

Skidaway Island Georgia

May 31–June 5, 2015



Skidaway Island Georgia

Sustaining a Legacy: Recommendations for
The Landings on Skidaway Island

May 31–June 5, 2015

About the Urban Land Institute

THE MISSION OF THE URBAN LAND INSTITUTE is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. ULI is committed to

- Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs;
- Fostering collaboration within and beyond ULI's membership through mentoring, dialogue, and problem solving;
- Exploring issues of urbanization, conservation, regeneration, land use, capital formation, and sustainable development;
- Advancing land use policies and design practices that respect the uniqueness of both the built and natural environments;
- Sharing knowledge through education, applied research, publishing, and electronic media; and

- Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges.

Established in 1936, the Institute today has more than 35,000 members worldwide, representing the entire spectrum of the land use and development disciplines. Professionals represented include developers, builders, property owners, investors, architects, public officials, planners, real estate brokers, appraisers, attorneys, engineers, financiers, academics, students, and librarians.

ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of the world's most respected and widely quoted sources of objective information on urban planning, growth, and development.

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About ULI Advisory Services

THE GOAL OF THE ULI ADVISORY SERVICES program is to bring the finest expertise in the real estate field to bear on complex land use planning and development projects, programs, and policies. Since 1947, this program has assembled well over 600 ULI-member teams to help sponsors find creative, practical solutions for issues such as downtown redevelopment, land management strategies, evaluation of development potential, growth management, community revitalization, brownfield redevelopment, military base reuse, provision of low-cost and affordable housing, and asset management strategies, among other matters. A wide variety of public, private, and nonprofit organizations have contracted for ULI's advisory services.

Each panel team is composed of highly qualified professionals who volunteer their time to ULI. They are chosen for their knowledge of the panel topic and screened to ensure their objectivity. ULI's interdisciplinary panel teams provide a holistic look at development problems. A respected ULI member who has previous panel experience chairs each panel.

The agenda for a five-day panel assignment is intensive. It includes an in-depth briefing day composed of a tour of the site and meetings with sponsor representatives; a day of hour-long interviews of typically 50 to 75 key community representatives; and two days of formulating recommendations. Long nights of discussion precede the panel's conclusions. On the final day on site, the panel makes an oral presentation of its findings and conclusions to the sponsor. A written report is prepared and published.

Because the sponsoring entities are responsible for significant preparation before the panel's visit, including sending extensive briefing materials to each member and arranging for the panel to meet with key local community members and stakeholders in the project under consideration, participants in ULI's five-day panel assignments are able to make accurate assessments of a sponsor's issues and

to provide recommendations in a compressed amount of time.

A major strength of the program is ULI's unique ability to draw on the knowledge and expertise of its members, including land developers and owners, public officials, academics, representatives of financial institutions, and others. In fulfillment of the mission of the Urban Land Institute, this Advisory Services panel report is intended to provide objective advice that will promote the responsible use of land to enhance the environment.

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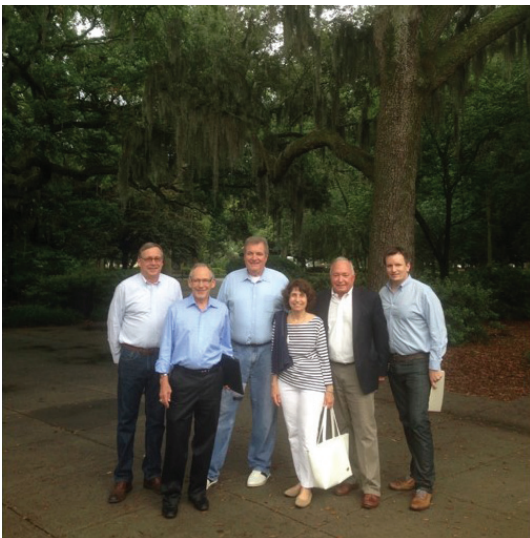
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Background and the Panel's Assignment

THE LANDINGS ASSOCIATION INC. (the Association) asked the Urban Land Institute to consider a series of questions related to the Association's new strategic plan, which identifies five key objectives: environmental sustainability/stewardship; housing; technology; amenities, activities, programs, and services; and governance and decision making. Specifically, the need for a cohesive land use plan is referred to in the housing, environmental, and amenity objectives. The Association recognizes that today's land use choices will determine the success of the community over the next several decades.

The panel's approach was to look at the culture, history, and land economics (including regional and national trends); assess the community's planning and design; and formulate strategies, including some development opportunities for the island. These ideas are combined with some implementation strategies that will help the Association establish a strategic vision to help balance the desires of the community with the pressures of postrecession market trends.



The ULI panel in Savannah, Georgia.

The Panel's Assignment

The sponsor directed the ULI Advisory Services panel to focus on the following key questions:

- How can the total current property inventory be best used to support vibrant growth of The Landings into the next decade and beyond?
- Who is the likely target "resident of our future"? What steps should be taken to attract these future residents?
- What are the most feasible and appropriate undeveloped properties for new residential development, and what are the best types of housing for the current and projected market?
- How do we balance the desire for new housing with the goal of protecting and enhancing our natural environment?
- What are the most effective best practice strategies and incentives to encourage renovation of the housing stock?
- Is there a more efficient or effective organizational approach to the island?
- What are we doing or not doing that detracts from our being the finest southeastern coastal residential community?
- Should amenities be added that would increase property values and ensure long-term viability of our island as a great place to live?
- How can we best leverage our waterfront assets to increase the appeal, use, and viability?



Study area.

- What changes does the Village need to make now and into the future to become a robust and thriving asset for the island?

Study Area and Surrounding Context

The Landings is a gated, planned-development community located on Skidaway Island, an interior barrier island off the coast of Savannah, Georgia. Located in Chatham County, the island is separated from the mainland by the Intracoastal Waterway and the Wilmington River.

The land area of the island is covered by a forest of live oak, pine, magnolia, and other tree species and is surrounded by vast expanses of sea marshes and their abundant wildlife. Skidaway Island is also home to the University of Georgia's Marine Extension Service, the Skidaway Institute of Oceanography, Skidaway Island State Park, the Village commercial area, five churches, and the Marshes of Skidaway Island, a continuing care retirement community.



Regional map.

Many properties in the development have been well maintained by the original owners and the new ownership. New construction on the few remaining vacant lots has increased over the past two years, and permit activity for exterior alterations and additions has increased simultaneously, consistent with data indicating home improvements occur within one to three years following property transfer. However, some properties have not been well maintained and detract from the efforts of the majority of property owners. Common problems include lack of home maintenance and overgrown landscaping. Reinvestment through renovation is critical to maintaining and enhancing all property values. New builds in these areas serve to accentuate existing disinvestment in neighboring properties.

History of The Landings

In order to understand The Landings of today, the panel researched the history of the community since its founding.

In 1941, the Union Bag and Paper Corporation (later named Union Camp Corporation) purchased pine woodland acreage on Skidaway Island to supply its paper mills in the South, becoming the owner of the largest tract of property on Skidaway Island (5,006 acres of highland and 4,089 acres of marshland). By 1953, barge transport of pulpwood was uneconomical and harvesting gave way to nature. By 1965, the Metropolitan Planning Commission of Savannah and Chatham County recognized the potential value of the coastal islands for future development and



JOHN TAYLOR



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CLIVE BARBER

Views of The Landings, showing the natural beauty and abundant wildlife of the island. The panel recognizes that this element is attractive to current residents and future homebuyers.

ultimately obtained voter approval of a referendum to fund a causeway and bridge to Skidaway.

In exchange for the cost of the causeway, Union Camp Corporation gave 500 acres to the state and federal governments for oceanic research and teaching facilities on Skidaway Island and 267 acres for a state park that was increased in size by a purchase of an additional 109 acres from Union Camp in 1969. The causeway and bridge were completed in 1972 and began operations the same year. The state park opened in 1975. Union Camp purchased a 49 percent interest in the Branigar Organization, a Chicago-based land development company, in 1969, which subsequently became a wholly-owned subsidiary. Thereafter, some 500 acres of Union Camp land was transferred to Branigar, and additional acreage was taken over later.

The developer's plan was to develop this entire tract over a period of years as a planned "natural community"

with a high-quality image for permanent residents and preretirement/second home or retirement owners. A project manager was hired in 1970, and Sasaki, Dawson & Demay Associates of Boston (now Sasaki Associates) was retained to do the planning. The original plan called for five golf courses (now six), tennis courts, marinas, schools, churches, sites for commercial development, and other facilities for a self-contained city.

The Landings Club, also developed by Branigar, was chartered to draw its membership exclusively from The Landings' property owners. However, all property owners were not required to become members of The Landings Club. The club is a separate legal and operational organization with its own board of directors and staff. Today, approximately 70 percent of Landings property owners are members.



The Landings on Skidaway was awarded a ULI Award for Excellence in 1986.

Governing The Landings

In its 1972 charter, The Landings community association was governed using two key documents:

- The General Declaration of Covenants and Restrictions; and
- The Articles of Incorporation.

These documents establish the Association as a governing body and establish the rights and responsibilities of the organization and residents in managing and protecting the community. Branigar continued to manage The Landings with assistance from the community until 1995, when it fully transferred ownership and responsibility for the common property to the Association. The developer completed the transition to the homeowners association and ultimately departed in 1998, when the last lots were sold. In 2003 and in 2004, the property owners approved the annexation of two additional properties located off Green Island Road, adjacent to the existing community (Marshview Landing and Moon River Landing). The Landings now consists of the following seven phases, from oldest to newest:

- Phase 1 (Marshwood): 1,554 lots (34 undeveloped);

- Phase 2 (Plantation): 1,492 lots (88 undeveloped);
- Phase 3 (Oakridge): 623 lots (38 undeveloped);
- Phase 4 (Deer Creek): 335 lots (24 undeveloped);
- Phase 5 (MidPoint): 247 lots (22 undeveloped);
- Phase 6 (Marshview Landing): 50 lots (0 undeveloped); and
- Phase 7 (Moon River Landing): 119 lots (79 undeveloped).

Covenants and Restrictions

The developer recorded on each lot a declaration of covenants, easements, and restrictions that are designated for the common benefit of all residents in the community. Pursuant to the declaration, each lot is assessed annually with a reasonable amount necessary to defray expenses and other costs in connection with maintaining all common properties and facilities, which are designed for the use of all residents in the development.

The community initially was developed in four phases. As each new phase was developed, covenants were filed to reflect the unique character of the additional properties.

Covenant revisions have been a governance issue of importance to the Association for a number of years. Until relatively recently, the Association has operated pursuant to the original 1972 covenants. In early 1997, with the departure of Branigar imminent, the community approved a covenants change to create a new corporation (The Landings Company, a wholly owned subsidiary of the Association) to market, sell real estate, and collect a transfer fee of up to 1 percent to fund the national marketing. A lawsuit was filed in 2000 by a member seeking a declaration that the 1 percent transfer fee was invalid. The issue ultimately was heard by the Georgia Supreme Court, which ruled that the transfer fee covenant was not properly established in accordance with the amendment provisions of the original covenants. The vote was invalidated because of procedural errors emanating from a 1997 vote held by Branigar (also invalidated) that included filing “clarifying” supplemental declarations, which the court ruled were substantive.

A successful vote was held in 2007 to change duration provisions (to hold a vote when warranted rather than every ten years) and for covenant changes to become effective (after approval of two-thirds of total property owners) upon recordation, rather than waiting for a three-year period. This change became effective in 2009 following the three-year waiting period. In 2013, a successful vote was held to adopt the Georgia Property Owners' Association Act. This act gives the covenants statutory authority, sets standards for Association operations, makes all covenant changes binding on all property owners, eases collecting delinquent assessments, and continues to require a two-thirds vote for adoption of future covenant revisions.

The Homeowners Association

Branigar created a not-for-profit corporation under the laws of Georgia, known as The Landings Association Inc. Each lot owner, by acceptance of a deed, becomes a member of the Association automatically, with all the rights, privileges, and obligations pertaining to such membership. The Association is intended to perform services similar to those that would be performed by a municipality and to maintain the common properties and facilities and pay the associated expenses from the assessments made against property owners. The Association is responsible for managing the following assets and amenities:

- 4,621 total acres (including 715 acres of common property, 574 in turf, four in athletic fields, 22 in gatehouses; 115 acres in forested areas for recreational use, excluding IP Property and spray fields);
- 91 miles of roads and 30 miles (22 paved) of paths and trails on common property;
- 313 center islands and medians;
- 11 bridges
- Seven gated entrances (serving more than 10,000 vehicles daily);
- 4,420 lots, including 4,123 homes completed and 297 undeveloped lots;



The Landings Association

The Landings Association was established as a governing body and homeowners association in which every property owner is a member.

- 151 lagoons (totaling 269 acres);
- Three recreational vehicle (RV) storage yards;
- Two deepwater marinas, with 385 boat racks and slips;
- Two athletic fields;
- One playground;
- One dog park;
- One recycling facility;
- One nature trail; and
- One native plant trail.



The Association owns The Landings Company, which provides real estate services and markets the community.

The Landings Club

From 1987 to 1989, community discussion ensued concerning the future of The Landings Club upon departure of Branigar. Various committees studied the feasibility of resident ownership of the club through an equity buyout from Branigar. In 1989, Branigar presented a buyout proposal to all Landings property owners; a large majority of property



The Landings Club is a private golf club that draws its membership exclusively from The Landings property owners. In 2015, about 70 percent of property owners are members.

owners accepted the proposal and made the required buyin payments, which were placed in escrow because of litigation. Although litigation precluded official approval of the equity buyout of Branigar's club facilities, The Landings Club's board of directors was elected and took office in 1989. As specified in the buyout arrangement, Branigar continued to have representation on the club board and to participate in the management and financing of The Landings Club until 1989. The litigation eventually was settled, and in 1991 the escrow was released and Branigar issued equity certificates to the members.

The club is responsible for managing the following assets and amenities:

- 108 holes of golf;
- 48,000-square-foot fitness center;
- 40 miles of club trails;
- 34 tennis courts;
- Five pools; and
- Four clubhouses with restaurants.

The Community

The Landings has a characteristically strong social community. Residents participate in or create social avenues to satisfy their wide range of interests. Because not all residents are club members, this network of social clubs and organizations enables all residents of the island to be active in their community if they wish to do so. The Association, The Landings Club, and The Landings Company



each provide various opportunities for property owners to volunteer on committees and leadership boards. The Association's strategic plan states that an important objective in supporting the community's social atmosphere, is to develop and deliver an expanded array of amenities and services that complement those offered by the club, and promote an active lifestyle, create a strong sense of community, and are valued by current and future residents.

Summary of the Panel's Recommendations

The panel's primary recommendation is that The Landings should be repositioned as a multigenerational, engaged community. This goal means the resident of the future should be offered a multitude of social and community amenities in addition to the current focus on golf. With these thoughts in mind, the panel's primary recommendations include the following:

- Analyze and understand the market trends and opportunities facing The Landings and Skidaway Island.
- Prepare and adopt a set of strategic island objectives to help guide the future of the island. The panel has outlined those strategic objectives in this report.
- Build on and expand the new branding and marketing initiative.
- Consider alternative and replacement housing in a variety of forms and locations throughout the island.
- Update the island master plan.

- Consider a variety of new approaches and physical amenities, such as connecting The Landings to the Greater Savannah region; improving mobility and connectivity; identifying and constructing new gathering places; undertaking specific site development actions for the new harbor development; creating a mixed-use site adjacent to the Village center; developing portions of the spray fields; and relocating the island's welcome center.
- Structure the three entities (Association, club, and company) to achieve the island's strategic goals.

The remainder of this report elaborates on these and other recommendations.

Market Trends and Opportunities

THIS REPORT BEGINS WITH AN OVERVIEW of regional and national market conditions and economic indicators that have helped inform the panel's work and subsequent recommendations. Understanding the socio-economic trends that are affecting the study area can help planners identify the potential and pressure for future land uses. ULI believes that successful urban planning and land use policy can best be described as public action that generates a desirable, widespread, and sustained private market reaction. Therefore, Advisory Services panel reports typically have their foundation in market possibilities.

Demographic Profile

The Landings is home to an estimated 8,500 residents at peak times in 4,123 homes. Singular income data for The Landings' property owners are not available, however; the demographic information is based on the zip code that includes the entirety of The Landings.

According to 2010 census data, approximately 34 percent of Skidaway Island's households have incomes greater than \$150,000, compared with only 8.7 percent of households in the Savannah Metropolitan Statistical Area and 8 percent of all Georgia households. In short, The Landings is a wealthy residential-island community.

The Association collects demographic data each year with its homeowners' dues billing statements and periodic

Mean Household Income	
Skidaway Island	\$106,260
Savannah metro area	\$49,535
Georgia	\$49,179

community surveys. Of those who responded, the following data are notable:

- The Landings' average household size is two persons.
- Of respondents, 75 percent do not have plans to relocate.
- The average age has increased to 60 (from 54) over the past ten years.
- The percentage of minors remains under 13 percent.
- Of owners, 80 percent live at The Landings year round.

Potential Housing Consumers

The panel believes three effective residential markets exist for The Landings. Understanding these markets is essential to addressing the long-term goals of increasing the island's population, vibrancy, and resiliency.

Existing Population

The first market is the existing population of The Landings, who over time will seek alternative living options within the community. For example, they may include younger families who initially moved to the community for the lifestyle and who may seek a larger home as their personal income and family size increase. This group will also include existing residents who may trade laterally into a similar home elsewhere on the island and those who may seek or need different options as they age and want to stay connected to the community where they have friends. Each transition potentially creates a vacancy of an existing residential unit that can be filled by someone else. The relatively low rate of construction in recent years would indicate relatively limited demand. Looking at this projection in isolation

would, on the surface, say the existing available lot inventory, if sold at market rates, could satisfy demand for many years to come.

New Homeowners from the Savannah Region

An increase in regional housing demand exists through natural population and job growth in Savannah. This increase is a second residential market that should be targeted by The Landings. Demand would accrue to both rental and owner-occupied units. Predicated on recent new residential sales in the Savannah market through the third quarter of 2014, nearly 1,200 units were absorbed, and approximately 12 percent of total demand fell within the price range of units recently being sold within The Landings. These data indicate that a relatively robust pool of potential buyers might be attracted to The Landings within the next few years if supply were available, incremental to the demand that may exist predicated on the inventory of existing options on the island.

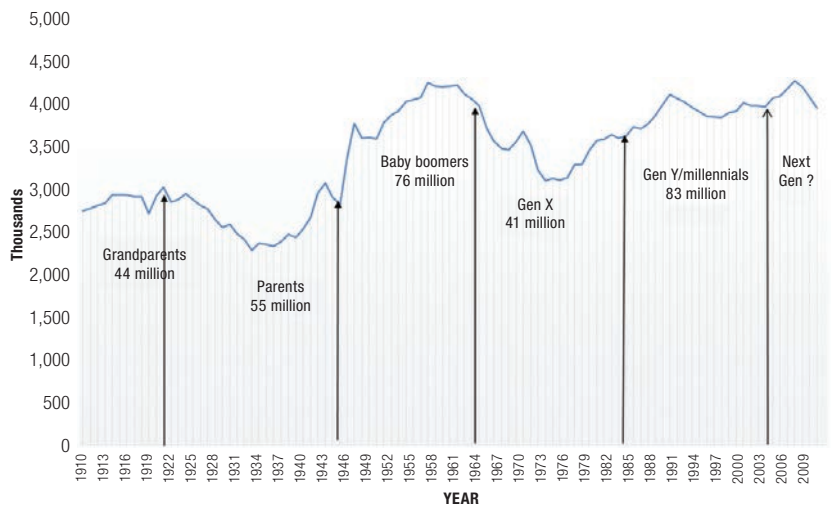
New Homeowners from Outside the Region

The third residential market is the individual or family that historically has been a large contributor to housing demand throughout the Carolinas, the rest of Georgia, and northeastern Florida, that is, the preretiree moving into communities similar to The Landings. Historically, the Northeast and Midwest sectors of the U.S. population have been the feeder markets, whose residents first come to the Low Country as visitors, become repeat vacationers, and over time become enamored of the region and purchase a home. This group is dominated by the 45 to 65 age bracket, individuals who have reached a stage in their lives when they are looking for (a) a family gathering spot, (b) a potential retirement location, or (c) a legacy investment for the family.

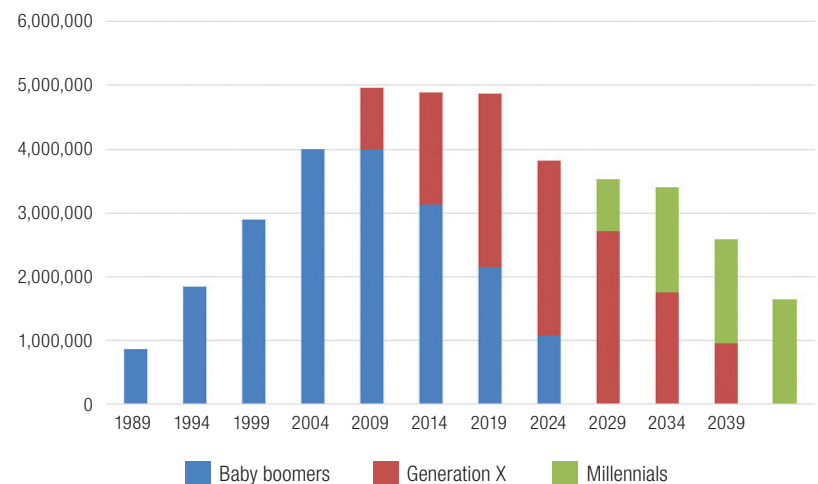
When speaking about potential market size, discussing it in terms of generational segmentation is useful. Baby boomers are those generally described as born between 1945 and 1963, when the birthrate dropped dramatically. Generation X is generally considered to be those born between 1964 and 1984; it is a market that is roughly two-thirds the size of the baby boomer population. Millennials

represent those born after 1985, and the defined end of their generational run is still open for discussion. The first figure shows the clear changes in birthrates that helped create these definitions. The second figure shows the size of the 45 to 65 age bracket households by generational names over time. Subsequent discussion sheds more light on the potential demand from this sector.

Generational Definitions



Eastern Regional Population Ages 45–65 over Time, by Generation



The Impact of the Recession

Although one's age and where one is in a career historically have been key determinants in attracting the preretirement/second-home or preretirement buyer to a community such as The Landings, significant lifestyle shifts have affected demand over time as well as the ability to attract these families. Interest in ownership has also varied over time. The original emphasis in preretirement/second home purchase was on personal use, which tended to mitigate the consumer's willingness to commit large amounts of financial resources, resulting in relatively modest development occupied seasonally. Starting in the 1980s, as the baby boomers plunged into the market, price escalation in many preretirement/second home locations began to outpace the rise in primary housing values, which resulted in a shift to a user-investor profile, in which a preretirement/second home purchase increasingly became justified less on the perceived use pattern and more as a pure alternative investment. This trend came to a peak with the easy money and lending standards that emerged during the early 2000s.

The net result was an artificial escalation of both price and demand that came to a resounding end subsequent to 2007–2008. In recessions since 1980, when the growth

of the preretirement/second home market started to accelerate, the duration of recessionary events was relatively short (less than a year) and the effect on gross domestic product (GDP) was relatively modest. The most recent recession lasted longer, and the effect on GDP was double that of any other event since 1980. During other recessions during that time frame, the effect on the preretirement/second home market was a relatively short period of slackening demand with little downward pressure on prices. Since 2007, unlike in previous recessions, a virtual standstill in demand occurred, and in most markets, price erosion was equal to, or in some locations greater than, the effect on primary housing values.

However, other factors affect the demand for this type of housing, including the willingness to make a purchase decision and the buyer's expectations. Significant changes in day-to-day lifestyle issues have complicated the decision. Significant time compression, the increase of women in the workforce, the escalating cost of primary housing relative to household income, and the increasing competition for discretionary income all come into play. The figure highlights some of these changes over the decades while preretirement homes or second homes have been a feature in the American landscape.

Core Household Dynamics

1950 to 1980	1990 to 2010
<ul style="list-style-type: none"> ■ Marginal tax rate at 71 percent ■ Low historical immigration ■ Baby boomer entering the workforce ■ Affluent middle class ■ Growing real household income ■ Women's labor participation = 12 percent ■ Single-income household ■ Aggregate debt to qualify for a mortgage at ± 20 percent of income ■ Good public schools 	<ul style="list-style-type: none"> ■ Marginal tax rate at 35 percent ■ High immigration rate ■ Baby boomer leaving the workforce ■ Shrinking middle class ■ Declining real household income ■ Women's labor participation = 65 percent ■ Dual-income household ■ Aggregate debt to qualify for a mortgage at 35 to 40 percent of income ■ Private schools

Decline in Home Prices in Selected Communities

Community	Peak year	Price erosion through 2012
Kiawah Island, South Carolina	2007	-35%
Palmetto Bluff, South Carolina	2007	-52%
Sea Island, Georgia	2009	-39%
Sea Pines, South Carolina	2004	-52%

Source: permar.

As referenced in the discussion of the effects of the pre-retirement/second home market nationally, similar effects have occurred in the region among what may normally be considered comparable or competitive golf-oriented, amenitized, preretirement/second home or preretirement master-planned communities. Although a current market analysis was beyond the scope of this report, the panel is aware of serious erosion in the prices of real estate among the competitive set. While rebounding in value, most are still depressed from their previous highs and may take significantly more time to regain their value.

The real estate sales history shows that The Landings has been an unfortunate participant in the regional malaise among similar communities, as demonstrated in the figure. Values are still below what they were previously. Sales velocity has slowed, albeit this may be affected by lack of inventory or the unique variety of what has been available on the resale market. It may not greatly improve without developing and marketing substantially more and newer inventory.

In the longer term, because of some of the lifestyle and consumer appetite considerations previously discussed, sales prices may not return to the levels experienced before the recent recession. Also impeding introduction of new product is the large collection of resale inventory at existing communities throughout the Carolinas, Georgia, and Florida.

Club Target Demographics

The Landings Club has indicated that its target audience is the senior executive 55 to 65 years of age with an income



STEVEN MCGRIDE

The Landings Club manages five dining facilities. No nonclub dining options are available within the gates of The Landings. Pictured is Deer Creek—A Coastal Grill. Deer Creek is the most recently updated clubhouse.

of approximately \$200,000. These characteristics effectively describe the top 5 percent (by income) of households in the United States. Maintaining this ongoing target for the marketing strategy may have implications for the club and The Landings community as a whole.

The two figures on the following page illustrate the size of the available markets with two different focuses. The first figure illustrates the size of the population by respective generational age groups over time in the historic feeder markets (the Midwest and Northeast). If this population is further filtered to reflect household size, is qualified for income (top 5 percent), and reflects normal mortality estimates, a different picture emerges. The first figure shows the available households within the narrower 55–65 age bracket of the club's target market. The second figure shows the broader market available if the emphasis is on a wider generational group. Both figures take into consideration a probable 30 percent penetration of the available market for golfers.

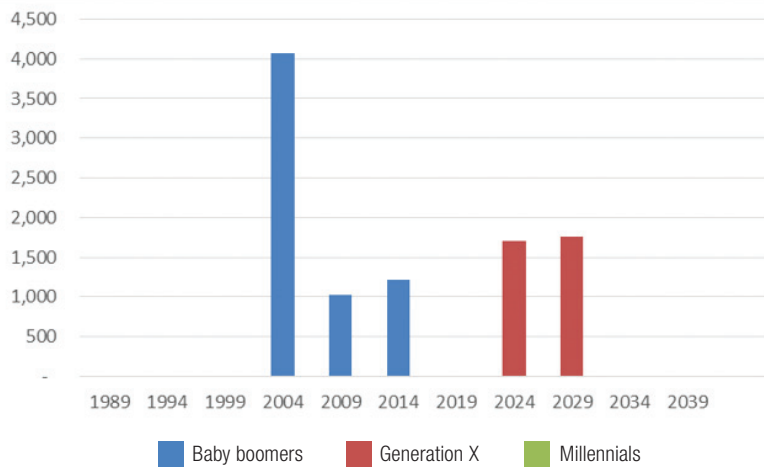
The Landings on Skidaway is known both regionally and nationally primarily as a golf community. Golf carts used both for golfing and island transportation by island residents are a common sight around the community.



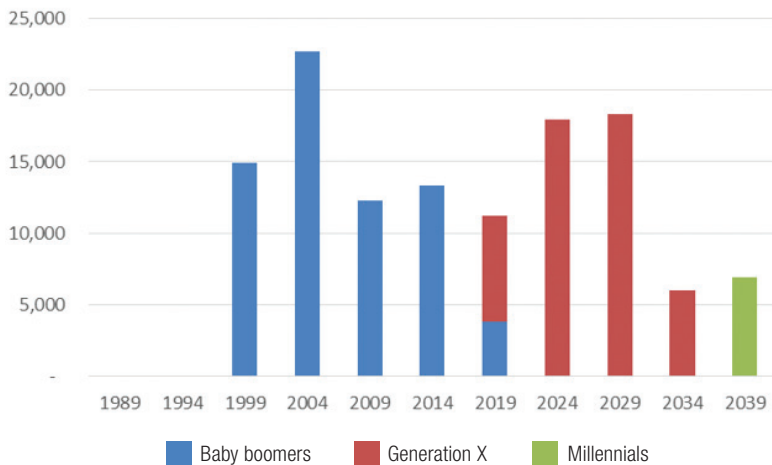
In both age brackets, the overall market clearly is shrinking through 2024, subsequent to which the influence of the millennial generation may begin to be felt. Little is known about the aspirations of this group and whether they will share the same appetite for golf and other recreational pursuits evidenced by the baby boomers or gen-Xers. One may only assume they will be facing the same lifestyle decisions as their predecessors reaching the same age benchmarks.

From the panel's perspective, these observations on the size of the available market may present challenges and opportunities to both the club and The Landings community. As described in this report, opportunities exist for additional housing to be created within The Landings. The growth in housing demand for the general market surrounding Savannah almost certainly will exceed that which may be generated from the preretirement/second home or retirement market. The panel believes the club will continue to have available golf capacity for years to come, which may entice it to seek other revenue opportunities. Options for consideration may include allowing some outside/nonmember play, hosting community events, and even eventual conversion of some of the golf assets to residential uses. At the very least, the club and The Landings community must work together to encourage future development.

Income-Qualified Households Age 55–65



Income-Qualified Households Ages 45–65



Market Trends in Discretionary Residential Recreation Communities

As previously noted, the ownership, development, design, marketing, sales, and core economics of discretionary residential recreation communities have changed since the recent recession. Changes can be traced to generational demographic shifts, life-stage changes, emphasis on multigenerational communities, excessive supply and limited demand affecting value, and dramatic fluctuations in net worth—all resulting in a “new normal.”

Changes in Consumer Profiles

Today's family households are often time-constrained, dual-income working parents with children in year-round

sports programs and extracurricular activities in multiple locations. Family life is often more complex than it was when The Landings began, including second marriages, merged families, multiple sets of grandparents, multiple sets of siblings, the extended family, and the role of friends in the dynamics of a family household.

Today the single household has become a viable market segment in discretionary residential recreational communities. At both ends of the age spectrum, the mobile single household is increasing. Single male or female households can be never-married professionals, widowed former spouses, or divorced individuals who may or may not have children.

Today's preretiree and retiree couples often start second careers or pursue some form of meaningful endeavor in response to early retirements or in anticipation of greater longevity. The portion of the market that considers relocation spends considerable time researching options online and through exploratory visits to amenitized small towns and urban settings near universities, cultural centers, and grandchildren and other family as well as resort towns and communities. Some retirees choose a high-amenity community to encourage visits from their children and grandchildren. The current generation of preretirees and retirees places high value on engaged, stimulating, authentic multigenerational communities or places rather than a traditional, homogeneous, retirement community.

Housing and Design

Influenced by collaborative working styles, the speed and flexibility of new technology, and cultural shifts, convenience, transparency, flexibility, and casual elegance are drivers of the new normal. Current community amenities and homes are being designed to respond to fast-changing cultural and functional demands. The design of many houses now includes the following:

- Educational or recreational space that serves as a performance auditorium, which converts to a dining space, resets as a collaborative work space, and ends as a workout space or classroom in a single day;

- New primary housing that mimics resort housing with an open kitchen, a secondary prep kitchen, multiple eating spaces, a technology center, and gathering spaces all open to the outdoors, replacing the once universal configuration of kitchen, breakfast nook, family room, formal living room, and formal dining room; and
- Small housing units that serve as the getaway from the larger, rural primary residence or become the addition to house a member of the extended family.

Developments and operators are investing more in the programming of flexible assets or spaces and a person to manage the process than in heavy capital investments and the burden of high maintenance and carrying costs. Skillful programming often is being provided through collaborations and outreach to like-minded affiliates and partners that support the target consumer audience.

Discretionary residential recreation communities are exploring how to provide for the wants, needs, and desires of all the members of multigenerational households today and moving forward through amenities, programming, and residential product.

Value and Values

Factors influencing the buying decision go beyond location and price point. Technology and communication tools make researching options and defining value easy for consumers.

The new informed consumer evaluates the carrying cost as intensely as the acquisition cost. Completed landscaping, amenities, and homes are valued more than promises. Endorsements by trusted friends and family are valued more than a packaged presentation. Personal or secondary knowledge of the loss of equity in real estate properties, failed communities, and overamenitized broken clubs all form part of the informed discretionary buyer's decision process. A large number of experienced consumers are buying cautiously within their means.

Brands that reflect or align with consumers' values add further value. Wellness, environmental consciousness,

natural environment, food-based strategies, physical activity, personal experience, and healthy living are highly valued on consumer preference surveys. New discretionary residential recreation communities are being built with these core values and outperforming surrounding real estate.

Market Opportunities and Value Creation

Multigenerational engaged communities aligned with consumer core values have sustained and increased value during and after the recession. Martis Camp in Truckee, California (see box), is a noted example of this trend. Targeting multiple segments is a proven strategy to achieve reasonable absorption over time. Adapting economically sustainable practices is a proven strategy to maintain a healthy community over time.

Lahontan—also in Truckee—is perhaps the antithesis of Martis Camp. Lahontan was the first dedicated golf course

community to be introduced to the Lake Tahoe area, coming to market in the mid-1990s. It comprises 906 acres, providing 509 lots. Amenities include an 18-hole, Weiskopf-designed championship course and a nine-hole, par-three facility. The lots were sold out before 2000, and the club was turned over to the members at that time.

Significant controversy arose over the membership during the sales cycle. Not all the available memberships were absorbed by real estate buyers, and the developer wanted to market the unsold memberships to the outside public. The members ended up purchasing the remaining openings at a discount and revised the membership program to preclude outside sales. The membership is 75 percent equity and during the recession came under significant pressure. In 2006, only 310 of the allowed 350 memberships remained, with a waiting list to exit the club. Many members merely returned the memberships and paid the transfer fee, essentially walking away from what in 2006

Martis Camp

Lahontan has undoubtedly been affected by the success of Martis Camp, its immediate neighbor, which offered a superior lifestyle amenity package. Commencing sales in 2006, this 2,177-acre development offers a Tom Fazio–designed championship golf course but also has direct connectivity and private lift access to Northstar ski resort. Contrary to current trends in clubhouse size, Martis Camp boasts a 60,000-square-foot facility, plus the 18,000-square-foot community “barn” that houses a variety of recreational pursuits, including a bowling alley, a half-court basketball area, a 52-seat movie theater, a soda fountain, a crafts studio, and a variety of other gaming venues.

Attached to the barn is a three-pool swimming facility and an outdoor amphitheater. Other areas include bocce ball, an 18-hole putting course, and the “lost library” cabin. Despite the total size of the development, it has only 653 lots, ranging from as small as half-acre “cabin” sites in the immediate vicinity of the barn, fishing lake, and putting course, to as much as five acres on the periphery of the development. The typical lot ranges in size from 1.5 to 2.5 acres.

The success of Martis Camp has defied the experience of most developments during the recession. The buyer has embraced the multigenerational lifestyle that is provided through the amenity structure. In the initial sales year, Martis recorded \$73 million. In 2010, 60 homes were completed and 60 were in construction. Through 2010, a total of 503 lots were sold with 117 homes under construction and another 92 in design review. As of the end of October of 2013, 93 lot sales had taken place in 2013, greatly exceeding the previous averages.

A social membership is provided with each lot, and even where a property may have multiple owners, each owner is entitled to a membership. Contrary to the experience at Lahontan, membership values have increased since sales began.

The golf membership structure allows for 375 total members, and current sales total 275. Initiation fees in 2010 were \$105,000 and are now \$120,000. Real estate values have steadily increased since inception. Reportedly, the average buyer is 46 years of age and has small children at home.

amounted to a \$175,000 initiation fee. This situation put more pressure on the remaining membership, leading to significantly increased dues from what had already been the highest for any club in the region. Reportedly, initiation fees sank as low as \$10,000 during the peak of the recession, but they have rebounded since, with the most recent sale being \$52,000.

The disruption in the club obviously had an equally large effect on real estate values. When originally offered in the mid-1990s, lots ranged in value from just under \$200,000 to over \$400,000. In 2012, more than 20 resale listings for under \$100,000 were being marketed.

Market and Marketing Conclusions

The Landings is now a mature community. It began as a preretirement/second home, private, gated golf community and evolved into a vibrant community where approximately 70 percent of the owners are members of the tiered club program, and of those, 30 percent of the owners are full golf members.

Over time, improved island access and market-price adjustments have supported an increase in Savannah area family households owning in The Landings. Currently, of

the 8,500 residents in The Landings, about 1,000 are children, yet the amenities and activities for such families are clearly lacking if they do not join the club.

The two primary target segments, with many variations through age range and interests, are family households and couples. A smaller secondary target segment is single households.

Real estate buying opportunities or products include resale of existing homes. Because some of the homes are dated, a builder and architect program to support refurbishment of exteriors and interiors is being developed by The Landings Company. Because some 300 unbuilt home sites are disbursed throughout the community, a program should be developed to explore alternatives and pair builders and architects.

Adapting the current market trends, embracing the interests and energy of residents of all ages, and using newer real estate sales and marketing practices and best practices of smart segmentation in the future development of amenities, programming, and products, The Landings has the opportunity to reposition itself as a multigenerational, engaged community and protect its potential to thrive as a sustainable community.



An example of residential product offerings. Most homes in The Landings are detached, single-family homes on large individual lots. A number of attached homes exist in the older sections of the development.

Island Objectives

BASED ON THE PANEL'S ASSIGNMENT, the information gathered through the dozens of interviews conducted during the panel's week in Savannah, as well as through the extensive experience of the ULI panelists, the panel has developed 12 island objectives for the Association, the club, and the company, to guide conversations and to inform its recommendations. These objectives (outlined below) build on the market considerations outlined in the previous section.

Increase Population

Increasing the population of The Landings is good for all constituencies. Not only does increased population result in increased revenue for the Association, but it also provides a larger pool of potential members for the club and a larger base of support for essential services, retail, and community amenities. To accomplish this goal will require increasing the number and types of residential products, opening new land for development, targeting a wide range of potential residents, and taking steps to improve the marketability of the community.

Increase Residential Product Offerings

In the past, the emphasis has been on detached, single-family residences on large individual lots. This strategy has resulted in the number of homes and variety of housing offered on the island being somewhat limited.

To attract and provide for a larger population base, a new model is required. The community needs a wide variety of housing options suitable to a full range of ages, life stages, and interests. To maintain its appeal, the community must have housing for everyone—from the young, single professional to growing families, to retirees, to those inter-



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The panel identified the spray fields as an opportunity for future development.

ested in nature, to those interested in golf, and for those hoping to age in place within the community.

Identify Developable Land

Development of new housing, especially new types of housing, requires land. Fortunately, the panel has determined that land is available within The Landings' and The Landings Club's holdings for near-, mid-, and long-term development. A number of smaller tracts are available for immediate development with few impediments and little cost. Several larger tracts, notably the spray fields, are also available, but these will require substantial time, effort, and cost to make them suitable for development.

Establish a Redevelopment Initiative

The earliest phase of The Landings is now 40 years old. Some of the residences within this phase are showing their age. Changing tastes in architectural styles, lot configurations, floor plans, and finishes, combined with deferred maintenance issues, have resulted in some of the homes needing substantial redevelopment. Numerous interview-

ees, including Association employees, residents, and local realtors, were of the opinion that as a result of these aging and maintenance issues, certain older sections of the community are now deemed less desirable by potential residents and are viewed as having a negative impact on the perception of the community as a whole.

As a result, the panel believes the Association needs to establish a redevelopment initiative targeted at encouraging and facilitating the rehabilitation and redevelopment of existing homes and emphasizing upgrading and replacing these homes to fit evolving market demands. Important components of this initiative must be continuing the review of existing architectural review guidelines, requirements, and procedures, as well as introducing incentive and financial assistance programs, possibly including homeowner or developer grants and loans, designed to encourage rehabilitation and redevelopment of existing homes.

Modify Branding and Marketing to Attract a Wide Range of Residents

At present, the branding and marketing effort of the community appears to be focused on the 50-plus golfer. However, the panel determined that the availability of high-quality golf is just one of many attractive features of The Landings. Although The Landings Club offers an outstanding facility and experience to those interested in golf, Skidaway Island and The Landings have a great deal to offer residents and potential residents in addition to golf. As a Low Country barrier island, Skidaway provides residents of The Landings with a spectacular natural environment of mature maritime forests, expansive marshlands, abundant wildlife, and extensive waterfront with deepwater access and exquisite views. In addition, The Landings has a strong sense of community with more than 100 clubs and organizations addressing a wide variety of interests and activities.

Although the community's current marketing materials promote the natural beauty of the island and the strength of the community's social network, the panel believes emphasis on the natural environment and social aspects of

The Landings should be further leveraged in the marketing and branding campaign. In the panel's opinion, a balanced marketing campaign featuring the natural environment, the social network, and golf is essential to attracting a wide range of residents.

In addition, the panel recommends that the revitalized marketing campaign should emphasize the suitability of The Landings for a full range of ages and life stages. With extensive nature trails suitable for biking, jogging, and hiking; boating; swimming; golf; an exercise facility; and a myriad of clubs and activities, The Landings is an attractive residential option for young working singles, growing families, and retirees.

Expand the Amenities Available to the Community as a Whole and Improve Connections to the Greater Savannah Region

After extensive discussion and analysis, including consideration of the effect on The Landings Club of implementing this recommendation, the panel believes that expanding and enhancing the amenities available to the community as a whole is critically important for the Association. To date, community amenities have been primarily in the province of The Landings Club. As a result, community residents who are not members of the club do not have access to amenities that are standard at most communities of this scale. The lack of a significant amenity package available for all residents, regardless of club membership, may limit the appeal of the community to potential residents.

In making this recommendation, the panel acknowledges the perception that providing certain amenities to all residents through the Association may negatively affect The Landings Club. However, the panel believes that providing such amenities to all residents increases the competitiveness of The Landings and will allow it to capture a higher percentage of the market.

In addition, connecting to the wider Savannah community will help provide the local area with a better understanding



The Landings Club operates a 48,000-square-foot fitness facility. Oakridge Fitness and Wellness Center offers fitness classes, spa services, two indoor pools, and one outdoor pool. Physical therapy is offered on site by a local provider. Currently, property owners must purchase an amenity package through the club to use the facility.

of The Landings and Skidaway Island and will encourage additional interest in homeownership from this local market.

Expand and Enhance Available Retail

Currently, retail available on the island is limited. Whether through the expansion and improvement of the Village retail center or through the development of an additional retail center, The Landings should have a viable retail presence on the island. A properly designed and tenanted retail center targeted at the needs and interests of The Landings' residents can add to the attractiveness of the property to residents and potential residents by creating a place for social interaction and gathering. In addition, a vibrant retail center located outside the community's gates can serve as tool for introducing nonresidents to the community.

Using ESRI data, the panel has estimated the need for an expanded retail presence on the island (retail potential). In conducting this review, sales to businesses were excluded. The ULI panel ran data for a ten-, 20-, and 30-minute drive time centered on the middle of the island. The panel's analysis revealed that within a ten-minute drive of the center of the island, strong demand exists for restaurant space and to a lesser extent general retail

space. The panel believes the indicated restaurant demand is the result of the combined effect of the large disposable incomes of the residents of The Landings, the inaccessible club dining options for nonclub members, and the lack of restaurant space on other parts of the island. On the basis of this review, the panel estimates demand for an additional 20,000 to 25,000 square feet of restaurant space.

For the same ten-minute drive time, the panel estimates a need for the following:

Health and personal care	40,000 square feet
General merchandise	85,000 square feet
Clothing and accessories	30,000 square feet
Books and periodicals	2,500 square feet

The panel sees little or no projected need for uses such as grocery stores, furniture stores, or sporting goods.

These numbers represent the current projected need, and a reasonable "capture" rate, specifically for the island, rather than off-island areas that were the subject of this analysis, will determine the specific need for various uses.

Develop a Comprehensive Landscape and Water Use Plan

The shortage of potable water poses a real threat to the viability and growth plans of The Landings and the club. Both the Association and the club are to be applauded for recognizing the need for and implementing significant water conservation measures, including the club's reseeded the golf courses with low-water grass and the Association's having converted its traffic medians to natural landscaping. Unfortunately, both organizations and the island's residents will likely be subject to much more severe restrictions on water use in the future. In addition, any increase in the number of residential units will exacerbate the situation and make water conservation efforts even more important.

The availability of potable water is not an Association issue or a club issue but an island issue that requires a coordi-

nated response. Therefore, the Association and the club, jointly and preferably in coordination with other significant island residents, need to continue to explore and develop a comprehensive water use and conservation plan. The Association's Strategic Water Committee, including representation from the club and Utilities Inc., is the appropriate vehicle to develop this plan.

Establish a Climate Task Force and Implement a Coastal Resilience Plan

As a coastal community, Skidaway Island is faced with the challenge of rising sea levels brought about by climate

change. Rising sea levels exacerbate the frequency, intensity, and scope of devastation caused by natural hazards—particularly flooding, wave and wind forces, and storm surges. Population growth and continued development will expose the island to more risk and will cause the cost of natural hazards to grow worse.

For Skidaway, even modest sea-rise projections pose a challenge. Current forecasts, prepared by Climate Central, an independent research organization (www.climatecentral.org), indicate that sea level in the Skidaway area will rise 13 inches by 2050. This rise in sea level

Climate Mitigation and Coastal Resilience

As a coastal community, Skidaway Island is faced with the challenge of rising sea levels brought about by climate change. Rising sea levels exacerbate the frequency, intensity, and scope of devastation caused by natural hazards—particularly flooding, wave forces, and storm surges. Thorough implementation of proper adaptation and resilience strategies will help not only preserve but also protect the community's economy, habitat, people, and infrastructure.

An appropriate climate adaptation and coastal resilience plan to protect the island minimizes flooding costs, lowers insurance premiums, and drives down the cost of doing business—all while enhancing economic development and improving quality of life. Preservation and protection of the waterfront mean that future generations can enjoy the community that locals take pride in.

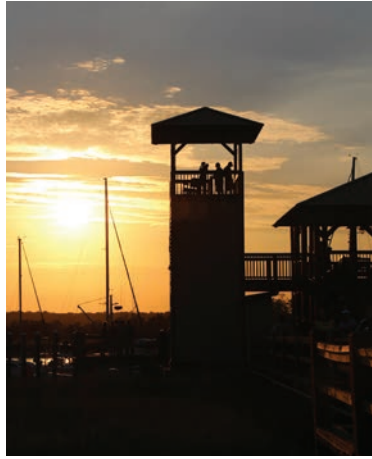
To minimize the impact of sea-level rise, Skidaway Island must look to strategies focused on flooding, wave forces, and storm surges. Among the strategies used, the following are some to consider:

- Research and understand new insurance requirements.
- Reestablish, maintain, and promote native vegetation along the coastline.
- Implement planning management tools such as setbacks, buffers, and zoning, plus development regulations and incentives.

- Improve access to education and information, particularly through coastal monitoring systems, advisory notices, and evacuation plans.
- Coordinate local plans with islandwide and regional strategies.
- Link outcomes of site analysis, vulnerability assessment, and resilience enhancements to the waterfront planning process.



For more information, see *After Sandy*, ULI's report on lessons learned from Hurricane Sandy, at www.uli.org/wp-content/uploads/ULI-Documents/AfterSandy.pdf.



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The two marinas offer a tremendous opportunity to expand the community's connection with the water.

significantly increases the likelihood that the island will experience periodic flood events.

Currently, the 100-year flood level for the area is set at 3.3 feet above mean high tide. According to projections prepared by Climate Central, a 17 percent annual likelihood exists of a flood event of greater than three feet in any given year between now and 2030. In addition, an 83 percent likelihood exists that the Skidaway area will experience a flood event that exceeds the 100-year flood level by 2030. These projections are already affecting the island with increased requirements for mandatory flood insurance on the island and higher costs for that insurance.

In view of this, the panel recommends that the Association, in coordination with other island stakeholders, establish a task force to monitor climate and sea-level issues and to create a comprehensive climate adaptation and resiliency

plan for island residents that supplements and enhances the existing emergency response and evacuation plans.

Improve and Enhance the Waterfront Experience

Two deepwater marinas acquired by purchase by the Association have become important amenities to the community, with one located on the north end, Landings Harbor, and another on the south end, Delegal Creek Marina. Significant investment has been made over the years with a focus on maintenance. The seawall at Landings Harbor has been replaced. The fishing pier was replaced in 2009. The wet slips are original and are scheduled to be replaced at the end of this year. In addition, replacement of the dry stack racks is scheduled for the end of 2016. The Association staff and engineers are currently reviewing new design

plans for this upcoming project. In 2010, major renovations were completed at Delegal Creek Marina, which included replacement of the walking pier and observation tower, totaling more than \$1 million.

Although the community does have these two marinas and one waterfront park, in the view of the panel, the waterfront is an amenity and marketing tool that the Association has failed to exploit fully. The panel recommends that the Association study and develop ways to use the waterfront to its full potential not only for the benefit of current residents but also as a marketing tool to attract future residents.

Improve and Enhance Educational Opportunities

An important component of any community is the educational opportunity it provides. This ranges from primary and secondary education to adult education opportunities and general educational programs and activities.

Approximately 1,000 children under the age of 18 live on the island, all of whom must leave the island to attend school. The original master plan for The Landings called for an on-site school. The panel believes that consideration should be given to establishing a school on the island to serve island residents. A school not only would serve existing residents but also would be an additional attraction to potential residents with school-age children.



With about 1,000 children under the age of 18 on Skidaway, the panel recommends that The Landings consider establishing a school on the island. Here, children learn about wildlife on the island.

Adult education and general education programs and activities have become an increasingly important component of community life. Although more than 100 clubs and organizations on the island cater to a wide range of resident interests, the panel is unaware of significant coordination of these programs. The panel believes the Association should consider hiring a coordinator to oversee and manage educational programming and community activities.

Establish a Unified Community Vision

The two principal stakeholders on the island are the Association and The Landings Club, each with its own board, constituencies, governance policies and procedures, objectives, and vision. During its visit, the panel became aware that natural tension periodically emerges between the two organizations because of the different governing philosophies inherent in the mission of each organization. In the panel's opinion, for the success of both organizations, they need to recognize their relationship is symbiotic in nature. The Association, through The Landings, provides potential members for the club, and the club serves as an important attractor for potential residents of The Landings. The success of each organization depends on the success of the other. In fact, a scenario where one of the two organizations could continue to thrive in the face of the failure of the other is hard to imagine. Given this situation, the two organizations must cooperate to advance a common agenda: the success of both The Landings and The Landings Club.

Planning and Design

AS NOTED IN THE PREVIOUS SECTIONS, the panel believes the key to a successful set of recommendations is understanding a community's character. Community character is defined by many physical and social elements, which inform planning and design. Of the physical elements, the primary components are the roadway transportation system and signage; the urban form (defined through street blocks, building form, and the natural environment); and the public realm, defined by all the places that are managed by the Association and club—that are used by the residents.

Building further upon the current market conditions and the outlined island objectives, The Landings should consider a series of planning and design enhancements, set priorities, and establish investment phases, then repeat these steps at intervals, as conditions change, to further align the interests of the Association, the club, and the company with the physical community.

Generational Change

This report has established that the residential population is changing, and the prospective buyers of today and tomorrow are not the same as the buyers of the past. The Association has recognized the need to adapt to this evolving target market. As noted previously, two major demographic shifts are affecting the market position of The Landings today: the aging of much of the resident population, and the younger, nonresident population seeking the security and amenities offered by The Landings. Among the latter, some may lack the financial resources or interest to make full use of some of those amenities, and they often have different preferences and requirements from preceding generations who initially came to The Landings. In response, a strategic repositioning of

many aspects of the continuing development, operation, and maintenance of The Landings should take place, so that prospective residents can pursue their interests in a supportive environment and to protect and enhance the existing values.

Nevertheless, the original concept of The Landings as being focused on the natural environment resonates strongly with new generations, too. The Association has wisely embraced the concepts and practices of sustainability. This guiding methodology is very highly valued by younger generations and is an important market differentiator that should remain as an integral part of The Landings' brand.

Identity and Branding of Design

The visual character of The Landings was deliberately designed to appeal to an earlier generation. Aside from its emphasis on the natural environment, everything about the community—from its landscape to its entry and street signs, from its amenity packages to its housing types, its architecture, and its design features—speaks to the needs and desires of an earlier generation and less successfully to the prospective buyers of today and tomorrow.

Aside from sustainable practices, the panel believes The Landings should undergo a full-scale rebranding program to develop a visual design identity that appeals to these new buyers. This rebranding program should address every aspect of the community that has a visual content, from entry signs and wayfinding systems to guard stations, from marketing literature to architectural character, from landscape materials to letterheads and uniforms.

Further, the panel supports the Association's comprehensive review of the existing architectural guidelines, with particular emphasis on updating colors and materials, but



Examples of signage and wayfinding around the property. The panel recommends that The Landings undertake a full visual rebranding program to appeal to a wider variety of potential buyers.

THE LANDINGS ASSOCIATION

also to address lot configurations, new building types, and the approval process. These need to be in sync with contemporary design preferences of a new generation of prospective buyers and streamlined to remove impediments and encourage rehabilitation and redevelopment of older homes.

Alternative and Replacement Housing Types

Many current residents seek to downsize their homes, move to one-story living spaces, and reduce their lawn maintenance. Many prospective residents seek modern styling with open floor plans, living spaces that flow together, updated materials and sleek finishes, and modern communications access. This new audience calls for the gradual renovation and replacement of much of the community's aging housing stock. A comprehensive and consistent strategy should be developed to address this need, perhaps in cooperation with leading homebuilders and developers.

As part of the architectural guidelines review, consideration should be given to how to consolidate lots to build larger duplex and multiplex units, how to reconfigure lots and open space where necessary to accommodate new building types, and whether to allow unconventional building types, such as clustered bungalows centered on a common open space. Consideration should also be given to improvements on individual lots to protect against flooding or other climate effects.

With respect to the current inventory of available home sites, the panel notes the scattered nature of these locations, which makes a universal approach more complex. The Association should seek opportunities to consolidate these holdings wherever possible, perhaps including land swaps or other mechanisms, so that new housing configurations or community amenities can be gradually introduced, particularly in aging neighborhoods.

Valued Amenities

Members of these newer generations have steadily lost interest in the pastimes of their parents, from playing bridge



The Landings' dog park.

to playing golf. Instead, these younger potential residents (and many older ones as well) have replaced these pursuits with active fitness recreation, including family activities, often featuring activities such as running, biking, and working out.

Although some potentially attractive amenities exist at The Landings, many, such as the dog park and the community gardens, are tucked away in remote areas that are not readily accessible to many residents. Others, such as the trail system, are often in conflict with golf cart paths and

result in confusion and hazardous exposure. Still others are walled off in the protected domain of the club facilities and are completely inaccessible to a large and growing segment of the population.

A compelling need exists for a program that develops and locates new amenities within neighborhoods and makes them accessible and visible for prospective buyers. Without such a program, the market for homes at The Landings will dwindle and, with it, the financial stability of the club and its offerings.

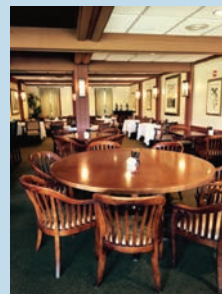
Connecting The Landings to the Greater Savannah Region

An amenity that is sorely lacking, especially in a community that is so large and remote from an urban center, is a residential transportation system. The county is a potential partner in developing a transportation alternative, but it should not be relied upon alone to develop a system that is both attractive and effective. The panel recommends the development and operation of a modern shuttle system that can be used for commuting to Savannah and the airport, as well as serving as an intracommunity connector.

Clubhouse Conditions

The Landings Club operates four clubhouses, each with its own restaurant. Although the club has done a good job in ongoing maintenance and upkeep for these clubhouses and the golf course facilities, the Marshwood Clubhouse, because of its age and design, no longer meets the

current and future market expectations. From the panel's perspective, this clubhouse will need to be replaced with a more modern structure that meets the needs of the future if it is going to continue to serve the community and support market requirements for club amenities.



Modern lifestyles are centered on electronic communications and technology. The Landings should consider implementing cutting-edge technologies such as comprehensive, community-wide Wi-Fi and video streaming, thereby enabling community bulletin boards, instant access to fire and emergency services, health care, and educational programs. This system could be used for continuing education and telecommuting and might also connect residents with outreach programs from the Savannah College of Art and Design, for instance. The entire community should be wired with power points established throughout the neighborhoods and open spaces.

Parks and Paths

The paths and trail systems should be enhanced and clearly marked and mapped, with one-mile exercise and stretching points and low-level lighting for safety. Many undeveloped and poorly maintained public land areas could be redeveloped as pocket parks or playground areas, providing gathering spots for residents.

These green-space amenities should be made more visible, with attractive seating areas and places to read or sit and check messages, meet others, and enjoy the outdoors. (Seeing residents use these spaces will be attractive to prospective buyers as they drive through the community.)

Gathering Places

The Landings needs places, other than club facilities, where residents can gather in small and large groups, where fairs, outdoor concerts and plays, art shows, and craft markets can be held. A centrally located community center is needed to house programs for residents, such as continuing education, fitness, cards, and public health events. A community programs director should be hired who books, schedules, and manages a variety of activities throughout the community.

Transitions from Golf

The panel learned that a high level of apprehension exists about the possible closure of one or more golf courses in the future. This has occurred in many other golf-oriented

communities, some of which have been addressed successfully and others less so. Many property owners are concerned that the value of their golf-course-frontage lots might be affected, which would be entirely justified if the resulting spaces are poorly maintained or left open and empty. Instead, the panel believes that a plan to address this eventuality should be undertaken as a proactive measure. Alternative uses could be considered that would retain the landscape, developing community amenities such as fair sites, community theaters, running and bike trails, soccer and sports fields, swimming facilities, and other amenities that are largely missing today for many residents.

Harbor Development

The two marinas, Delegal and The Landings Harbor, should be further developed. These potentially important amenities need more slip space, improved piers, and community food and beverage operations that would make them much more attractive and useful for all residents, as well as those who use boats and watercraft.

In particular, Landings Harbor might be redeveloped and expanded with an open, ungated access that has a grill on the ground floor, fine dining on an upper level, a pool, a playground, and other facilities that could attract patronage from the entire region.

Community Services

The Association should seek to partner with the owners of the Village, and perhaps a national property developer, to develop a master concept and development strategy for the Village and its surroundings. With a merchandising strategy in place, the partnership should actively seek qualified tenants that can help activate the space and diversify the offerings to match the needs of the communities inside and outside The Landings. This vital supplement to the community's welfare should become a powerful draw and a potentially huge financial success, while providing vitally needed services and amenities for residents. Alternatively, if such a partnership is untenable, the Association should take the initiative to develop these services in another location.

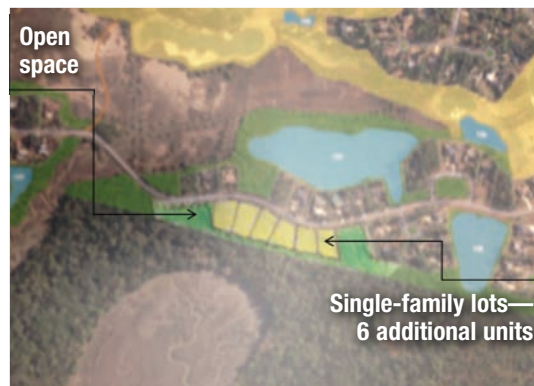
Planning and Design Concepts

As mentioned earlier in this report, the current state of development at The Landings has resulted in a largely complete community. Beginning with a master plan, the development reacted to market conditions and opportunities over time, and as a result, some of the parts do not correlate with one another as might otherwise have been the case. Furthermore, the locations of undeveloped or available building sites are fragmented and scattered over the entire area. This makes a comprehensive strategy for redevelopment much more complex than was originally the case. Moreover, improvements are likely to stretch resources, necessitating setting priorities and implementing upgrades and amenities in phases. The resulting action plan must not be regarded as an end result but instead should be revisited periodically to respond to current market conditions and available resources.

Updating the master plan is a necessary step to prompt community input and promulgate a guide for the future. However, to supplement the strategic steps for planning and design enhancements noted above, the panel believes suggesting some specific physical improvements is important. Some of these improvements represent options for specific sites. Others are intended to provide a model for a variety of locations.

Deer Creek

One potential development opportunity that the panel identified, in addition to the opportunities conceived by the Association and the club, is in the Deer Creek area.



A conceptual plan of a proposed location for additional single-family lots.

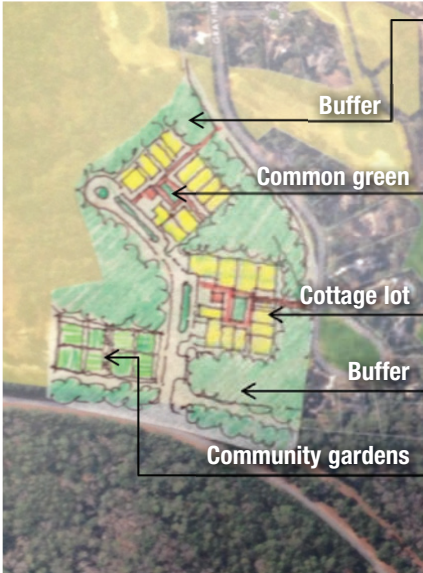
A sufficient amount of open space appears to exist to locate additional single-family lots that would allow enough depth for a lot as well as a buffer against the state park land and continue to allow pedestrian access to the park. The concept, pictured at bottom left, allows six additional single-family units.

Welcome Center

The panel also identified an important opportunity to locate a welcome center at the front entry of The Landings, as depicted in the conceptual illustration below. A welcome center located at a focal point of the property will facilitate prospective buyers' and first-time visitors' experience when visiting and touring The Landings. The panel understands that prospective buyers and first-time visitors often get lost while visiting The Landings. A welcome center at this location will allow the Association, the club and the company to better choreograph the message and identity of The Landings to the future buyers.



A recommendation for improving marketability and branding is to locate a welcome center outside the gate, with traffic-light access. The Landings Company's current office is tucked away in the property.



Several opportunities exist throughout the property to develop cottage lots, which would offer a new residential product. This example would add 20 cottages and a new front door to the community gardens.

An example of this approach is extremely well executed by the Cottage Company LLC of Seattle, Washington. Throughout the company's projects in the Pacific Northwest, communities are built around a common green as a focal point.

Community Garden Cottages

The panel envisions a new residential product for the island that could be used on a number of the available undeveloped parcels. These cottage products would provide not only new development that can help the club and Association generate revenue but also a means to better address changing consumer profiles. These types of units cater to both preretirement and retiree households. Design includes a common green, community gardens, remote parking, and high-quality architectural elements. The design will have to be tailored to reflect not only regional elements of Low Country architecture but also specific elements, depending on where such units are developed on the island. The organizing approach for these units should be addressed in the updating of any master plan.

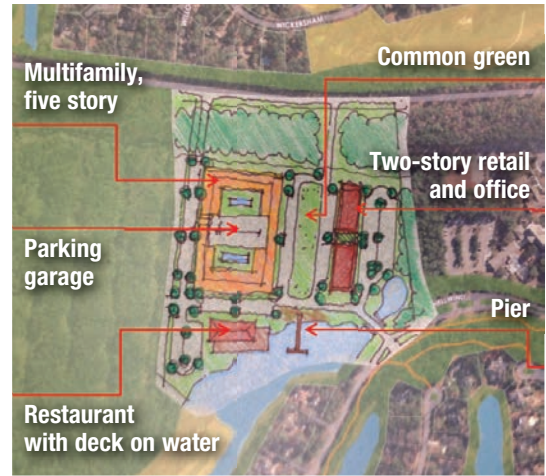
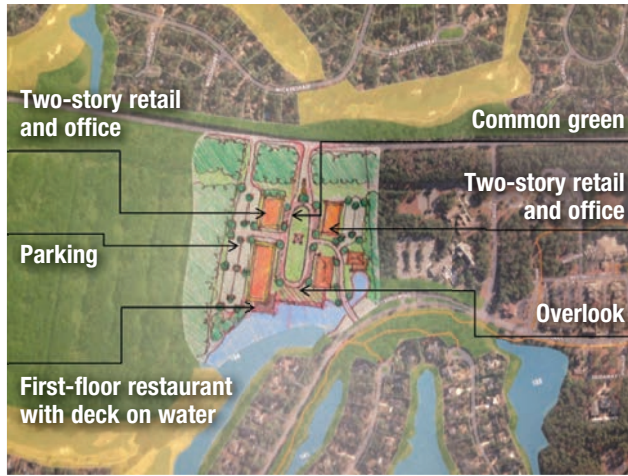
Spray Fields

The two large spray fields along McWhorter Road provide a substantial future opportunity for new development. Transforming these areas into property that can provide amenities and housing will require the Association and

the club to cooperate with the utility provider and the county to plan and develop an alternative system for waste disposal. The panel encourages the retention of the linear open-space buffer along McWhorter Road. Like other new development, an emphasis on natural systems and compatibility with adjacent uses should be at the forefront of any adaptive use of this property.

Potential reuse of two large spray fields nearby give The Landings an opportunity for future development on substantial land.





Above and above right: Two conceptual designs for new mixed-use development adjacent to the Village. Right: The Village is a commercial center located outside the gates of The Landings.



Mixed-Use Center

The panel has identified the property adjacent to the Village retail center as a location for several options for mixed-use development. As in the other locations along McWhorter Road, the existing linear buffer should be maintained. This is the one spot within The Landings that the panel feels a real opportunity exists to develop in a manner that will encourage repositioning as a multigenerational, engaged community. The panel suggests a strong emphasis organizing development around the existing water features and a common green that can become one of the island's community gathering places. Option 1 suggests two-story retail and office buildings with associated restaurant and community uses. Option 2 includes the

same elements as option 1 with an additional emphasis on residential in a multistory complex.

Marinas

One of the most potentially significant assets of The Landings is its marinas that define the community's name. As a key part of The Landings' identity, the marinas represent an opportunity for strategic investment to benefit the community and the public at large. Specifically, the panel identified The Landings Harbor Marina as a tremendous



The Landings Harbor Marina offers an unprecedented opportunity to meet one of the objectives outlined by the panel: enhancing the waterfront experience and improving connections to the Greater Savannah region.

opportunity to set the stage for the rebranding of Skidaway Island and The Landings.

Conceptually, this marina could be developed into an amenity that not only benefits the community but also benefits the public at large. The panel studied the possibility of connecting this marina to the county via a public access road. This concept would require close coordination between Chatham County and The Landings, to ensure compatibility as a public access road while maintaining the integrity of the gated community.

This redeveloped marina, as a concept, could feature formal and informal dining options, retail, and perhaps expand to include amenities such as a pool, further enhancing the identity of The Landings while becoming a destination on Skidaway Island and, most important, potentially increasing revenue and attracting potential buyers.

Golf Course and Open-Space Options

The Landings has been successful in formal gathering places with its placement of club and marina facilities, but the panel feels that for Skidaway, the establishment of less formal gathering places must be a much more deliberate exercise. The establishment of a common green at a new mixed-use center or the garden cottages represents an obvious opportunity for such uses.

The panel also suggests considering use of all or some of one of the golf courses for a variety of activities. Opportunities for additional new housing development could be combined with new passive open space and active open space for such activities. Current trends across the country include “glamping” (glamorous camping), additional fields for team sports, disc golf, washers and tailgate beanbag, “chuck wagon” night, movies in the park, musical shows, and tree-house camping. A new master-planning process should be the vehicle that the club and Association use to consider these approaches.



The panel recognizes that many in the community may find this approach difficult to entertain. A perception exists in the world of golf communities that any sign of weakness, such as closing a course, is troublesome. The fact remains that as a sport and a lifestyle, golf is contracting significantly. The panel feels that taking a proactive approach to reuse of golf course land will be seen as a strength rather than a weakness.

An example of conceptual reuse of one of the six golf courses on the property.

Implementation

STRONG LEADERSHIP FROM the Association and the club will be necessary to reposition The Landings as a multi-generational, engaged community. Cooperation between the Association and the club is essential in meeting this goal.

One suggestion that might be useful is what could be termed a “critical agenda meeting”: a regular meeting with rolling agenda items to help implement the suggestions of this report and the recommendations outlined in the updated master plan. Chaired by the Association, the meeting will include representation from the club and the company. The goal of each meeting is to identify issues and programs, evaluate action and progress, and assign responsibilities. The intent is to move the important issues on and off the agenda as quickly as they are resolved. It does not mean achieving unconditional consensus for each initiative or issue. It will require hard decisions on the part of the participating entities, who must listen to a diverse set of stakeholders and formulate actions that are in the best interest of The Landings.

The panel has a number of near-term and long-term suggestions for implementation of the panel’s recommendations.

Near-Term Actions

The panel suggests the following for completion over the next one to two years:

- Engage a third-party planning firm to organize and prepare a new master plan that establishes a unified development approach. Incorporate the island objectives into the new master plan. Incorporate the development proposals suggested in this report for the cottages, the Deer Creek site, the mixed-use site, the harbor, and the welcome center.

- Analyze all property in The Landings under the control of the Association or the company. Solicit participation by the club for appropriate changes to club-owned properties. Select near-term sites and product types to be developed. Analyze and monitor existing home sales and availabilities, and evaluate timing of delivery of sites.
- In the near term, develop a spray field recovery plan for long-term implementation.
- Create a marketing strategy for a broader target market. The Association will oversee a coordinated sales effort of sites and existing homes. This effort should include advice from The Landings Company, capture of third-party research, and evaluation of additional data regarding industry trends and the market.
- Begin planning and funding work on the new welcome center.
- Begin immediately working with the county on a concept for improvements to the road leading to the marina.

Long-Term Actions

For the longer term, the panel suggests that The Landings consider the following actions:

- Prepare housing and recreational options for eventual reuse of golf course(s).
- Ensure access to technology, which is as important to the 21st-century community as roads, water, and sewer. The next-generation owners and residents expect and need technology access. Actions to ensure this include the following:
 - Install wi-fi at all amenity locations, including parks, benches, ballfields, and buildings. Provide full

service to all residences through the Internet, community service videos, reverse 911 alerts, and public service announcements

- Expand the bird live video feed concept for the marinas, playing fields, natural sites, and other activities
- Establish a high-quality information technology department. Create and address a specific fee structure to accommodate added costs.

- Locate and install cell towers in locations to provide complete community coverage with all cell providers.
- Allocate cell tower revenue to technology improvements.

Conclusion

IN 2015, THE LANDINGS AT SKIDAWAY ISLAND is faced with some critical decisions about the future of its island community. The last 30 years have seen a variety of changes throughout the United States and the Savannah region in terms of the primary and preretirement/second home markets.

The panel's observation is that the original concept of an island community with an emphasis on golf remains intact. However, the panel recommends that The Landings must react and adapt to the societal changes that are sweeping

modern America and the market conditions that will affect real estate in the Greater Savannah region and Skidaway Island in particular. This report includes a number of suggested objectives that the Association, the club, and the company should follow to help in that new approach. The report also includes a number of specific organizational and physical actions and opportunities that can help begin to reposition The Landings into the multigenerational, engaged community that best addresses the demographic changes it will face over the next 20 years.



About the Panel

John M. Walsh III

*Panel Chair
Dallas, Texas*

Walsh is the president and founder of TIG Real Estate Services, Inc. (TIG). TIG has developed and redeveloped more than 2.5 million square feet of office and industrial buildings. TIG manages and leases a portfolio of almost 10 million square feet of office, industrial, and retail buildings on behalf of its institutional clients in four states. Before starting TIG, Walsh spent 17 years with Trammell Crow Company in various leasing, development, and senior management roles. During his tenure as development partner for the Northwest Dallas area market at Trammell Crow, Walsh was involved in the development of almost 5 million square feet, including leasing over 8 million square feet of office, industrial, and service center space.

A Dallas native, Walsh has served as chairman, director, and trustee of various business and charitable organizations, including Trammell Crow Employees Profit Sharing Trust, Valwood Improvement Authority, Carrollton Zoning Ordinance Board, Texas Commerce Bank, Valwood Park Federal Credit Union, and Sky Ranch Youth Camp. He has also served on working committees and boards for the city of Carrollton, the city of University Park, Highland Park Independent School District, and the city of Farmers Branch.

Walsh was an instructor at Brookhaven College for ten years and at the University of Texas at Arlington for two years, teaching business law to undergraduate students. He is currently a graduate school visiting instructor at the University of Texas at Arlington School of Architecture.

He has been a member of the executive committee of the Vision North Texas initiative since its inception in 2004. He currently serves as a member of the management

committee of North Texas 2050. He has been involved in numerous activities related to Vision North Texas as a speaker, sponsor, and participant.

Walsh is a leader and active participant in the Urban Land Institute. He has served as a volunteer member of numerous ULI Advisory Services panels and has participated as a speaker and presenter for ULI at the national, regional, and local levels. He is currently the treasurer of the North Texas District Council of ULI and recently completed over four years as its chair. In addition to his many other activities in ULI, he is currently serving as a trustee and serves on various committees, including Membership and Programs.

Walsh has made presentations to numerous real estate–related organizations throughout the country on such topics as underwriting, development techniques, financing obstacles and opportunities, marketing strategies, legal challenges, contracts, transactions, community development standards and real estate evaluation. He has been a member of the Texas State Bar since 1978, with a law degree from Texas Tech University School of Law. He earned his BS from the University of Texas, Arlington.

Mary Borgia

Newport Beach, California

President of the Borgia Company based in Newport Beach, California, Borgia specializes in forward-thinking advisory services for resort and residential community developments. With more than 35 years of active involvement in real estate marketing, management, and development, she applies the art and science of real estate to position communities to be meaningful for the target audience and value generating for the owner/developer. With expertise and talents that span a wide array of disciplines, economic sectors, and geographic experiences, Borgia brings an

insightful understanding of market dynamics, consumer trends, the built environment, and the development process to the table. She is passionate about creating value in live/work/play spaces while supporting wellness, fostering collaborations, and cultivating innovation.

Founded in 1986, the Borgia Company has completed assignments for a distinguished group of clients, including the Irvine Company, Hines Resorts, Hunt Realty, Leucadia National Corporation, Lowe Development Corporation, the Pivotal Group, Mitsubishi Corporation, Murray Franklyn Companies, the Nature Conservancy, the Pebble Beach Company, Port Blakely Tree Farms, and Valencia Company. Borgia has been the marketing force behind many successful and award-winning projects, including the Residences at Spanish Bay, Pebble Beach, California; Tumble Creek and Suncadia, Roslyn, Washington; the Terraces at the Vintage Club and the Reserve, Indian Wells, California; Snowcreek, Mammoth, California; River Valley Ranch, Carbondale, Colorado; and Stowe Mountain Lodge, Stowe, Vermont.

Borgia has been very involved in community and industry forums. She is a very active member of the Urban Land Institute, having served as council chair, council counselor for the Recreation Development Councils, National Program Committee, numerous Advisory Services panels, and special forums, and she is a trustee.

She has a BA from Knox College and an MBA from Pepperdine University.

Daniel Brents

Houston, Texas

Brents is an architect and planner with experience as an owner's representative on large-scale development projects. He is a full member of the Urban Land Institute and has served on 13 national and international ULI Advisory Services panels. His design and planning experience includes recreational communities, offices, retail and commercial development, hotels, mixed-use and entertain-

ment centers, educational campuses, and cultural and performance facilities.

He was the vice president for architecture and planning for Disney during the development of Disneyland Paris. In that capacity, he negotiated with French authorities and oversaw the planning and design of real estate development for the 4,800-acre, \$4.5 billion resort and mixed-use project. Previously, he was the lead master planner for Wintergreen, the 11,000-acre four-seasons resort in Virginia, and for South Shore Harbour, a 2,200-acre golf and marina community on Galveston Bay, near Houston.

More recently, Brents was a partner at Gensler, where he led the project design for the \$270 million Hilton Americas Convention Hotel in Houston and was the Harris County/Houston Sports Authority's development coordinator during the development of Minute Maid Park in downtown Houston. With experience as an owner/operator's representative as well as an architect, Brents is focused on achieving a dynamic balance of economic, environmental, and technical feasibility.

He is a registered architect, a fellow in the American Institute of Architects, and a member of the American Institute of Certified Planners. He has a bachelor's degree in architecture and a master's degree in urban design. He was recognized as an Outstanding Alumnus of Texas A&M University's College of Architecture and has served on the Dean of Architecture's Advisory Council. He maintains a consulting practice in Houston.

Greg Cory

San Francisco, California

Until 2009, Cory was senior vice president with Economics Research Associates (ERA). The ERA brand was absorbed by a publicly traded engineering company in 2007, the name extinguished, and the historic consulting lines largely abandoned. To rekindle the unique culture that was embodied in ERA, Cory founded his own company, Land Use Economics LLC (www.LUEllc.com), headquartered in San Francisco.

He is also founder of the Land Use Guild International (Landuseguild.org), a member-based consortium of seasoned, respected practitioners with similar backgrounds dedicated to sharing knowledge and resources, helping maintain standards, and providing peer review of each other's work as an additional service to clients. The guild represents the resources of four separate companies, a combined expertise of more than 130 years, and experience in over 50 international markets.

Cory has specialized in developmental economics throughout his career. Although he has dealt with a broad cross section of land uses, he has specialized in tourism and resort development because of the potential impact on lesser-developed economies. He has accumulated over 30 years' experience in analyzing the demand for hotels, resorts, and recreation-oriented facilities; has studied more than 450 resorts in over 45 international markets in depth; and is a frequent lecturer on resort economics and tourism.

While at ERA he served as head of the Resort Practice Group and was the corporate representative to the Caribbean Tourism Organization, the National Golf Foundation, and the National Ski Area Association. He also served as chairman of the Recreation Development Council of the Urban Land Institute and is a contributing author for two books on resort development published by that organization, specifically the *Resort Development Handbook* and *Developing Golf in Residential Communities*.

Philip S. Payne

Charlotte, North Carolina

For over 25 years Payne's primary focus has been the development, acquisition, rehabilitation, and management of middle-market (workforce) multifamily housing. He is currently the CEO of Ginkgo Residential, which was formed in July 2010. Ginkgo provides property management services for multifamily properties throughout the southern United States and is actively involved in the acquisition and substantial rehabilitation of middle-market multifamily properties.

From 2007 to 2010, Payne served as the CEO of Babcock & Brown Residential. Before joining Babcock & Brown Residential, he was the chairman of BNP Residential Properties Trust, a publicly traded real estate investment trust that was acquired by Babcock & Brown Ltd, a publicly traded Australian investment bank, in February 2007. In addition to his duties at Ginkgo, Payne is a member of the board of directors of Ashford Hospitality Trust, a NYSE-listed real estate investment trust focused on the hospitality industry.

Payne is a member of the Urban Land Institute, is a member of ULI's Responsible Property Investing Council (founding chairman), and serves on the board of advisers of ULI's Center for Sustainability. He is a member of Fannie Mae's Green Financing Taskforce.

He received BS and JD degrees from the College of William and Mary in Virginia. He has written for various publications and spoken at numerous conferences on a variety of topics, including real estate investment trusts, securities regulations, finance, and responsible property investing.

Robert A. Pilgrim

Dallas, Texas

Pilgrim is a senior vice president of Bury Inc., located in the Dallas office. Founded in 1984, Bury is a consulting firm for the built environment. Bury designs the communities in which we live and work, with a reputation built on a high-performance, service-driven culture. With locations in Texas, Florida, and Arizona, Bury's services range from landscape architecture, construction management, and transportation engineering to mechanical, electrical, civil, and structural engineering. Bury offers the resources, talent, and experience to serve almost every sector in the industry, and its experienced professionals thrive on crafting successful solutions for public and private projects across the country.

With more than 20 years in the planning and landscape architecture industry, Pilgrim's focus on planning is the perfect blend of his architecture and landscape architec-

ture background. His designs focus on the development of project character, site planning, and design visualization, and he prides himself on delivering attractive, cost-effective solutions for his clients. Pilgrim continuously aims to design socially and fiscally responsible products that engage the environment, the community, and the human context. His land planning expertise allows him to provide early feasibility analyses in conjunction with concept planning and results in designs that can be successfully executed in the real world.

Pilgrim has worked on a variety of urban and suburban projects located throughout the continental United States, Mexico, and the Caribbean; his projects include master-planned communities, golf course communities, urban resorts, and mixed-use developments. He is currently focused on a 300-acre urban resort redevelopment within Dallas and a 1,200-acre exclusive resort master-planned community located within the North Dallas growth corridor.

He has two bachelor's degrees in architecture and landscape architecture from Mississippi State University and is a registered landscape architect in the state of Texas.

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