the growth that is allocated by participants is in addition to what is already there. Vision North Texas prepared a detailed illustrated guide for participants. It included units per square mile and per acre, aerial images, and photographs, as well as examples to convey what each density would actually look like on the ground. ULI Washington and its partner instructed participants to add white Lego® blocks to represent existing density, so that participants could visualize the total amount of development that would be in place after the new growth was added. The allocations were as follows: one white block for existing low density, two white blocks for existing medium density, and three white blocks for existing high density.

Once densities are assigned to each Lego® block or chip, the data committee then creates a series of images that illustrate what one, two, three, or four Lego® blocks and combinations of blocks look like in real-world examples. The most effective way to illustrate the densities is to use regional examples. Aerial, street-level, and oblique views help convey the density. A challenge is how to show added density in relation to existing development.

Vision North Texas prepared a detailed illustrated guide for participants which included how many units per square mile and per acre each Lego® block represented, aerial images, and photographs to convey what each density would actually look like on the ground.

Vision North Texas *Understanding Our Options For Growth*

Range C • Jobs (non-residential)
11,500 - 19,000 • Jobs per Square Mile
18 - 30 • Jobs per Acre


Moderate Density Non-Residential
 Building Type: Medium-scale neighborhood retail centers and/or office complexes. Light industrial and/or institutional uses. Two- to three- story average.


Approximate Examples:
 Hall Office Park, Frisco



3 stacked LEGOs®

Mixed-Uses
 Street level commercial/retail with offices or residences above.





Trading of Blocks or Chips

In certain situations, it might be necessary to allow participants to trade in Lego® blocks or chips for higher- or lower-density options. In Los Angeles, each table was given an envelope containing the following paper chips:

- 782 low-density residential;
- 52 medium-density residential;
- 4 high-density residential;
- 9 office two-story;
- 1 office 10-story;
- 20³/₄ manufacturing/warehouse;
- 6³/₄ retail.

These allocations were based on the current land use trends in southern California—74 percent of the projected population would live in single-family homes, 20 percent in medium-density apartments and townhouses, and 6 percent in high-density housing. Jobs were divided in four categories representing different job allocations per acre. Organizers provided each table with a chip trading guide, and participants at each table were able to trade low-density chips for higher-density chips of the same land use.

Less complicated than the Los Angeles trading model is Maryland's Reality Check Plus model. Participants at each table could trade one white block for four low-density black blocks, which represented a significantly lower-density form of residential development.

The Map

A necessary tool for the exercise is a map of the region, which serves as the game board. The map needs to be professional in its appearance, with legible data layers, and cover a manageable area. It is important that the exercise map be free of jurisdictional boundaries so as to encourage participants to look at the region as a whole instead of focusing on their jurisdictions specifically. To best inform the participants, the map should contain the following elements:

- Shading to indicate existing population and employment density;
- Regional activity nodes, primarily on the basis of job and commercial activity within the region;
- Existing infrastructure, such as airports, local roads, highways, interstates, railroads, and local rail transit;
- Major environmental features, including bodies of water, floodplains, and protected lands;
- Publicly owned lands; and
- Names of towns, landmarks, and key resources, such as military installations, reservations, parks, etc.

The map should be color coded to show existing densities (typically, white is undeveloped, green is protected, and then a range of shades is used, from yellow for low density to red to dark brown for high density). To orient participants, include a legend with a north arrow, a scale, and a key to all the map's data layers. Several iterations of the map may need to be prepared to ensure that it conveys the necessary information in an easily understandable way.

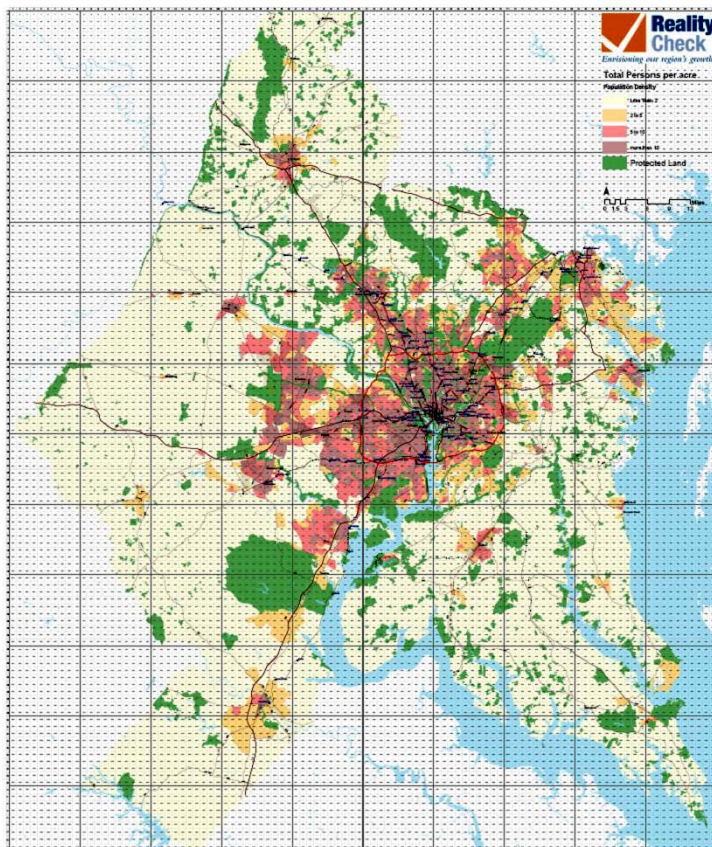
Organizers must carefully select the geographic boundaries of the region to be addressed in *Reality Check*, which in turn determines the area to be included in the map. Choosing the boundaries for the map can be challenging. Past *Reality Checks* have included all jurisdictions that are within the urbanized area of the region and the rural counties beyond that are in the path of future growth. Vision North Texas, for example, focused on the ten counties in the region believed to be the recipients of most of the new growth in the 25 to 30 years. Organizers then invited representatives from six outlying counties to be observers of the event. The commuter shed or other regional boundary might not coincide with the boundaries of the metropolitan planning organization or council of governments, and both might differ from the available data sets. In Washington, D.C., for example, the map was scaled so that each grid square represented one square mile, while the five-by-eight-foot Los Angeles

regional map included a grid of one-inch squares, each representing four square miles. The loss of detail in each square was required in order to fit the 20,000 square-mile area covered by the exercise onto the map—and the tables.

TIP >> Find out the size of the venue's tables before finalizing the map size, to ensure that the map will fit on the tables.

Organizers should decide how the participants at each table will be allowed to deal with growth on government-owned land, in jurisdictions that have legislation limiting growth in conservation areas or environmentally sensitive areas such as steep slopes or floodplains. In Los Angeles, organizers decided to indicate on the map those areas that were politically restricted from being developed, such as military bases and the agricultural preserves in Ventura County. The guidebook mentioned the growth management legislation in Ventura County, yet most tables doubled the density of the county anyway, in order to allocate all the growth. Mark any protected lands on the map, so that participants are aware of such restrictions.

The University of Maryland's National Center for Smart Growth was contracted to produce the map of the Washington, DC, metropolitan region.



Event Participants

The invitation list and table assignments are probably the most critical part of *Reality Check*. Develop the invitation list with a goal of having 200 to 300 participants, depending on the size of the region and the size of the venue. Participants must be carefully selected to create a diverse group representing the following stakeholders:

- Homebuilders;
- Environmentalists;
- Community leaders;
- Civic leaders;
- Affordable housing and social equity groups;
- Developers;
- Business leaders;
- Elected officials;
- Regional planners; and
- Media representatives.

Other stakeholders to consider are those representing the interests of seniors or the disabled, the faith-based community, and health care providers. While it is important that the invitation list closely represents the gender, racial, and geographic distributions of the region, it is not necessary for the ratios to be exact. Design the invitation list so that a broad range of perspectives is represented and a balance between viewpoints maintained. A rolling invitation process is necessary to ensure balanced stakeholder representation. It is important to find participants who will commit to the entire day.

LESSON LEARNED >> Do not share the invitation list with anyone beyond the committee. Any time that it is distributed to a committee for review, include instructions that it not be shared with anyone outside the committee. Maintain the final invitation list in a spreadsheet or database and keep track of RSVPs using this list.

To ensure a high rate of acceptance, organizers should commit to making personal calls to invitees to encourage them to attend the exercise. The Washington, D.C., *Reality Check* had a committee with six different stakeholders; they devoted six months to developing the invitation list. Although this seems like a long period of time for this task, the leaders were able to build trust and secure a diverse group of attendees. They established ground rules for how people could

recommend participants and there was an expectation that the committee leaders would make sure that their invitees showed up. Three weeks before the event, 300 people had committed to attend the morning exercise.

TIP >> The number of leaders on the invitee list should be larger than the intended number of participants. One way to keep track of this is to have an A list of all the people that the committee states must be invited. When an A list invitee cannot attend, then a B list invitee can be sent an invitation.

Table Assignments

The ideal number of participants at each table is eight to ten, with at least one developer at each table. Assign participants to tables with the goal of making heterogeneous tables with a broad spectrum of the community, including a range of geographic, racial, gender, age, and interest/sector perspectives. This diversity will help guarantee a realistic and balanced dialogue at each table.

TIP >> During the welcome and introductory speeches, the project manager should evaluate the balance and attendance at each table; this period can be used to make any needed additions to a table if there is a group of qualified observers from which to draw additional participants. Although a large number of observers should not be encouraged, staff, committee members, and representatives from other *Reality Check* efforts might be present as observers.

Invitations

The invitation is the face of *Reality Check* to the public and invitees. Many will have heard little about the exercise prior to receiving the invitation, so it is critical that the invitation make a professional first impression. The Los Angeles invitation gave invitees a charge in the first sentence of the letter, “On Thursday, October 10, 2002, you will be able to help determine the future of southern California.” Indeed, it is important to convey to invitees why they are being invited and why the exercise is happening. Include payment options, a cancellation policy, contact information, and lunch options.

In addition, the invitation should indicate that it is not transferable, so that only the person invited can attend, not his or her representative. Language to convey this might read “Your name has been carefully chosen to ensure a balanced composition of exercise participants; thus, this invitation is specifically for you and not transferable.”

Personnel

In addition to the leadership committee, the facilitators and computer operators/scribes enable the exercise to be played and summarized smoothly. At least one of the following will be assigned to each table.

Facilitators

The facilitators are typically skilled professionals familiar with the region and its planning and development trends. They need to have the ability to remain unbiased and have experience facilitating a small group of diverse participants. It is important to do a dry run of the game, so that the facilitators are familiar with the rules, the tools, the venue, and the regional growth issues. The facilitators are responsible for the following:

- Completing the exercise within the allotted time;
- Ensuring that each participant has an equal voice;
- Including everyone’s ideas and trying to reach consensus;
- Working cooperatively with the computer operator/scribe;
- Having a strong command of regional geography and growth issues; and
- Being prepared to answer questions about anything in the guidebook—sources of data, sources of software, organizers, and so on.

One of the main duties is to administer the rules and guidelines and encourage fair play. Facilitators break the ice, go over rules, and act as umpires. They lay out ground rules following the introductory speeches. Facilitators should be sure to let participants know that as they allocate growth, they should not focus on current trends or zoning but rather on how and where they wish to see growth go in the future. Their introduction should include an explanation of the map’s legend and mention that jurisdictional boundaries are intentionally not included. Facilitators should encourage participants to interact with the map. In the Los Angeles *Reality Check*, each participant marked his or her home and place of employment with colored dots on the map. The dots served as points of reference for participants and spurred conversation about regional issues, such as congestion. In addition, participants in the Los Angeles exercise documented areas of consensus directly on the map.

The facilitators should be instructed to not give out the chips or Lego® blocks right away but to focus the participants’ attention on discussing allocation strategies. When



The facilitator plays a key role in the *Reality Check* exercise.

the blocks or chips are distributed, it is advisable that they be spread around the map so that all participants have easy access to them. After giving everyone at their tables a chance to speak, the facilitators will ask those participants to agree on three or more guiding principles. The facilitators have the responsibility for ensuring that participants have fun, learn what is involved in using this process, and inform the team about their desires. Their job is to ensure that everyone has an opportunity to share his or her opinions as the table reaches consensus. The facilitator should intervene only when the participants are really stuck or reach an impasse. Without being obvious, the facilitator should encourage participants to think through the implications of where the chips or Lego® blocks are placed on the map.

TIP >> Create a facilitator script and detailed instructions, so that the facilitators are well prepared for their duty (see example in the appendices). Include a copy of the exercise agenda at the end of the instruction packet for easy reference.

“We decided we could do the most good, in terms of improving quality of life and livable cities, by focusing on emerging growth centers through transit-oriented development.”

—Group 7, Vision North Texas

TIP >> In the facilitators’ script, organizers might include a list of tasks for participants at each table to accomplish during the discussion and growth allocation. At the Vision North Texas exercise, for example, participants at each table were required to come up with a headline for their vision and select a representative to present the vision to the whole group.

TIP >> A good facilitator will encourage participants to move around their own table to see the map from all vantage points and will prevent “rogue” participants from placing Lego® blocks or chips that do not have the support of the whole group.

Computer Operators/Scribes

Computer operators are typically graduate students or young professionals (such as ULI Young Leaders) with an interest in planning or development. Although familiarity with spreadsheet and GIS technology is not required, it is beneficial. Each table’s computer operator must record his or her table’s results by attributing every Lego® block or chip to the grid on which it was placed. This information is typically entered into Excel or a similar software program and then e-mailed to the central computer analysis station.

Whereas facilitators and computer operators are a mandatory component of each *Reality Check*, scribes are not required. The Washington, D.C., *Reality Check* included both a scribe and a computer operator at each table, but this results in a crowded table and additional people to train. Maryland’s *Reality Check Plus* model consisted of a facilitator and computer operator and proved to be efficient. The computer operator serves as the scribe during the exercise: the facilitator writes the guiding principles and implications dialogue on a flipchart and the computer operator concurrently enters the text in a document file that is saved to a central computer. Upon the conclusion of the exercise, the facilitator then assists the operator with recording the table data.

A scribe, whether an additional volunteer or the computer operator, needs familiarity with the geography and development issues of the region. Throughout the exercise, the scribe captures some or all of the following:

- Issues of conflict;
- Issues of agreement;
- Odd or interesting statements;

- Level of cooperation or lack thereof among participants at the table;
- Level of understanding of regional issues or geography;
- Insights specific to the sector represented (business, civic, or elected official);
- General reactions concerning regional planning and cooperation;
- Implications of the vision—policies, public attitudes, infrastructure, etc.;
- Final notes concerning the value of the exercise and participants' willingness to support next steps.

TIP >> Secure five extra computer operators/scribes so that there are sufficient operators in case of illness, emergency, or no-shows. A list of computer operators should be developed at least two or three months prior to the exercise.

TIP >> Hold training sessions several weeks before the event and have a meeting of all computer operators/scribes on the day or evening before the exercise.

Equipment

In addition to a map for each table, other equipment is necessary:

- Markers or erasable crayons for recording guiding principles to allocate the projected growth and for delineating areas to be protected from development on the map;
- Easel and flipchart for capturing principles or implementation priorities, or writing a headline for the table's growth allocation patterns;
- Lego® blocks or paper chips to represent jobs and housing growth increments (see Lego® order form in the appendices);
- Dictionary or cheat sheet with visual images of density categories;
- Participant guidebook;
- Question flag;
- Name tags;
- Tables, chairs, table numbers and holders;
- Podium, microphones, and audiovisual equipment such as an LCD projector and screen for the speeches and presentations;
- Signage and banners.

TIP >> Consider preparing a laminated cheat sheet that describes the density represented by each color Lego® block or chip and includes a corresponding image of a project of that density so that participants can easily pass it around rather than flip through their guidebooks. This would help keep tables less cluttered.

Reality Check relies heavily on computer operators using spreadsheets and ArcMap, a GIS mapping software program, to capture the growth allocations created by the participants at each table. To support their efforts and the work of the team analyzing the data and swiftly developing a summary presentation, a large supply of computers and software programs is needed. The computers will serve multiple purposes and must be connected by a network so that each operator can save products directly to the network. A team of students or professionals with a strong knowledge of GIS and spreadsheet software will then retrieve the results from each table at a central command point that has several laptops and printers. The team will tabulate and compare the results in preparation for the afternoon presentation of the exercise findings. They will print the results and any talking points for the afternoon session.

This equipment will be an expensive part of the *Reality Check* budget, so investigate the possibility of borrowing the computers or getting a computer company to donate their use. If this is not a possibility, computers, printers, and network equipment can be rented. Ask the university or entity responsible for computer operations and data analysis during the exercise for a list of specifications for all computer equipment required. This list should include the equipment needed for each table, backup equipment, all necessary networking equipment, all software, and any support or analytical equipment. The licensing of software is a key issue and the responsible institution needs to provide the District Council with a letter verifying that a sufficient number of licenses are available for use at the exercise. The equipment needs to be set up and tested prior to each simulation and also the night before the exercise.



St. Mary's College kindly offered the use of their gymnasium for the Southern region's event as part of *Reality Check Plus* (photograph above).

(SOURCE: © PAUL COELUS, WATERFORD, INC. 2006).

The Eastern Shore *Reality Check Plus* event was held at a local hotel (photograph below).

(SOURCE: © JACK LYNN, LLC 2006).



Venue

The venue can be one of the most expensive items in the *Reality Check* budget, so choosing the best venue is an important part of the planning process. When visiting potential sites, take note of the room that would best suit the exercise and how participants would flow between the game room, the lunch site, and the space where the afternoon session would take place (either in the game room or an auditorium). When selecting a venue, consider the answers to the following questions:

- Is it conveniently accessible by both automobile, with parking available, and public transit?
- Does the venue have state-of-the-art technological equipment on site or will it have to be rented?
- Is the space large enough to hold the expected number of participants?

Because of the expense, consider having the venue donated or greatly discounted by a sponsor or partnering organization, such as a university. The Vision North Texas exercise took place at the Hereford University Center at the University of Texas at Arlington, and thus was hosted by one of the organizers at little or no cost. The University of Southern California provided a venue for the Los Angeles' *Reality Check* on Growth for a minimal cost. Although the partnering organizers did have to rent tables and chairs totaling \$1,000, which might have been included in the rental fee for a convention center, the small cost of the venue itself provided huge savings. ULI Washington, by contrast, found that the rental of the Ronald Reagan Building in downtown Washington, D.C., and the associated catering costs were the largest portion of the budget, at \$30,000. The additional cost was worth it to the *Reality Check* Washington organizers, because the venue was conveniently located and had large, well-appointed rooms that allowed easy movement between them.

Catering is also an important item to investigate when selecting a venue. The budget might allow for a sit-down catered meal, such as the lunch at *Reality Check* Washington, or a lunchbox with gourmet sandwiches, similar to that handed out in Los Angeles, which cost approximately \$15,000.

LESSON LEARNED >> The Vision North Texas venue could not fit all the tables in one large space. Keep size in mind when looking at both rented and donated venue options. The *Reality Check* exercise is most effective if all participants are in the same large room, where they can observe and be energized by each other; one room also makes it easier to address the group and give instructions.

Speakers

Programs for the day of the *Reality Check* exercises have varied, but all have included a variety of speakers. The chair or cochairs of the event should welcome participants in the morning. Next, an opening speaker should establish a regional context for the exercise, including the existing conditions and forecasts for growth, as well as give the group the charge for the day. This portion of the program should give the participants a sense of where things are going if growth continues at its current pace and pattern and a charge to see whether they can assign growth in such a way as to better preserve the quality of life and economic vitality in the region. While this presentation can include some numbers, it should not be too technical but should keep the audience engaged and generate excitement about the challenging game ahead. This should be followed with a straightforward presentation of the ground rules and objectives of the exercise. The most important ground rule for this speaker to convey is that the growth projections are not negotiable. This section should be kept short since it is likely the participants will arrive eager to begin the allocation exercise. If possible, the introductory and welcoming portion of the program should be approximately 30 minutes long.

Speakers, from introductory remarks to keynote addresses, are an important part of *Reality Check* exercises and should be chosen with care.



A *Reality Check* program typically includes a keynote speaker either during lunchtime or to begin the afternoon session. Including a keynote speaker is an effective way to share the message of regional visioning or other key regional themes that will inspire participants to seek change in their communities. Spend time at the committee and subcommittee levels soliciting and vetting suggested names. A speaker with a national name will encourage participants to stay through the afternoon and will attract more afternoon attendees. Vision North Texas, for example, asked Shelley Poticha, president of Reconnecting America, to give the address. Robert Grow, founder and chairman emeritus of Envision Utah, spoke at *Reality Check* Washington. Ed McMahon, ULI Senior Resident Fellow, gave the keynote address for two of the Maryland *Reality Check* Plus events. Typically a *Reality Check* organizer will introduce the keynote speaker, who will speak for approximately 25–45 minutes and then field questions from the audience.



Another speaker will be needed to present the general findings and overall themes, summarizing the tables' growth allocations. During the afternoon session of *Reality Check* Washington, a speaker presented a computer image of each table's housing and job allocations and drew from them overall trends about how participants wanted to see growth allocated across the region. In Los Angeles, the networking lunch was followed by a panel discussion, preliminary exercise results, and a postexercise survey. The afternoon session for Vision North Texas lasted approximately two hours, followed by a networking reception, and included a summary report from the morning exercise, implications from the growth scenarios, design issues and priorities, and a large group discussion. The afternoon session also used keypad polling techniques to get immediate feedback from participants.

TIP >> No matter who summarizes the results of the morning exercise, it is important for the presentation to be informative but not too technical. Speakers during the afternoon session must be engaging, to keep the attention of the audience. If the summary presentation includes maps, be sure that they clearly differentiate the changes from forecast trends that participants proposed. These presentations should not be too data intensive but should pull out the telling anecdotes, shared values, and priorities and policy implications of the participants' work.

J. Ronald Terwilliger, a ULI Trustee and strong supporter of smart growth and workforce housing, gave the welcome address at Vision North Texas.

Guiding Principles

The guiding principles are an important part of the *Reality Check* exercise because they help the participants at a table form consensus on how and where they want the region to grow. Once formed, the principles should guide all the growth allocations at the table. Examples of guiding principles from Washington, D.C.'s *Reality Check* include the following:

- Preserve and protect natural areas, green spaces, and waterways;
- Create a better balance of jobs and housing throughout the region;
- Focus development near transit stations;
- Concentrate development along existing transit corridors;
- Encourage more mixed-use development;
- Provide more housing choices.

The data analysis team is responsible for reviewing the principles and growth allocations produced by the participants at each table.

(SOURCE: © PAUL COELUS, WATERFORD, INC. 2006).

Developing the set of guiding principles is one of the most important aspects of *Reality Check*. Participants are often surprised at how much consensus exists on broad goals for

the region, despite the diversity of the participants at the table. That “aha” moment is multiplied as participants later learn how similar the principles developed at other tables are to their own. Good facilitators will help make participants feel comfortable sharing their opinions. Facilitators must insist that all views are considered equal and that consensus is reached before principles are adopted.

TIP >> When soliciting guiding principles, the facilitator might follow the strategy of going around the table and asking each participant to offer a principle. These can then be discussed and refined in order to reach consensus.

Entering Growth Allocation Results Following Exercise

After the results are fed into an Excel spreadsheet, they are saved to a central computer or network as a database file. The computer operator then closely follows instructions to create two- or three-dimensional maps of the jobs and housing allocations using ArcGIS software. GIS maps are typically used because they can be easily analyzed by the technical team and effectively presented to the participants.

The resulting maps are then displayed to the participants to show similarities and differences among the tables during a presentation of the game's results. For example, the presentation might highlight which tables placed the most or fewest jobs or households in the following patterns:

- Close to transit or other transportation facilities;
- Inside the perimeter highway or beltway, if one exists;
- Inside the region's urban envelope;
- Most or least concentrated development pattern.

When the game ends and the participants have left for lunch, the computer operator and scribe or facilitator can begin the process of entering data from the map into a spreadsheet. Typically, there is a two-hour period in which the counting, data analysis, and PowerPoint presentation must be completed. Operators and facilitators or scribes are typically given 30 minutes to enter the data on the Excel spreadsheet and to save it on the server and approximately 15 minutes to output the four maps. Given the pressure of completing complex tasks in such a short period of time, only competent staff (most likely university staff and students) should be in charge of these tasks. In Los Angeles, students and staff from the USC GIS Research Laboratory analyzed the data and reported to participants on the growth



scenarios laid out on the maps at the tables. Washington's *Reality Check* benefited from the expertise of two institutions, the University of Maryland's National Center for Smart Growth and Virginia Tech's Metropolitan Institute.

Although the Los Angeles paper chip model followed a slightly different data analysis process, the three subsequent *Reality Checks* that have used Lego® blocks have all followed a similar series of steps to analyze the maps. The Lego®-counting process consists of the facilitator or scribe removing Lego® blocks from the map and reading the associated grid numbers and count of each color of block to the operator. A formatted spreadsheet on each computer has all the fields ready to be filled in. Operators enter information only into the fields corresponding to the color of the Lego® blocks. After all the blocks have been removed from the table, the facilitator is free of duties, but the computer operator is just beginning the task of creating two- and three-dimensional representations of the tables' growth allocation. The spreadsheet is saved to a central computer or server. The next steps will vary depending on the computer program and design of the exercise.

TIP >> When designing the spreadsheet, make it easier for the operator to enter information accurately by shading the housing column the same color as the housing blocks and doing the same for the jobs column and blocks.

TIP >> Lock all other fields on the spreadsheet to prevent accidental entries.

Typically, the operator exports the spreadsheet to database format in Excel (detailed instructions can be found in the appendices). The database is then used to create four maps—two two-dimensional maps and two three-dimensional maps—of the growth allocations. First, the operator applies the data to an existing two-dimensional regional map and creates a two-dimensional map for new growth in jobs and another for new growth in residents, using ArcMap. The operator then joins the data sets with a three-dimensional base map. All four maps are saved to the central computer or server, so that the members of the data analysis team can begin their rapid review of the data. Table numbers are included in the titles used to save the data and maps, so that it is clear which documents are associated with which table.

The data analysis team is responsible for reviewing the principles and growth allocations produced by the participants at each table. The team studies the list of principles supplied from each table and identifies those most consistently mentioned by all participants. This information should be presented to the audience in the afternoon session. The data analysis team also reviews the maps in several ways. The most effective strategies include the following: form a composite or average of all scenarios; identify maps with the least and most compact development to show the range of scenarios; identify common themes such as satellite cities, infill along transportation corridors, etc.; and create three-dimensional maps to make the results easier to understand for the audience.

Another effective way to analyze the resulting scenarios is to develop (before the exercise) a group of indicators that can be quickly assessed by the computer and determine how the scenarios measure up to the indicators and the base case scenario. Examples of indicators include the jobs/housing balance, density near transportation corridors or stations, and density allocated to downtown areas or regional activity centers. Postevent analysis will present the findings in greater detail and from more perspectives.

Afternoon Session

It is important that participants are kept engaged during the afternoon session so that they leave the event with the feeling that *Reality Check* will make a difference in their communities. The media should be invited to this session also, so that they can report on the results of the exercise. The results and analysis of the exercise can be further augmented by an interactive discussion or a presentation on the barriers, the next steps, and the regional visioning implementation. At the afternoon session during the Eastern Shore event of *Reality Check Plus* in Maryland, everyone returned to their tables after lunch instead of to an auditorium. This was important because they reconnected with their teammates for some collaborative discussions. This approach might not work in regions that have a large audience attending only the afternoon session. Many variations could work very effectively, but it is strongly recommended that implementation be a topic of the afternoon's speakers.

It is also possible to develop a system for generating feedback on the exercise through a survey or questionnaire. It is worthwhile to gauge participants' interest in getting involved

with *Reality Check* during the implementation phase. Several *Reality Checks*, including those in Washington and Maryland, have used surveys. Speakers might have to remind participants several times to fill out and hand in their survey forms. ULI Los Angeles handed out two surveys—one when participants arrived, asking them what they expected to achieve that day and how they felt about growth issues in the region, and a second at the conclusion of the exercise, asking similar questions. The results from the two surveys showed the positive impact of the exercise: many participants' shifted their opinions on certain topics, such as clustering, transit, and density. Another effective tool for determining support for the exercise's results is keypad polling, which was used successfully in Vision North Texas.

The afternoon is most engaging when it includes an interactive session, so this session might be something more than a discussion panel, a way to truly engage the participants. Vision North Texas, for instance, included presentations by participants in its afternoon session. To share the findings from the morning exercise, a representative from each table presented a group headline summarizing their growth scenario while a photograph of their Lego® distribution was shown on a projector next to an image of the base case scenario. At the Los Angeles event, participants at each table selected a spokesperson to present their main goals or problems to the other workshop participants—five or six such presentations were made.

Keypad polling, used successfully at Vision North Texas, is an effective tool for determining support for the exercise's results.



How Much Does *Reality Check* Cost?

Reality Check can be an expensive endeavor and requires significant human and financial resources. The cost can vary between \$80,000 and \$300,000, depending on the value of in-kind contributions, staff availability, venue costs, and the amount of implementation activity included in the budget. (Sample budgets can be found in the appendices.)

Funding the Program

Funds, sponsorships, and in-kind contributions can be sought from a variety of sources. Contact foundations, non-profit organizations, private organizations, chambers of commerce, trade organizations, universities, and civic groups for sponsorship or grant opportunities.

Early in the planning process, organizers need to decide whether they will be seeking government funds. In past *Reality Checks*, organizers have shied away from public funds because they did not want the program to be seen as another government planning program. As a result, the typical *Reality Check* has been funded by private and nonprofit funds; however, there have been instances of significant local government involvement. The NCTCOG provided substantial staff and data support for the Vision North Texas event and has since gone to its member local governments with a vol-

untary assessment program to raise funds for phase 2 of the ongoing effort. In *Reality Check Plus*, the Maryland state planning agency made an in-kind contribution of data and expertise. Envision Utah successfully engaged the state of Utah as a major funding partner in its efforts.

Foundations are also a coveted source of funds. Foundations such as the Fannie Mae Foundation have funded *Reality Check* efforts in the past and can often bring credibility to a visioning effort. As always, when checking with foundations, it is important to make a request that complements the mission of the foundation. For example, many foundations today are interested in social equity issues and thus might be interested in providing a grant to contribute to registration fees to ensure a diverse group of participants.

Major Expenses

Expenses vary according to the programming specifics and in-kind contributions received for each *Reality Check* program. In the first three *Reality Checks*, there were a range of direct expenses. The Los Angeles event cost \$90,000, the north Texas event totaled \$86,000, and the Washington event \$190,000 in direct expenses. The cost of *Reality Check* approaches \$200,000 to \$300,000 when considering all expenses. Depending on the design of the exercise, the venue and catering are often the biggest expenses. The hiring of a project manager can also be a large expense. In Los Angeles, the major expenses were GIS mapping services (\$24,500), purchase of the data (\$5,000), the data analysis program, printings, mailings, and production of the *Reality Check* video. ULI staff members and volunteers staffed the event. Los Angeles mounted a major fundraising effort to assemble the \$90,000 needed to stage the event. This total includes hard costs

but does not include the in-kind contributions and staff hours from the partner and sponsoring organizations.

Reality Check Washington's largest expenses were the venue and catering fee (\$71,000), the use of the Smart Growth Alliance's staff (\$20,000), paid consultants to write the guidebook and the final report, printing costs, mailing costs, and video production. In fact, the largest part of the Washington, D.C., budget covered the cost of a software contract for a computer program that would have enabled participants to see where they were placing growth on a more detailed digital map. The software program was ultimately set aside in favor of Lego® blocks. The customization of the software program resulted in the Washington District Council losing money on the exercise. While *Reality Check* is not intended as a revenue-generating program for District Councils, the hope is that the effort will break even or result in a small profit.

The largest costs associated with the Vision North Texas exercise included hiring a project manager (\$60,000), event expenses for the venue, catering, and other items (\$18,000), and materials, printing, and mailing (\$8,000). The organizers were fortunate enough to receive substantial in-kind contributions from the COG and the University of Texas, such as a donated venue, which are not included in these totals.

LESSON LEARNED >> Contracts for staff and services are increasingly necessary to put on a *Reality Check*. As a result, ULI is entering into contracts with universities, councils of governments, private individuals, and companies. It is important to note that ULI does not pay more than 15 percent of overhead expenses for contractors. In addition, ULI should, if possible, act as the sole fiscal agent since it is problematic to divide funds into more than one account.

Revenue Sources: Registration

The main sources of revenues are registration and sponsorships. The Los Angeles organizers charged different amounts for nonprofit and for-profit participants—\$150 and \$300, respectively. Others have offered a larger discount to encourage nonprofit attendance; for example, Washington's *Reality Check* charged the following:

- \$35 for nonprofit and public sector participants;
- \$295 for private sector participants;
- \$35 for the afternoon session only;
- \$100 to attend the networking luncheon and the afternoon results presentation.

The Washington, D.C., event generated \$35,250 in registration fees. Tiered registration fees and scholarships help ensure regional equity, so that everyone who is invited has the funds to attend the exercise. Foundations could be a good source of funding to ensure that this happens. ULI Los Angeles offered maps of the region for sale, which generated approximately \$1,700 in revenue.

TIP >> While not a direct source of revenue for *Reality Check*, ULI District Councils should staff a table at the event with information about ULI membership and books for sale.

Revenue Sources: Sponsorships & In-Kind Contributions

District Councils can recapture some of the expenses of *Reality Check* through sponsorships. They have proven to be a critical part of fundraising for a *Reality Check*. The organizers of the Washington, D.C., exercise raised \$158,000 in sponsorship revenue, while those in Los Angeles received sponsorships totaling \$130,000. Potential funders of *Reality Check* typically include the following entities:

- ULI District Council;
- Council of governments or other regional entity;
- University partner;
- Business partners;
- Trade organizations; and
- Nonprofit organizations and foundations, namely representatives from local and regional environmental, conservation, social equity, or citizen advocacy groups.

It is also important to involve and solicit funds from firms that are key players in the region's economy, such as health care providers and other large businesses. Evaluate what benefits and exposure a company or organization gets in return for contributing funds. Major sponsors should be represented on the steering committee and given appropriate publicity on the web site and at the exercise, while smaller contributions should be highlighted in the participant guidebook and final report. All levels of funding, both large and small and both cash and in-kind contributions, are important. A small contribution from a key local organization could help generate larger donations because it shows broad support for *Reality Check*.

Given the many components in a *Reality Check*, sponsorship opportunities abound. Sponsorships should be sought creatively; for example, an architecture firm might be able to print draft or final maps or call on their printing contractor as an in-kind contribution. The GIS and mapping software company ESRI donated the ArcMap software needed for the Washington *Reality Check*. The video could be an item offered for sponsorship, with the sponsor receiving publicity in the film (but no editing power).

Sponsorships can also be linked directly with specific events or portions of the program. The Los Angeles *Reality Check* offered only five sponsorship opportunities at the “Benefactor” level (\$7,500), thereby making this level more desirable and of greater benefit to the sponsor. The five program elements that could be sponsored included the following:

- Breakfast;
- Keynote presenter;
- Lunch;

Afternoon session;
Networking reception.

Each sponsor got a chance to make podium remarks. Also they received three complimentary registrations, signage, and listing in materials, including the final report. “Category killer” sponsorships can be offered for high-value donors so that only one law firm, bank, or engineering firm, for example, will receive sponsorship recognition at a given level of donation. Vision North Texas offered a variety of sponsorship levels, including gold, silver, and bronze sponsorships as well as opportunities to sponsor breakfast, lunch, the reception, tables, and hotel suites. Sponsors included banks, development companies, professional associations, and planning consultants.

TIP >> Be creative as sponsorship opportunities arise. Ensure that options give organizations and companies the chance to gain some visibility at the event.

Organizers must personally present *Reality Check* to business organizations, professional organizations, and civic organizations to generate understanding and excitement for the event and also to solicit funds. As with all effective solicitations, it is important to provide background materials, such as a brochure, and to follow up. Leverage interest from one company to seek funds from several others. If a company is interested in learning more about the process and about how it might be able to contribute, see if that company might invite several others to come to a meeting where *Reality Check* will be presented. See if one company can come to the meeting with a contribution to put on the table.

TIP >> To recognize the sponsors, consider rotating their logos on a projection screen as a backdrop prior to the beginning of the morning session.

TIP >> To offset the cost of printing draft and final maps, an architecture firm might be able to do some printing or use their printing contractor at a discount.



It is important that sponsors receive recognition at the *Reality Check* event.

What Happens after *Reality Check*?

“Planning tends to try to find a single outcome. Scenario planning and visioning looks at alternative choices and picks robust strategies for your future that, hopefully, cross multiple scenarios, but lead toward the ones you want the most.”

—Robert Grow, Founder and Chairman Emeritus of Envision Utah

Implementation Strategies

When the exercise is over, *Reality Check* is far from finished; in fact, it is just beginning. *Reality Check* provides the momentum to begin the implementation conversation about how to enact change on a regional scale. The implementation strategy is a critical component of any *Reality Check*. It can include a series of programs, workshops, technical assistance, toolkits, and a communications strategy to address barriers to and opportunities for achieving the vision articulated at the *Reality Check* exercise. It could also include a series of additional workshops, held on a regional or subregional scale, that lead to the development of a preferred growth scenario. A region should do *Reality Check* only if it is willing to use the energy and support generated from the event to move forward with implementation.

Consider the following key strategies when creating an implementation strategy:

- Start planning early.
- Commit at least two years to the implementation phase, so that it can get traction and optimize its impact.
- Raise implementation funds while raising funds for the exercise.
- Use *Reality Check* as a framework for everything the District Council does. Tie *Reality Check* themes and findings, such as the link between land use and transportation, infrastructure, and higher-density development, into other programming efforts.
- Consider holding subregional workshops to broaden the buy-in to the process.
- Develop and share tools, best practices, and education programs that address key issues or barriers identified in the *Reality Check* process.
- Offer technical assistance to local jurisdictions with projects that complement the *Reality Check* recommendations, including through ULI Advisory Service Panels and Technical Assistance Panels (TAPs).

- To develop *Reality Check* into a full-scale visioning initiative, integrate into other regional efforts or partner with other organizations.
- Work with a variety of partners—each can bring different assets to the process. For example, some can lobby and advocate on issues, while ULI cannot; councils of government have access to transportation models and other analytic tools; and universities can provide relatively inexpensive research resources and policy analysis.
- Tie *Reality Check* results into long-range regional planning and investment strategies. For example, the “2 percent strategy” in Los Angeles is now formally adopted as an element of SCAG’s federal transportation fund allocation formula.
- Do not take on the hardest issues first. Look for some early implementation wins.
- Continue to keep the media engaged in the dialogue about the region’s growth. Encourage editorials or articles on the subject of growth, organize editorial roundtables, and continue to give presentations to newspapers and local radio and television stations.
- Engage politicians in the dialogue, especially candidates in upcoming elections.
- Involve state, regional, and local planning agencies in the findings and next steps to keep them involved in the process.

There are several models for how a *Reality Check* implementation strategy is carried out:

- District Council led;
- Creation of a partnership between ULI District Council and other organization;
- Smart Growth Alliance or other coalition led; or
- Creation of a new entity that might be similar to Envision Utah.

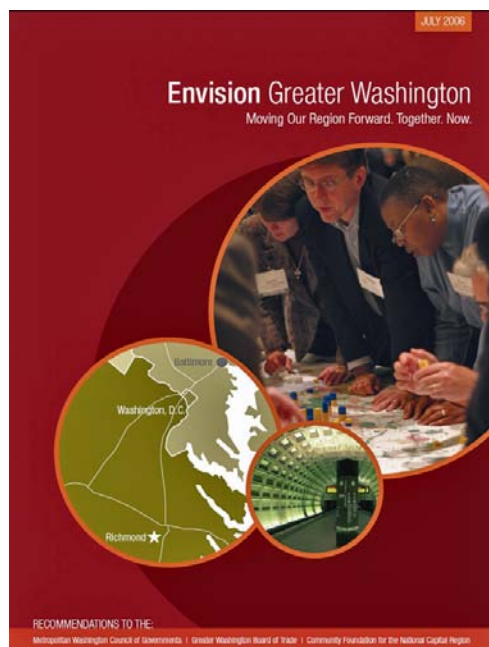
A smart growth alliance, created with the ULI District Council as a leading partner, could provide an ongoing institutional framework for the implementation efforts. The Washington Smart Growth Alliance, for example, continues to play a leading role in ULI Washington's *Reality Check* implementation, and ULI Seattle is creating a Smart Growth Alliance to lead its *Reality Check* implementation efforts. An alternative is for a separate entity to be created to focus on the implementation efforts. ULI Washington and the Smart Growth Alliance have spent 18 months investigating the creation of such an organization. To be known as Envision Greater Washington, this organization will be created if sufficient private sector support and funding can be found. Initially, its effort would last about four years and cost approximately \$1.5 million per year. A third option is to partner with a council of governments or metropolitan planning organization that takes the lead in funding an ongoing visioning effort, such as ULI Los Angeles's partnership with SCAG and ULI North Texas's partnership with the NCTCOG.

An implementation strategy works best if it aims to leverage leadership, educate the community, improve regional cooperation, and create a system to measure progress. One pos-

sible strategy to build consensus on a vision for the future might include this multistep process: Immediately after the event, consider undertaking a buildout analysis to attempt to answer questions about current growth trends, current zoning, and alternative growth scenarios. Then share the buildout analysis products with the community at workshops and in a final report. Next, gain support for a shared vision by holding workshops at which the public can vote or share input on various growth scenarios. Then broaden support for the shared principles generated at the *Reality Check* event through postexercise briefings that present *Reality Check* results and hold discussions about next steps. A public information campaign to gauge future support for efforts in the following years will also be necessary.

During the implementation phase, ULI should adopt a role that plays to the Institute's core strengths, convening stakeholders and providing best practices recommendations rather than engaging in direct advocacy. ULI Los Angeles and its partners held 22 subregional workshops during which they looked at the growth issues on a smaller scale. Because this requires substantial funds and resources, it may be necessary for ULI to hand the baton to another organization to lead this phase. Another approach would be to continue the regional dialogue, moving from "where should we grow?" to "how should we grow?" through workshops that examine different development types and land use patterns on a neighborhood scale.

In a July 2006 report, Washington Smart Growth Alliance and partners recommended the creation of a new entity—Envision Greater Washington—to the Metropolitan Washington Council of Governments, Greater Washington Board of Trade, and the Community Foundation for the National Capital Region.



TIP >> When implementing the recommendations from *Reality Check* with partner organizations, all parties should agree that they will share all written products and distribute them only if the other partners approve them.

Many public policy tools can be incorporated into the implementation strategy, including model zoning codes, such as form-based codes, infill incentives, affordable housing policies, growth management laws, public/private partnership strategies, transit-oriented development practices, tax increment financing, infrastructure investment priorities, green building policies, smart growth scorecards, and historic preservation tax credits. District Councils can also create outreach programs after *Reality Check* to educate elected officials on the region's growth issues. For example, the District Council could create a lexicon, visual library, or toolkit to help communities better envision future developments.

Smart Growth Scorecards

The U.S. Environmental Protection Agency has compiled a set of smart growth scorecards and rating systems currently being used in communities across the country. These tools help communities choose the best policies and strategies to ensure that growth and development benefits everyone. Some scorecards help communities understand how the local regulatory climate affects development patterns. Others are designed to determine whether proposed new developments meet community-defined smart growth goals.

<http://www.epa.gov/smartgrowth/scorecards/index.htm>

Smart Growth Recognition Program

In 2002 the Washington Smart Growth Alliance created a Smart Growth Recognition Program to help planned projects that meet a set of smart growth criteria get approved, by informing regulators, public officials, citizen groups, developers, and others of the benefits these projects would bring to a community and the region. The program has been well received because many developers in the region recognize that they face a major challenge in gaining the necessary approvals for projects. The Recognition Program is not an award; instead it results in a letter of recognition that the developer can use to gain community and planning support for projects during the entitlement process. Applications are reviewed quarterly by a jury consisting of members from the five founding organizations as well as at-large jurors with specific project expertise. So far, the jury has recognized more than 36 projects in the Washington, D.C., metropolitan region. A similar recognition program has been developed by the Delaware Valley Smart Growth Alliance in the Greater Philadelphia tristate region.

<http://www.sgalliance.org/sgrp.html>

<http://delawarevalleysmartgrowth.org/>

Envision Utah Quality Growth Awards

Envision Utah began its Quality Growth Awards program in 2001 to recognize efforts to implement quality growth strategies that are in keeping with the 2000 Quality Growth Strategy. Several awards are granted each year and serve as concrete examples that developers and locally elected officials can learn from. As part of the awards ceremony, a large newspaper advertisement is placed in each of the region's four major daily newspapers.

<http://www.envisionutah.org/qgawards.phtml>

Vision North Texas: Celebrating Leadership in Development Excellence (CLIDE) Awards

The NCTCOG Center of Development Excellence established the CLIDE Awards in 2003 to celebrate regional excellence. This existing program has been folded into the Vision North Texas efforts. Each year the NCTCOG honors individuals and entities that have begun to address the region's future sustainability in their projects. Leadership Awards are given to projects that exemplify one or more of the NCTCOG's 10 Principles of Development Excellence and serve as examples of quality development practices in north central Texas. From those projects, the jury unanimously selects three projects for the highest honor, the Landmark Award.

<http://www.developmentexcellence.com/awards/background.asp>

A well-edited and engaging video of the *Reality Check* event can help spur interest and funding for the implementation phase, especially if the exercise was results oriented. Washington, D.C.'s *Reality Check* film, for example, helped to sell the *Reality Check* brand for a cost of only \$8,000. It is good to investigate getting the rights to the footage so that the video could be used for a more in-depth cable television program in the future. In addition, the web site for Washington's *Reality Check* continues to be important during the implementation phase. Browsers can learn about *Reality Check* and see what has been accomplished to date, what the next steps are, how to get

involved, and how to donate funds to the effort. Keep the Web site up to date and include a section with announcements, media coverage of growth issues, and items for downloading. Vision North Texas's web site, for example, includes all the PowerPoint presentations from the day of the exercise, so that browsers can understand the process and follow the progress of the effort.

TIP >> When developing the implementation strategy, consider how the strategy's success will be measured.

Integrating Land Use and Transportation

Integration of land use and transportation decision making is one key visioning implementation focus. For example, Envision Utah entered into an innovative demonstration project with the Federal Highway Administration to consider corridor transportation needs in an integrated, multimodal way—and convinced mayors along the corridor to sign compacts committing their communities to support the land uses compatible with the proposed transportation infrastructure investment.

Reality Check Implementation Models

Just as no two *Reality Check* exercises are alike, neither are the implementation strategies adopted by District Councils and their partners. Below are brief summaries of the four models adopted by the Los Angeles, Washington, North Texas, and Baltimore District Councils.

***Reality Check* on Growth—Los Angeles**

In Los Angeles, where the *Reality Check* program was developed, the District Council and its partners held a series of subregional workshops following the exercise to further refine the strategy for the region's future growth. As a result of these workshops and building on SCAG's multiyear, multiregion "Compass" visioning process, in which ULI Los Angeles provided key private sector involvement, ULI Los Angeles and its partners developed the "2 percent strategy." The strategy centers on the finding that although increased densities are essential, it is not necessary to increase density everywhere. In fact, it would be possible to add all the projected growth around key transportation nodes, resulting in higher densities on only 2 percent of the region's land. Achieving these target densities would more than double air quality and congestion

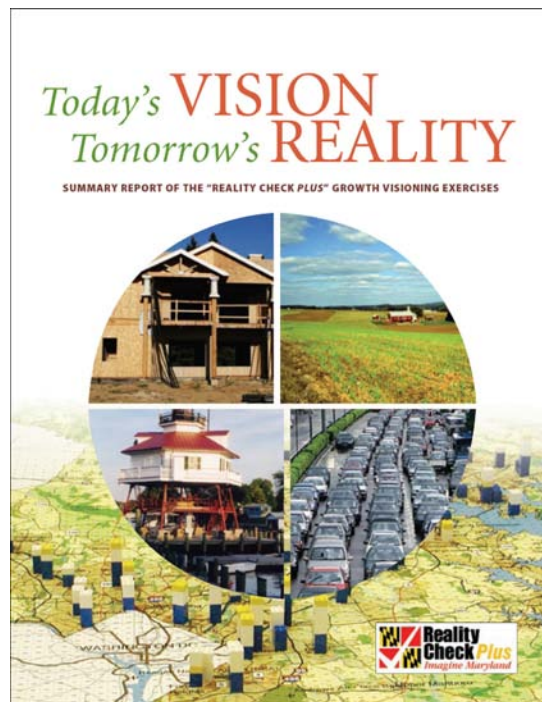
mitigation benefits, compared with current plans. The 2 percent strategy is giving municipal and private sector leaders an understanding of these key opportunities and new tools to help them be successful.

Three years after *Reality Check*, ULI Los Angeles leadership is very proud of the results to date and is still involved in SCAG's Compass efforts. The 2 percent strategy is emerging as a model for sustainable urban design. SCAG has developed a toolkit to assist local governments in implementing the strategy and offers a wide variety of free consulting services to cities and counties in the region. They include infill analysis and development strategies in 2 percent areas, development code analysis, urban design solutions, public involvement, and photorealistic visualizations. The services are flexible and are tailored to the needs of the specific jurisdiction. The consulting services are offered through the spring of 2007, and recipients are selected on the basis of how well the proposed projects meet four Compass principles. Los Angeles' *Reality Check* on Growth has proven to be an effective case study of how to educate regional leaders about the effectiveness of regional visioning.

Reality Check Washington

Implementation efforts for the Washington *Reality Check* have focused on engaging the broader business community, primarily through the region's Board of Trade. ULI Washington, with the Washington Smart Growth Alliance and other partners, is investigating the creation of an entity ("Envision Greater Washington") based on the Envision Utah model. It would last three years and be a \$3–5 million effort. ULI Washington has stepped aside to some degree, so the effort is viewed as a separate entity led by the Washington Board of Trade and the Smart Growth Alliance.

ULI Washington has also provided technical assistance to local governments seeking to implement the *Reality Check* principles on topics such as the reuse of underused suburban strip shopping centers and redevelopment along key transportation corridors through its Technical Assistance Panels (TAPs) program. ULI Washington has positioned all of its programs since *Reality Check* relative to the growth and implementation issues that arose as a result of the exercise. Thus, *Reality Check* has become the context for all programming at the District Council level.



Maryland's *Reality Check Plus* final report *Today's Vision, Tomorrow's Reality* was released at a statewide media event in September 2006.

The exercise has also resulted in important recommendations for regional cooperation in a region containing parts of two states, the District of Columbia, and many local jurisdictions. Immediately following the exercise, organizers shared the results at briefings for the Metropolitan Washington COG, city and county councils, and planning commissions. One recommendation was that all jurisdictions adopt a common GIS platform—something simple that one might assume would be in place but, with several jurisdictions, is not as easy to achieve as one might expect.

Vision North Texas

Vision North Texas divided its *Reality Check* planning efforts into two phases: Phase I included the planning and holding of the visioning exercise; Phase II consists of the implementation effort. Phase II has been developed on the basis of feedback from workshop participants and will focus on four initiatives in education and outreach, involvement, research, and policy decisions:

- Education of elected officials, developers, and others;
- Expanded involvement of the public throughout the region;
- Completion of key research and design projects;
- Consideration of the need to adopt a preferred scenario to use in making regional investment decisions.

Vision North Texas will continue as a public/private partnership through 2007. Phase II is directed by a management committee and a 36-member advisory committee reflecting the region's diverse interests, and its project manager will continue to lead the efforts. Recently, ULI and the NCTCOG entered into a partnership agreement to support the implementation efforts. The COG has raised \$150,000 in a voluntary assessment from its members. In October 2005, the ULI Foundation awarded ULI North Texas a Community Action Grant (www.actiongrants.uli.org) to develop a toolkit of implementation strategies and workshops to engage targeted groups of stakeholders and regional leaders.

***Reality Check Plus:* Imagine Maryland**

Reality Check Plus: Imagine Maryland just started its implementation phase. The three partners—ULI Baltimore, 1,000 Friends of Maryland, and the National Center for Smart Growth—each have a clearly defined role in the implementation efforts. ULI Baltimore will focus on research and con-

vening. Overall, the effort will focus on state policy changes needed in the implementation phase of *Reality Check Plus*. The final report *Today's Vision, Tomorrow's Reality* was released at a statewide media event in September 2006. It assesses how state policies should be changed to support the regional visions and lays out next steps for implementation for one year following the exercises.

Implementation Strategy Funding

Funding for the *Reality Check* implementation strategy is as important as the funding for the event itself. In fact, the recommendations stemming from the exercise will go nowhere without implementation funding. Keep in mind that in some cases it will be easier to solicit implementation funding from some sources after the event is complete and its success apparent; with other sources it is easier to raise money before the event. The budget for the implementation phase can often be more than for the exercise itself. The average

out-of-pocket cost of holding a *Reality Check* exercise is approximately \$100,000. This amount does not include implementation funds. Vision North Texas, for example, was seeking \$150,000 for its Phase II efforts; fortunately, the partnership with the NCTCOG has alleviated this funding burden. The Vision North Texas implementation budget is estimated at \$250,000 per year, including the value of in-kind and private sector contributions.

Conclusion

One of ULI's greatest strengths as an organization with a diverse membership is its ability to tap into the expertise and experience of its members. ULI has identified regional cooperation and coordinated regional planning as a priority. This is a timely issue as the global competition among regions becomes more pronounced. Virtually all growth-related issues—from how to achieve economic diversity to how to integrate land use and transportation planning in order to accommodate growing populations—are regional in scale. The future prosperity of a region will depend to a significant extent on its ability to compete with other leading regions in offering the best mix of economic vitality and lifestyle amenities. Increasingly, District Councils are looking for ways to effect regional thinking in their regions, and *Reality Check* is emerging as one of the key programs by which they can achieve this goal.

Reality Check enables District Councils to provide visible, effective leadership on the regional and local levels. *Reality Check* has proven to be a successful program through which District Councils can engage diverse stakeholders on land use and infrastructure development, both current and future. The program is valued for its flexibility because it can be adapted to meet the needs of each region. At the same time, its core principles make it a valuable and effective program. As a result, *Reality Check* is becoming a recognized brand that has garnered significant press coverage in the regions in which the game has been played. Now, almost five years since the first *Reality Check* exercise was created in Los Angeles, the implementation efforts are showing that the exercise results in positive change in the region—namely, more educated leadership on regional issues, collaborative action across jurisdictions, and implementation strategies and tools that are gaining traction and resulting in more responsible use of land.

As District Councils decide to undertake *Reality Check* programs, this guide can provide how-to instructions and lessons learned. In addition, ULI Community Outreach staff are available to coach and guide District Councils in undertaking this engaging program.

Endnotes

¹ Criterion Planners designed Paint the Region as part of their INDEX suite of interactive GIS planning tools.

² PLACE3S, an acronym for PLAnning for Community Energy, Economic, and Environmental Sustainability, is an innovative planning method that fully integrates focused public participation, community development and design, and computer-assisted quantification tools (GIS). It is jointly supported by the state energy offices of Washington, Oregon, and California. For more information, visit <http://www.energy.ca.gov/places/>.

³ Arthur C. Nelson, PhD, "Toward a New Metropolis: The Opportunity To Rebuild America," The Brookings Institution Metropolitan Policy Program (December 2004): v.

⁴ "A Conversation with Myron Orfield," The Brookings Institution Metropolitan Policy Program, <http://www.brookings.edu/es/urban/publications/orfieldmetropoliticsqanda.htm>.

⁵ ULI Washington created this structure and division of responsibilities for the *Reality Check* Washington subcommittees.

⁶ ULI Washington planned their *Reality Check* event around these four major phases.

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