

Navy Pier Chicago, Illinois



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Celebrate Chicago at Navy Pier

February 21–26, 2010
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An Advisory Services Program Report

Urban Land Institute
1025 Thomas Jefferson Street, NW
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About ULI

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 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 nearly 30,000 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 ULI's 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 400 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, brownfields 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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Thanks also go to Steve Haemmerle, executive director of development, and Marilynn Gardner, general manager of Navy Pier, and the others on the staff of the MPEA for their hard work both before and during

the panel visit. Without their involvement, this panel would not have been possible.

The panel would also like to thank the more than 80 stakeholders, citizens, business leaders, and community organizations who participated in this panel. With all the priorities and work facing the city, the MPEA staff, the business community, and citizens, these people were unsparing of their time and involvement.

Contents

ULI Panel and Project Staff	6
Introduction	7
Overview and History of Navy Pier	8
Near-Term Recommendations	9
Background and Context	18
Conclusion	31
About the Panel	32

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Introduction

At the request of the Metropolitan Pier and Exposition Authority (MPEA), the ULI Advisory Services Program convened a panel in February and August 2010 to assist in the creation of a vision for Navy Pier. Originally studied by ULI in 1989 and subsequently redeveloped using many of ULI's early recommendations, Navy Pier has operated successfully for two decades with only minor changes along the way.

At the time the February panel was held, the leadership of the MPEA and its very constitution as the governing body of Navy Pier were in flux. In spring 2010, the MPEA board was disbanded, and a trustee was appointed by the state legislature to manage the affairs of the Authority and craft a recommendation to the state legislature, the governor of Illinois, and the mayor of Chicago for long-term governance of Navy Pier.

In May 2010, the trustee contacted ULI and requested that the Advisory Services Program reconvene a panel consisting of some of the original panel members. Its task would be to formulate a set of near-term recommendations based on its earlier findings and consistent with the vision and guiding principles it had developed, but with a focus on near-term implementation, recognition of the current economic conditions, and an understanding of the limited availability of public and private capital. The panel

assumed that some portion of the October 2010 bond issuance by the MPEA could be used first to partially catch up on deferred maintenance and second for capital improvements. In addition, some private funding was assumed to be available for certain redevelopment options.

The August panel reviewed the earlier recommendations and concluded that, first, the MPEA should answer a call to action regarding the confirmation of its purpose and mission, focus on governance and leadership at the pier, and then immediately craft a long-term strategic plan that would guide Navy Pier through its next decade. Such a plan is a necessary step in beginning a redevelopment program that is consistent with the long-term vision for Navy Pier. Next, the panel sought to prioritize how the MPEA might spend capital dollars, as they become available, on a series of improvement projects. Finally, the panel offered its thoughts on several other issues that are less critical to the near-term action plan but still warrant consideration. The first part of this report outlines the near-term recommendations. It is followed by the vision for Navy Pier and the context within which the recommendations were made.

Overview and History of Navy Pier



“The Lakefront by right belongs to the people. It affords their one great unobstructed view, stretching away to the horizon, where water and clouds seem to meet.”

—Daniel Burnham,
1909

The 3,300-foot-long Navy Pier is located on the Chicago shoreline of Lake Michigan near the Streeterville area, close to Chicago’s downtown core. Envisioned as one of two grand piers by architect and urban planner Daniel Burnham and his associates in the influential 1909 Plan of Chicago, Municipal Pier #2 was built in 1916 to serve as a mixed-purpose piece of public infrastructure. It was renamed Navy Pier in 1927. Municipal Pier #1 was never built.

Throughout its nearly 100 years of storied history, Navy Pier’s fortunes have fluctuated widely as its uses have gradually changed. Since its inception as a major public lakefront amenity, the pier has had uses ranging from a temporary jail, a traffic court, and a Navy training facility to a campus of the University of Illinois to the site of renowned summer music festivals and celebrations. In its current incarnation as the city’s playground, Navy Pier features an iconic 45-meter-tall Ferris wheel, Chicago Children’s Museum, the Chicago Shakespeare Theater, shops, restaurants, and an exhibition hall. The pier and its facilities encompass approximately 50 acres of parks, gardens, shops, restaurants, and other entertainment attractions. Despite being Chicago’s number one tourist attraction, Navy Pier’s attendance is highly seasonal. Opportunities for rejuvenation are thus abundant.

In 1989, the city of Chicago retained ULI to evaluate the future use and programming of Navy Pier, which resulted in a series of recommendations. That same year, the state legislature created the MPEA

to manage and operate both McCormick Place—the city’s primary convention facility—and Navy Pier. Soon thereafter, the MPEA embarked on a multiyear \$150 million redevelopment of the pier. By 1995, the redesigned Navy Pier was introduced to the public, eventually becoming the mixed-use entertainment and meeting venue that it is today.

The redevelopment of the pier in the mid-1990s led to more than 15 years of successful operation. Navy Pier continues to be the largest single visitor draw in the city and in Illinois. To continue this success, in 2010 the MPEA requested that ULI assemble two panels. The first, held in February, provided the MPEA with a long-term vision. The second, held in August, provided the MPEA with recommendations on near-term strategies for redevelopment that would respond to the purpose and mission of Navy Pier and be consistent with the long-term vision.



An Advisory Services Panel Report

Near-Term Recommendations

The August panel focused on an actionable and realistic approach to redevelopment in the face of the severe global, national, and local economic recession. It identified call-to-action issues that require the MPEA's immediate attention and suggested five top priorities for how the MPEA might spend capital dollars as they become available. The panel also commented on several other issues that are less critical to the near-term action plan, but nonetheless important issues for consideration.

Call-to-Action Issues

The following issues are critical steps that the MPEA, the city, and the state must consider as they endure the current recession. The panel believes that addressing these issues now will put in place the steps necessary to implement a strategy for reinvestment and additional development at Navy Pier.

Confirmation of Mission and Purpose

It is essential for the MPEA to reaffirm the purpose and mission of Navy Pier in a formal, short, written statement. The mission should guide the actions of the MPEA, spell out its overall goals, provide a sense of direction, and guide decision making. It provides the framework or context within which strategies for Navy Pier are formulated. This confirmation exercise, while relatively straightforward, requires recognition and acceptance from a variety of entities and individuals. It does not require unconditional consensus. The MPEA must take into account the interests of a diverse set of stakeholders and ultimately formulate actions that are in the best interest of the community and the Authority.

Based on the interviews with stakeholders, the panel suggests starting with the following language: "Navy Pier's mission is to celebrate the vitality of Chicago by fostering a public place to serve the people of Chicago and present its cultural fabric to the world. The pier will be an eclectic mix of retail, cultural, recreational,

entertainment, and other appropriate uses organized in a self-sustaining business framework."

Governance

All across the United States, cities are afflicted with the "it'll do" disease. Because there are just too many other priorities, not enough money, and other things to do, a city lives with what it has and does the best it can. Since the time of Burnham and the 1893 World's Fair, Chicago has been known as a city that is not plagued by this disease. In recent years, Chicago has continued to be recognized as a city that demands excellence—in its parks, in public housing and the development of neighborhoods, and in libraries.

When Navy Pier was conceived and developed in the 1990s, it followed that tradition. Since then it seems that the MPEA has settled into "it'll do" mode, trying to do the best with the resources available. The pier continues to be successful, but it could be more successful and provide a better experience and a more dynamic front door to Chicago.

First, the pier needs a champion—a voice speaking and advocating only for Navy Pier. That is why the panel thinks that revamping the board structure that governs the pier is essential. The panel suggests that prominent civic and public leaders be asked to serve on a board for Navy Pier. It could take the form of a separate not-for-profit entity or an independent subsidiary of the MPEA, either having the ability to contract for certain management services from the MPEA. The panel believes that a mere advisory board is not a strong enough entity to play the role of a champion. In addition, the panel believes that the concept of a Friends of Navy Pier be internalized within a governing not-for-profit entity or developed as a partner with an independent subsidiary of the MPEA. The purpose of such a body would be to provide advocacy and fundraising for Navy Pier.

The institutional capacity to achieve additional development and manage day-to-day operations will require a new structure for the staff of Navy Pier and a new attitude about the potential of the pier. The CEO and staff need to have a clear mandate of responsibility and authority to carry out the mission. No effort will succeed without that mandate. Because the new developments on the pier will be iterative, the leadership will need to be consistent and entrepreneurial if it is to respond successfully to opportunities. As the Navy Pier changes, the staff needs to maintain a continuous commitment to quality service and particularly a strong commitment to excellence in design.

When dealing with the day-to-day challenges of running an operation as people intensive as Navy Pier, it is hard to think about next year. Yet for the pier to grow and the staff to develop, implement, and manage a long-term strategic plan requires committing significant resources, people, and time. A financial plan is needed to address the operating budget, deferred maintenance needs, and new capital investments over time, recognizing the tension between the three and the critical need to balance requirements.

Comprehensive Long-Term Strategic Plan

An important and necessary part of the renaissance of Navy Pier will be organizing for and preparing a comprehensive long-term strategic plan. It is essential that this plan incorporate the reason Navy Pier exists now and the vision of the future Navy Pier. The plan must be viewed as a strategic document that will evolve as the staff considers and reacts to changes in the market or opportunities that become available. The panel believes that the series of exercises associated with creating this plan is of paramount importance.

This strategic plan is not merely a typical physical master plan for land uses and facilities. Its broad-ranging components should include the purpose and mission of Navy Pier, guiding principles, business objectives, a vision that operationalizes the mission, a business plan and business case, a redevelopment program plan, a master land use and infrastructure plan, and a self-sustaining financial plan and capital budget. The preparation of this plan is a multifaceted exercise that requires focused leadership, professional advice, and a commitment from participants within the MPEA and its stakeholders.

Program Plan. The program plan, which should be based on the business objectives, should evaluate the market and determine the correct mix of retail, food, entertainment, cultural, and supporting event uses to support the purpose and mission of Navy Pier. It should evaluate space and consider several approaches so that the use of the limited space can be optimized to carry out the pier's mission.

Master Land Use and Infrastructure Plan. The master land use and infrastructure plan should fulfill the role of the physical master plan for the Navy Pier. The overarching goals and direction of this plan will have been established in the previous sections of the comprehensive long-term strategic plan. The master land use and infrastructure plan should establish clear districts for use types; recognize appropriate uses by geographic location; distinguish incompatible uses; identify pedestrian, vehicular, and water access to the site; establish open space and civic uses; and locate utilities and appurtenant facilities in appropriate locations.

Business Plan and Business Case. The business plan and business case should evaluate the various components of the master plan and consider development strategies for each. The evaluation should include an overview of the business objectives, a concept plan, development costs, project cash flows, an assessment of the sources of both public and private capital, timing, alternative implementation strategies and deal structures, an overview of the business risk and rewards, and other relevant factors that should be considered before the allocation of capital and other resources. Because of the unique nature of Navy Pier and its public purposes, the business case for implementing the various components of the master plan should remain consistent with the overall purpose, mission, and guiding principles of Navy Pier.

Self-Sustaining Financial Plan and Capital Budget. The financial plan and capital budget should address a multiyear period with regard to deferred maintenance, ongoing capital costs, and new projects. As an initial premise, the panel suggests that 10 percent of gross revenues be invested back into Navy Pier for deferred maintenance and new capital projects. That amount should be evaluated in greater detail during the development of the strategic plan.

Benchmarking: Metrics of Success. Benchmarking is a self-improvement tool that organizations use to compare actions, processes, and outcomes so as to identify examples or desired targets. It is a systematic process for identifying and implementing best or better practices. Each component of the comprehensive long-term strategic plan should include metrics that can be used as targets for benchmarking success. Depending on the vision and mission, the MPEA may consider benchmarking visitation levels, net profitability, spending per visitor, and other basic criteria to evaluate whether specific initiatives have been successful.

Sponsorship. Sponsors pay a cash or in-kind fee in return for access to the visibility and commercial potential associated with a property. Current sponsorship at Navy Pier includes signage, events, naming rights, and other opportunities. The fees amount to approximately \$2.0 million. Many entertainment venues, especially commercial attractions, generate more sponsorship revenue.

Appropriate components of the comprehensive long-term strategic plan should support the goal of improving sponsorship, to the extent that such sponsorship is consistent with the mission, purpose, and public expectations for Navy Pier. The panel recognizes that in Chicago outdoor signage, especially commercial signs on the upper stories of buildings downtown, is minimal. Any new sponsorship program must conform to the regulations, norms, and historical requirements that apply to the pier and its lakefront location.

Long-Term Location of Chicago Children's Museum

A year-round, child- or family-oriented experience has been an important piece of the Navy Pier experience since 1995. Chicago Children's Museum, with an annual attendance of 400,000 to 500,000 visitors, has filled this role. It helps to drive off-season traffic to the pier—and thereby guest spending on parking, food, and retail. The panel believes that an anchor of this nature should continue to be a core component of the product mix at Navy Pier.

Because of the significant nature of the changes in leadership at the MPEA, the panel suggests that the MPEA meet with the leaders of the board of Chicago Children's Museum and share with them the

vision for Navy Pier. If the board of the museum thought it valuable to engage in earnest dialogue about the possibility of remaining at Navy Pier, the panel would encourage the MPEA to explore how it might accommodate the museum's goals as part of the strategic planning process that has been recommended. Alternatively, Navy Pier should begin to evaluate other year-round, interactive, children- and family-oriented attractions. Given the amount of space currently occupied by the museum and the significance of this use, it is important for Navy Pier to have certainty about the museum's relocation plans and timing.

Top Five Capital Projects

One of the major challenges presented to the panel was to identify what new elements should be incorporated in the pier's offering. From its analysis of near-term requirements and opportunities and its understanding of the long-term vision, the panel believes that Navy Pier remains a financially stable operation that needs refurbishment and refreshing. The panel focused on elements that could work within a capital framework of \$50 to 100 million while also addressing important infrastructure-related issues. In the view of the panel, the most important priorities for investment, not ranked in order of importance, were the following:

- Deferred maintenance, facility updating, and landscaping;
- A children's anchor;
- The Great Chicago Wheel;
- The Chicago Shakespeare Theater; and
- Festival Hall.

Deferred Maintenance, Facility Updating, and Landscaping

First and foremost, any major development operation must protect its investment in its existing real estate assets. This not only includes day-to-day maintenance but also involves regular updating, remodeling, and refurbishment to keep the assets looking fresh and vital. The key priorities for infrastructure and facility investment should be deferred maintenance,

The Family Pavilion is a three-story, 150,000-square-foot building organized in an indoor mall format. Uses include the IMAX Theatre, Chicago Children's Museum, Harry Caray's Tavern, the Bubba Gump Shrimp Co. Restaurant and Market, a variety of smaller retail uses, and Crystal Gardens.



refurbishment or remodeling of the Family Pavilion, and landscape enhancements.

Deferred Maintenance. Briefing documents supplied to the panel noted that Navy Pier has been forced to defer certain major maintenance functions. The projected costs of the deferred maintenance should be verified and the necessary work should be undertaken. The panel suggests that the MPEA should invest first in the overall foundation of Navy Pier's operation, protecting the original investment made in the early 1990s.

Refurbishment or Remodeling of the Family Pavilion.

Although Navy Pier is well maintained on a day-to-day basis, the facility overall looks old and dated. During interviews with tenants and the community, the panel members heard the same thing: the facility has a 1980s look and does not feel fresh. This is especially true of the Family Pavilion. The panel proposes that while the MPEA looks at the programming strategy for the Family Pavilion, it should also undertake a refurbishment design effort that

- Cleans up the presentation of existing elements;



- Refreshes the guest circulation spaces to update them, making them more inviting;
- Considers a revitalized graphic package that presents a unified look and helps with the overall remodeling effort;
- Considers the design and merchandising strategy for the food court; and
- Is timed and coordinated with opportunities that are created with expiring leases.

Landscape Enhancements. In the February 2010 interviews, the panel members heard the same message from many constituencies: “We wish Navy Pier offered a more park-like feel!” In walking the pier during the August visit, the panel members felt that many areas would be dramatically enhanced by a substantial landscape and softscape effort, using mature trees extensively to soften the concrete feeling of key areas of the South Dock and East End. The panel views this enhancement program as an important element in making the space the “People’s Pier,” a place for relaxation, enjoyment, and access to Lake Michigan.

These improvements might not add immediate “sizzle” to the pier. However, the panel believes that until the MPEA addresses the key infrastructure and maintenance issues at Navy Pier, it will only delay work on important aspects of the pier’s long-term vitality— aspects that will cost even more to address at a later date.

Children’s Anchor

As indicated in the call-to-action issues, the panel believes that an interactive, year-round, child- or family-oriented attraction is a very important anchor for the Navy Pier experience. If the leaders of Chicago Children’s Museum thought it valuable to engage in dialogue about remaining at Navy Pier, the MPEA should work diligently with them to explore the possibilities. Alternatively, the MPEA should explore a variety of other child- or family-oriented attractions.

Possibilities include Kidzania, a 60,000-square-foot offshoot of the tremendously popular La Ciudad de los Niños attraction in Mexico City; Legoland Discovery Centre, a 50,000-square-foot concept owned by Merlin Entertainment; and attractions licensed by either Sanrio or Hit Entertainment, both of which are proposing to expand in the United States.

The panel believes that some alternative children’s anchor concepts may not fit in the space used by Chicago Children’s Museum. Therefore, as part of the strategic planning exercise and as discussions proceed with either the museum or another attraction group, the panel suggests exploring other sites on Navy Pier, possibly Festival Hall.

The Great Chicago Wheel

Chicago is the birthplace of the Ferris wheel, which was introduced at the 1893 World’s Fair. Today, the 45-meter wheel at Pier Park is used by about 750,000 guests each year and stands out prominently on Navy Pier. The panel believes very strongly that Navy Pier should be represented by a spectacular wheel. Ferris wheels are part of the rich history of Chicago, and the Great Chicago Wheel would become the icon for Navy Pier moving forward. The business model for the Great Chicago Wheel should be patterned after the London Eye, a highly successful attraction built on the River Thames for the 2000 Millennium. It offers stunning, unparalleled views of London and has become a must-visit destination for tourists. Each cabin on the Great Chicago Wheel should be an enclosed space, air conditioned in the summer and heated in the winter. Capacity in each cabin should be approximately 15 to 18 guests.

Navy Pier offers a variety of walking experiences with views of the city and Lake Michigan.



The panel considered a number of locations for the new wheel, but on the basis of a wide range of factors believes it should replace the existing Ferris wheel. This new attraction has several benefits:

- It creates a year-round attraction on the pier that will drive shoulder season and winter visitation (as the Eye does in London).
- It offers increased daily capacity, especially during the peak summer season.
- It could command a higher ticket price, because it would be considered a premium experience compared with the existing Ferris wheel.

The Chicago Shakespeare Theater

The Chicago Shakespeare Theater is an important element in the overall cultural fabric of Navy Pier and Chicago. The theater, which moved to the pier in 1999, has built a vibrant complex that presents live shows as well as workshops and other outreach programs. In 2009, it held 600 live events in its existing facility (a 500-seat courtyard-style theater and a 200-seat studio theater). It has developed a business

strategy to expand its outreach by building a new theater of approximately 950 seats, with rehearsal rooms, workshop space, and desperately needed office space. However, the theater needs capital investment from outside sources to enable the development and construction of an expansion to its “campus.”

The panel believes that the MPEA should consider funding some portion of this expansion as part of the Navy Pier capital program. Doing so would provide several benefits:

- It would add approximately 300 new events on the pier, attracting an additional 200,000 to 250,000 visitors to the pier.
- It would build on Navy Pier’s contribution to the arts community in Chicago.
- It would allow the theater to expand its nationally recognized arts-in-education program, Team Shakespeare.
- It would further strengthen what has become a very important tenant at Navy Pier.



The interior of Chicago Children's Museum.

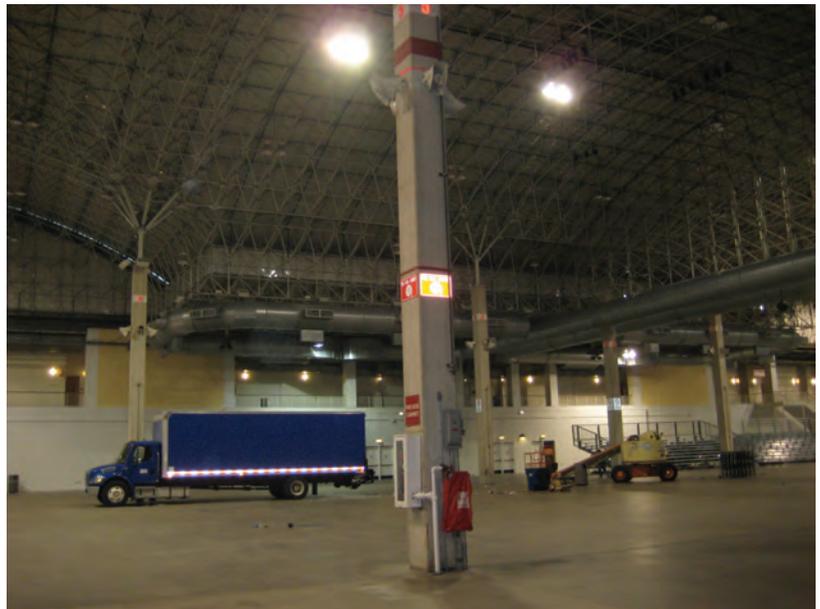
The panel believes that the concept of building this expansion in the general area occupied by the Skyline Stage makes sense, with the theater positioned more to the north and east end of the site, allowing for the development of a larger open plaza on the south side of this part of the pier's second level. The panel believes that the opportunity for viewing the Chicago skyline from Navy Pier is one of the pier's major competitive advantages, and the views of Chicago from this part of the pier are spectacular. The panel proposes the following key uses of this plaza:

- Possible queuing or staging area for the Great Chicago Wheel at the west end of the area vacated by the Skyline Stage,
- Outdoor park setting, and
- Outdoor dining experiences serving all visitors, especially guests of the Chicago Shakespeare Theater and the Chicago Wheel.

Festival Hall

At 170,000 square feet, Festival Hall is an underutilized space. Some of its uses are popular and meaningful for Navy Pier visitors and tenants (for example, Winter WonderFest), but as a convention and trade show facility, it is programmatically inconsistent with the Navy Pier experience. A variety of alternative uses for Festival Hall have been discussed and should be considered.

Live-Performance Venue. The MPEA has received preliminary expressions of interest from entities interested in exploring the possibility of repurposing part of Festival Hall into a 4,000-seat performance venue, primarily to host concerts. Assuming a suitable agreement can be put in place, the panel believes that, if the facility were to be used 150 to 200 days annually, the incremental foot traffic could create demand for additional food and beverage and retail locations. Because some visitors never venture beyond the Family Pavilion, the panel also believes that a live-performance venue is one of the better opportunities to psychologically extend or enlarge the perception of Navy Pier. Parking, which is absolutely essential for a live-performance venue, is located close to the western end of Festival Hall; this parking is ideally suited to accommodate visitors' use of the west bay of Festival Hall.



Ice Skating Rinks. Ice skating rinks, which have relatively low capital operating cost requirements, could help create additional reasons for year-round visits and generate further incremental foot traffic at minimal risk. A number of use scenarios could be developed, ranging from seasonal use in the center and eastern bays of Festival Hall to a more permanent arrangement in the center bay that would leave room for periodic exhibition space or construction of other alternative uses.

Festival Hall is a large under-utilized space that can accommodate a variety of temporary uses.

Sports Courts and Facilities. Similarly, sporting facilities that feature changeable flooring (accommodating basketball, tennis, skateboarding, volleyball, and the like) could provide the ability to host adult leagues, local tournaments, and competitions. The consideration of such uses should be part of the larger comprehensive long-term strategic plan. The courts and play area would have to be coupled with other uses, because the panel is not convinced that on their own they would be effective or the best uses.

Children’s Anchor. The importance of the children’s anchor attraction has already been established. Given its adjacency to parking, Festival Hall could be suitable for a larger children’s destination attraction.

Retail Shops and Restaurants. Any of these programming ideas could affect the need for associated retail shops and restaurants, as well as the type and mix of such shops and restaurants. Quality restaurants with a successful regular clientele could begin acting as draws in their own right.

Other Issues

A variety of other site issues require consideration by the MPEA. Although not as critical as the call-to-action items and the top five capital projects, these issues are nonetheless important and need attention in preparing the comprehensive long-term strategic plan. These issues need to be considered sooner rather than later.

Traffic-Pedestrian Interface

Pedestrian traffic conflicts with vehicular traffic at the entrance to Navy Pier. To improve traffic flow and guest safety, the panel recommends resolving the conflicts by revising the circulation as highlighted below:

- Relocate the transit terminal to the southern portion of Gateway Park;
- Relocate the taxi staging stand area to the southern portion of Gateway Park; and
- Redirect parking access to Streeter Drive and East Grand Avenue.



The refurbished food court is essential to the future health of Navy Pier.



Excellent water access for both boaters and visitors is essential in any redevelopment plans for Navy Pier.

Crystal Garden

The MPEA asked ULI to provide recommendations for alternative programming approaches for the Crystal Garden. The panel found the Crystal Garden to be a very inviting space (especially during the cold winter months) that works for special events. That said, the panel believes that potential programming alternatives cannot be developed or analyzed until the MPEA has resolved the critical programming issues with the Family Pavilion, including the tenancy of the Chicago Children’s Museum. After the MPEA has a better understanding of the tenants that may be adjacent to the Crystal Garden, it can then develop a programming approach.

Hotel

A boutique hotel of 200 to 400 rooms has been discussed as either a possible reuse of part of Festival Hall or an adjacent feature to it. A hotel was in fact a use suggested by the 1989 ULI panel. This panel likewise believes that a hotel is an appropriate public use for Navy Pier and that it is consistent with the pier’s public purpose. Combining the operation of the Grand Ballroom with a hotel catering/sales function could be fruitful, but the panelists are not convinced of the viability of a hotel as a business at the pier. The panel suggests that the MPEA evaluate this option further as part of its strategic plan, discuss possible options with developer-operators, and, on the basis of market feedback, pursue an opportune strategy for a hotel.

Water

Navy Pier possesses two key competitive advantages that are unmatched in the Chicago market. One is the spectacular views of the city skyline: Navy Pier is the only place in the city from which most residents and visitors can see these views. The other is access to Lake Michigan: Navy Pier is the only place in the city from which most residents and visitors can go out on the water. The panel suggests that the MPEA create places on the pier where the dock is lowered to bring people closer to the water level (taking into account the fluctuations in the lake level over time). These water-level platforms could include small green areas as well as small cafés, giving visitors a more intimate relationship with the water and further supporting the mission of Navy Pier as the “People’s Pier.”

On-Pier Transit Funding Opportunities

The panel recommended that the MPEA investigate the availability of funds for the construction of a people mover or tram to transport pedestrians from one end of the pier to the other. Such a system would be located on the North Dock, either at dock level or on an elevated platform at the second level.

Background and Context

“Navy Pier is and should remain primarily a public place for the use and enjoyment of Chicago-area residents and visitors to the Chicago region. Its revitalization should reflect and build upon its unique location in the Lake, its historic significance to the City and the region and its historic architectural silhouette.”

—MPEA concept plan, 1990

The Panel’s Assignment from February 2010

Against the backdrop of Burnham’s enduring 1909 vision and the objectives established by the 1990 MPEA concept plan, the sponsors asked the panel to advise the MPEA on how best to redevelop Navy Pier to become a world-class destination tourist attraction.

When the panel met in February 2010, the MPEA asked the panel to consider five core issues as part of its effort to understand Navy Pier and assist in establishing a vision for it:

- *Accommodating an Increase in Visitor Volume, Especially in Shoulder Seasons:* Consider carefully and think broadly about the amount and location of parking that serves Navy Pier, now and in the context of increasing visitation and executing on a redevelopment plan for the pier. Evaluate the alternatives that have been suggested over time, which range from keeping the current parking amount and configuration in place to removing it from Navy Pier entirely and placing it in an underground landscaped structure in Gateway Park. Evaluate and think through ways to alleviate congestion and minimize the conflicts between vehicles and pedestrians in Gateway Park. Evaluate the relevance of various forms of mass transit in getting visitors to Navy Pier and as a way to provide on-pier transit.
- *Repurposing Underutilized Facilities:* Consider the most appropriate uses for Festival Hall, recognizing that although the facility is underutilized, activities take place there that are important generators of visitation for Navy Pier. Recognize that the market for convention and meeting space is significantly different than when the facility was originally constructed. Consider whether the North Dock should remain the primary vehicular and service access point. Think through moves that can activate this part of the pier. Consider

alternative uses for either the Skyline Stage or the space that it currently occupies.

- *Enhancing Space for Existing Core Business:* Consider the tenancy of the Family Pavilion and its current condition, and recommend an approach to redevelopment there. Evaluate and consider any opportunities to increase visitation to the Crystal Garden. Consider opportunities to add or change amusement attractions in Pier Park, either to increase revenue or to extend the season, and specifically think through the possibility of adding a larger, year-round Ferris wheel somewhere on Navy Pier. Consider opportunities to increase the utilization of the Grand Ballroom.
- *Revitalizing and Enhancing Open Public Space and Waterfront Access:* Think through ways that Gateway Park can be enhanced as a green space or destination park without building any permanent structures, how to incorporate green concepts into new development, and how to improve access to the waterfront.
- *Branding:* Recommend ways that Navy Pier can be branded to sharpen its message and reflect its position in the marketplace.

The Panel’s Findings

Today, Navy Pier contains many elements, but its constituent parts could be described as the following:

- Gateway Park, the landscaped entrance to the pier, which has transit, vehicular, and pedestrian activity;
- The Family Pavilion, featuring Chicago Children’s Museum, the IMAX Theater, and retail, restaurant, and food court offerings;
- The Crystal Garden, an enclosed park;
- Pier Park and the Ferris wheel, presenting amusement opportunities;

- Skyline Stage, an outdoor performance venue;
- Chicago Shakespeare Theater;
- Festival Hall, which provides 170,000 square feet of event and conference space;
- The Grand Ballroom, a historic structure used for special civic and private events;
- Parking structures;
- The South Dock, the linear walkway along the southern edge of the pier; and
- The North Dock, a long service drive on the north side of the pier.

Design

The Headhouse and Grand Ballroom have been properly recognized as excellent architectural bookends of the pier, reflecting Chicago's long-standing commitment to high-quality design; however, the pier's other architectural elements are somewhat uninspired. There appears to be no overarching theme, and many regard the architecture as a hodgepodge of disparate concepts.

Clearly, the water is the unique and distinguishing characteristic of Navy Pier. Although the South Dock Street experience provides a positive connection to the water, most of the pier's interior elements face inward, away from the water. The interior experience lacks an airy, open feel. Many have described the overall space configuration as claustrophobic. In addition, the pier does not adequately take advantage of the views available to the north, east, and west. In particular, the spectacular views west toward the city skyline are a missed opportunity. The docking of large ships and boats adjacent to the South Dock also impedes meaningful pedestrian views of the water and the skyline.

From a circulation perspective, the lack of good north-south travel paths inhibits a strong pedestrian experience. Even the most intrepid pedestrian would find it challenging to circumnavigate the entire pier. The pier also lacks substantial and significant open-space venues, which inhibits opportunities for outdoor festivals, and other open-air activities. In addition, the North Dock is primarily a service drive and does not engage the water well or offer an appealing pedestrian experience.

Offerings

Overall, the variety and diversity of the offerings at Navy Pier, many of which are popular with the public, seem disjointed. Many of the concepts are tired and, at a minimum, need significant rethinking and reinvesting to make them popular with more potential patrons.

Many interviewees commented that they visit the pier for particular events but do not linger to explore other offerings. In other words, the program elements do not appear to generate spill-over activity for each other. Many potential customers view Navy Pier as a great family attraction but not that appealing for those who do not have children. Many Chicago residents do not view the pier as their own; however, they do consistently regard it as a proud symbol of Chicago.

Some interviewees stated that one of Navy Pier's weaknesses is that it has a dual identity as a venue that provides open spaces for the public while featuring a wide range of revenue-driven offerings. The panel sees this mix as one of Navy Pier's strengths. No place else in Chicago offers visitors the chance to interact with the water while enjoying wonderful views of the city's marvelous skyline in a public setting.

Above all else, Navy Pier has a seasonal quality. During the warm months, it is an extremely active space, drawing vast numbers of people to stroll, eat, entertain themselves, and take in the breathtaking water views. However, during the fall, winter, and early spring, the pier is not well used—meaning that most of its revenue must be generated during a very short period.

The panel noted the following reactions to specific program elements:

- Chicago Children's Museum is a strong draw for families.
- The retail area and food court is tight and claustrophobic. The retail offerings are generally low-priced and directed mostly at tourists.
- The Crystal Garden is a nice amenity, but some question the utilization of the space.

- Pier Park is appealing to children, but it is a bit crowded and cluttered.
- The Ferris wheel is an obvious draw and a critical symbol of Navy Pier.
- Skyline Stage is too small and, being open to the elements, too seasonal.
- The Chicago Shakespeare Theater is a real asset that should be built upon.
- WBEZ, a public radio station, is clearly an asset for the city, but although it is consistent with the pier's civic purpose, it seems disconnected from Navy Pier's overall entertainment focus.
- In Festival Hall the need for meeting and convention space may be redundant because of the recent expansion of McCormick Place.
- The Grand Ballroom is an impressive and recognizable architectural element but is underutilized. Although some of that underutilization is clearly a reflection of the economy. The dock outside the Ballroom should never be closed; it should always be available to the public.
- The on-pier parking structures provide a necessary amenity to assist in the attraction, retention, and success of the offerings at the pier.

Branding and Marketing

The Navy Pier brand is not well defined in the eyes of consumers. To some, the pier is strictly a family destination; to others it is a public gathering place. This diffused definition complicates, if not inhibits, the ability to run a focused and effective marketing program.

Accessibility

The panel observed that the cost of parking (\$24.00 on weekends) is nearly prohibitive. In many ways, the high parking cost is a barrier to entry for Navy Pier—effectively an admission price. This is a potential constraint on significant growth in attendance, given that driving is the way most people access Navy Pier.

The connections to Navy Pier, in particular across Gateway Park and from Michigan Avenue, are problematic. Reaching the pier from these locations requires walking past some surface parking lots, under Lake Shore Drive, and through the sizeable Gateway

Park. These obstacles force visitors toward two primary choices: drive to the pier and pay the high cost of parking, or visit a more accessible and affordable attraction. Thus, the absence of a strong transit option and the lack of a unifying streetscape experience from Michigan Avenue may inhibit the potential to significantly increase the visitation of the pier.

Operation

The operations team at Navy Pier can take credit for a very clean experience. Despite the substantial amount of deferred maintenance, the operations team does a great job of maintaining the space available to it at the pier. The staff is engaging, enthusiastic, and passionate about the pier.

In interviews, vendors and larger-scale consumers of the Navy Pier experience complained about the high cost of doing business on the pier. In addition, retailers and other vendors expressed concern about the MPEA's lengthy and cumbersome procurement and leasing process. Lower costs and fewer administrative hurdles could attract more events, more customers, and more retailers.

A Vision for Navy Pier

Chicago is the home of big, audacious ideas, matched only by the deeds and accomplishments of her people. Legendary favorite son Daniel Burnham captured the attention and imagination of the world by daring to dream and having the courage and fortitude to make that dream a reality. In keeping with Navy Pier's illustrious history, the panel suggests recommendations on the caliber of the original plan, to develop a new vision for the pier.

Many times in the world of place making the "big idea" focuses on architectural solutions. Other times it focuses on a major new destination element that becomes the focal point of the place. For Navy Pier, the panel concluded that the big idea required a more holistic approach, one that encompassed the pier as a gathering place for people and as a renowned tourism destination. The big idea must combine architectural and programming solutions. Most important, it must create a clear identity for both Chicagoans and tourists, an unambiguous brand for Navy Pier.

In interviewing the many stakeholders, the panel members heard a continual theme: Navy Pier should reflect Chicago, because after all, this is the people’s pier. Chicago is one of the world’s most beautiful and exciting cities. It is a unique combination of community, culture, and commerce in the heartland of America. Yet the panel could not find a single location in the city where the many attributes of Chicago are on display in a central locale that offers culture, sports, dining, shopping, entertainment, music, and the wonderful asset that is Lake Michigan. The panel sees Navy Pier as that location, a place where locals and tourists alike can “celebrate Chicago.”

Taking that as a new vision, “Celebrate Chicago at Navy Pier” creates a unifying identity and serves as a focus for the programming recommended in this report. The panel envisions the creation of “neighborhoods” on the pier—outdoor hubs surrounding newly designed parks or plazas. The activities throughout these neighborhoods would incorporate elements that reflect all that is Chicago.

To foster the development of this unifying identity, the panel envisions architectural changes that will create a more inviting environment at Navy Pier and the development of iconic architecture that reinforces this celebration of Chicago. The rest of this report expands on these ideas and offers recommendations on how to revitalize Navy Pier and reinvent this important Chicago asset as a place that expresses the historic vision of its creator and caretakers.

Market Context

To assess the market potential of Navy Pier, the panel reviewed and analyzed a variety of data. The unique nature of the site, its buildings, and its location demand a special set of uses. Given the size of the site, the long-term success of redevelopment will require multiple uses that support each other, enabling the pier to change over time as market support for different types of uses ebbs and flows. Around the country, strong developments and communities—those that attract and retain users, tenants, and residents over several years—benefit from combining commercial, residential, arts, and other uses in a high-quality environment that encourages pedestrian activity and interaction. On the basis of its market review, the panel believes that the Navy Pier site is well suited to sustain a mix of uses that both captures current mar-

ket interests and builds on potential markets. This mix mitigates the risk of failure for any one use.

Current Challenges. Visitation at Navy Pier grew steadily after it reopened in 1995. Estimated visitation in 1995 was 3 million. By 2000 that number hit 9 million, well exceeding predevelopment forecasts. Since 2003, however, visitation has slipped gradually. Likely because of the economic impacts of the recession, visitor volumes declined to 8.3 million in 2008; 2009 saw that level decline another 3.1 percent, to just under 8 million. Visitation figures for 2004 to 2009 are presented in figure 1.

“Tourist” Nature of the Pier. Interviewees made numerous comments about the “tourist” nature of Navy Pier. According to visitor intercept studies performed by the MPEA, most visitors to Navy Pier are Chicago-area residents. During 2009, fully 73 percent of visitors originated in the metropolitan region, with

Figure 1
Navy Pier Visitation, 2004 to 2009

Year	Estimated Attendance (Millions)
2004	8.8
2005	8.6
2006	8.8
2007	8.4
2008	8.3
2009	8.0

Source: MPEA; ULI.

Figure 2
Visitor Origin, December 2008 to December 2009 (%)

Origin	December 2008	March 2009	July 2009	December 2009	Average
City of Chicago	57	39	37	54	43
Chicago Suburbs	27	34	30	30	30
Other U.S.	13	26	28	13	24
Foreign	2	1	5	3	3

Source: MPEA; ULI.

Figure 3
Navy Pier Visitor Characteristics

Average Age	36 years
One Group Member Under Age 17	51%
Group Size of Three or More	72%
Women Visitors	58%
Average Income	\$67,400
Income Under \$40,000	27%
Income \$75,000 and Over	21%
Spent More than Three Hours	89%

Source: MPEA; ULI.

Figure 4
Leisure Person-Stays, Seasonal Variation

Season	Share of Leisure Person-Stays (%)
Winter	20
Spring	25
Summer	34
Fall	21

Source: Chicago Convention & Visitors Bureau; ULI.

27 percent coming from other domestic or foreign locations. Even though overall visitor volumes increase dramatically during the summer, this mix of visitors does not change materially.

Lack of Repeat Visitors. Perhaps one of the most significant take-aways from the MPEA’s ongoing work is that visitors do not come to Navy Pier frequently. According to the surveys, 67 percent of visitors come to the pier only once or twice a year. This small number of visits is significant, given the variety of attractions on Navy Pier and the high concentration of area residents in the overall number of visitors who use the asset.

Figure 5
Visitor Origin by State, 2006 to 2008

Origin	Share (%)
Chicago Region	26.2
Remainder Illinois	5.0
Wisconsin	16.4
Indiana	13.0
Michigan	8.6
Ohio	4.2
California	3.7
Iowa	2.9
Georgia	2.7
Missouri	2.6
Texas	1.7
Total	87.0

Source: Chicago Convention & Visitors Bureau; ULI.

Note: Based on trends from 2006 to 2008. Chicago region based on 2008 data only.

The public nature of the pier is also evident in the makeup of typical visitors, in terms of their diversity in age, family size, income, and ethnicity (figure 3). This diversity is both an opportunity and a challenge, in that Navy Pier has become many things to many people.

Low Ebb during Off-Peak Season. As part of the market review, the panel also examined overall statistics on Chicago visitors. According to the Chicago Convention and Tourism Bureau, 44.2 million people visited the region in 2008. The majority (74 percent) came for leisure-oriented purposes. Seasonal visitation for leisure is split surprisingly evenly for most of the year, with a dip in winter, as would be expected. The breakdown of the leisure market based on 2008 data is shown in figure 4.

Figure 6
Leisure Visitors by Origin

City of Chicago	
Total Visitors	44.2 million
Total Leisure Visitors	32.4 million
Percentage Leisure Visitors	74.0%
Non-Chicago	
Total Leisure Visitors	23.9 million
Percentage Leisure Visitors	73.8%
Total Navy Pier Visitors	2.74 million
Navy Pier Visitor Penetration	11.5%
Chicago Area	
Total Leisure Visitors	8.5 million
Percentage Leisure Visitors	26.2%
Total Navy Pier Visitors	5.56 million
Navy Pier Visitor Penetration	65.0%

Source: ULI.

Regional Attraction. The origin of Chicago’s leisure visitors is also interesting. The city draws strongly from Midwest markets, with almost 79 percent of visitors coming from the midwestern states listed in figure 5. It is important to note that 26 percent of these visitors originate from within the greater metropolitan region.

As part of its review, the panel analyzed these visitor statistics and related them to the visitation levels at Navy Pier. Looking at the leisure segment and at visitors from outside the Chicago area, Navy Pier appears to capture about 11.5 percent of current visitation from beyond the region. Figure 6 shows highlights of this analysis, along with an estimate of visitor penetration within the region.

Redevelopment Program

The goals of the redevelopment program are intended to create a year-round destination for tourists, while providing a gathering place that Chicago-area residents can call their own. The panel based the program for the future of Navy Pier on the mission statement and seven supporting guiding principles:

- *Create a year-round destination:* Add elements that allow for and attract winter visitation. Expand spring and fall programming. Enhance events and festival programs for the months from fall to spring, incorporating the entire pier.
- *Expand the visitor experience:* Create new venues and activities for visitors. Create gathering places. Surround the visitor with spectacle and vibrancy. Attract more upscale dining and retail. Drive repeat visitation. Add “hot button” elements to pull visitors to the east along the pier. Appeal to all age, gender, and income demographics. Add vibrancy with unique light, water, and other sensory experiences. Build on the “Celebrate Chicago” theme and its diversity.
- *Change the perception of Navy Pier:* Move from a diverse set of venues to a critical mass of integrated activity anchors. Generate word of mouth to renew excitement about the diversity of attractions for the community.
- *Implement a financially balanced approach to pier activities:* Provide sufficient commercially profitable activity to enable sustainable long-term reinvestment, to make continued entertainment and event programming available to all visitors, and to create some cash flow for special needs.
- *Support green infrastructure on the Pier:* Support the utilization and showcasing of green technologies and practices in the redevelopment plan.
- *Improve access to the water:* Make the pier the primary location in Chicago for people to get close to the water including, wherever possible, specific locations where people can actually touch the water. Improve leisure boater access to the pier and allow additional mooring space along the north side of the pier.

- *Improve transportation infrastructure and on-pier circulation:* Maintain the existing parking capacity on the pier. Remove conflicts in Gateway Park between pedestrian and vehicular traffic. Support options for usage by visitors who do not arrive by car. Open up pedestrian choke points on the pier. Provide weather-protected pedestrian corridors that are visitor-friendly and have pulling power. Develop and maintain activity nodes proximate to the on-pier parking to create acceptable walking distances for visitors. Allow for pedestrian and other forms of transport forms to circulate north-south throughout the pier, not only east-west, and provide for a circular flow.

Visitor Experience

The vision for Navy Pier is twofold: a year-round destination for tourists and a gathering place that Chicago-area residents can call their own. The goal of the redevelopment program is to increase traffic and revenues during off-peak periods and maximize visitor spending during the busier summer months when the physical capacity of the pier may limit demand. To accomplish this, the panel recommends a mix of flexible, year-round spaces that in combination create a cohesive destination with a singular identity:

- Retail and dining,
- Flexible space and programming,
- A cultural anchor,
- A children's anchor,
- A sports anchor,
- A maritime anchor,
- The Great Chicago Wheel,
- The Grand Ballroom and East End, and
- A hotel.

Retail and Dining. Retail and dining space could be expanded to approximately 300,000 square feet in the long run, connecting the individual components, extending visitors' length of stay, and integrating the overall experience. Experiential anchors envisioned by the panel would serve as drivers of visitation and demand for retail and dining. Destination restaurants can fill this role, as well. They should be supplemented by a mix of specialty, impulse, and other retail and

dining uses. This mix might include 70 percent dining and entertainment, and 30 percent merchandise, including several higher-end dining options. Combined, these facilities create a natural social gathering place and form the core night-time entertainment draw of the new Navy Pier.

Flexible Space and Programming. The current configuration of Festival Hall, at 170,000 square feet, creates a barrier between the attractive east end of Navy Pier and the more programmed spaces to the west. The approximately 450,000 guests who attend the Bank of America Winter WonderFest in December demonstrate the potential for seasonal programming at Navy Pier. Because Festival Hall is underutilized, the panel recommends exploring other uses; however, the panel feels strongly that a significant amount of indoor space for flexible seasonal programming must remain a core component of the Navy Pier program.

Cultural Anchor. The Chicago Shakespeare Theater, with two spaces of 500 and 200 seats, hosted 600 performances last year. It has plans to expand by adding a third space of approximately 950 seats, enabling it to host larger traveling shows more effectively. The theater features programming for schools, families, and adults that has broad socioeconomic appeal. Expanding on its success and providing complementary amenities for it is vital to the ability of Navy Pier to continue growing its off-season audience.

Children's Anchor. Providing year-round draws for school groups and children and their families is critical to Navy Pier's success outside the peak summer months. Located in the Family Pavilion, Chicago Children's Museum hosts almost 500,000 guests each year and serves as an experiential anchor for Navy Pier. Although it could most certainly continue to serve as the key child-focused experience anchor, the museum is working on plans to relocate from Navy Pier. If the museum does indeed relocate, it will be essential to replace this attraction with a family attraction in some form.

Sports Anchor. Sports are part of the fabric of Chicago, and the legacy of sports in Chicago should be showcased at Navy Pier. Not simply a walk through the history and the importance of sports to Chicago, the sports anchor can be a place to celebrate individual sporting events, as well as sports in general, through participatory experiences—real or simulated. The



sports anchor could be a startup museum or attraction or possibly a tenant that has successful current operations in other markets, with a program refined to reflect the excitement and enduring legacy of sports in Chicago. The plan allows for a potential year-round ice and hockey rink.

Maritime Anchor. One of the distinctive characteristics of Navy Pier is its position on Lake Michigan. The redevelopment program should reflect this by embracing the water and the lake’s importance to Chicago. An experience that tells the story of Chicago’s relationship with Lake Michigan could be appealing to residents and tourists alike. It could take the form of a maritime museum or even a commercially oriented attraction. Expanding this idea further, a participatory indoor maritime experience could be complemented by a historically significant vessel docked at Navy Pier that offers tours and seasonal programming.

The Great Chicago Wheel. Chicago is the birthplace of the Ferris wheel: it was introduced to the world at the 1893 Chicago World’s Fair. Today, the 45-meter-high wheel at Pier Park is used by about 750,000 guests each year. It stands out prominently on Navy Pier; unfortunately, it does not provide a comfortable, conditioned ride during the off season. The panel feels very strongly that Navy Pier should be represented by a spectacular wheel with enclosed and conditioned cabs so that the ride can be used

year-round and to enhance the visitor experience. It is part of the rich history of Chicago, and the Great Chicago Wheel could become the icon for Navy Pier.

Grand Ballroom and East End. The Grand Ballroom serves as a high-end catered-events space which, from time to time, extends out onto the eastern portion of Navy Pier. This extension can create challenges in operating the pier as a visitor attraction, because it entails closing portions of the public area. The panel feels strongly that the East End could be a public area that offers regular programming (at least during the peak season) to increase traffic, make this area more appealing, and maximize overall on-site capacity. These goals could be accomplished by expanding the number of live performances that occasionally occur in this area or developing an evening spectacular (water, land, or barge-based). Alternatively, this space could remain a more quiet and reflective part of the Navy Pier experience with the introduction of landscaping to soften the character of the East End.

Hotel. A boutique hotel of 200 to 400 rooms should be considered as part of the Navy Pier program. The intent would be to increase usage of the Grand Ballroom, create an on-site market, and provide a strong year-round day and night use for Navy Pier.

The Grand Ballroom provides one of the pier’s most spectacular interior and exterior spaces.

Design and Planning Constructs

Navy Pier represents a wonderful blend of the past and the future. Burnham, his associates, and the city fathers had the foresight to dream of a public, mixed-purpose piece of infrastructure more than 100 years ago. However, parts of the pier need to be better utilized and could benefit greatly from better pedestrian connections and more inspiring architectural elements and open space. Since 1995, the pier has reestablished itself as a popular public amenity and remains the leading attraction in Chicago. Biweekly fireworks shows continue to be among Navy Pier's most popular draw. Both the Ferris wheel and the thousands of lights that illuminate the pier at night are significant icons that attract visitors from near and far. Taking these challenges and strengths into consideration, the panel sees enormous capacity to reinforce the character and charm of Navy Pier while accommodating the next phase of its rebirth.

The panel believes that certain practical considerations related to operating a destination attraction are an important component that should remain in any redevelopment plan. The panel chose to retain the facility's basic organizing concept, keeping service and vehicular access along the north side while maintaining the primary pedestrian circulation along the south side. The decision to maintain the primary visitor circulation along the south side acknowledges that commercial activities are likely to be more successful if they are oriented toward sunlight and open views.

The existing parking structures provide an excellent opportunity for nearby, enclosed parking for the Family Pavilion, Pier Park, Chicago Shakespeare Theater, and activities that use the Festival Hall space. It is ideally located for a live-performance venue in Festival Hall.



Parking and Transportation

Parking on Navy Pier is provided in two relatively continuous enclosed locations. The easternmost parking is located beneath Festival Hall and west of the Grand Ballroom; it has a turnaround for valet service. The covered pickup/dropoff location is accessible by the Navy Pier trolley service. This location has about 380 enclosed surface-level parking spaces. The larger western parking area, located more centrally, combines a large structured parking area beneath Pier Park with a parking tower. Approximately 1,200 spaces are provided at this location. In addition, overflow parking is available off site, two blocks west of Lake Shore Drive on Illinois Street; it provides up to 700 spaces of covered parking.

The 1,600 spaces on Navy Pier are filled to capacity only 50 times per year for less than 2 hours at a time. There is significant seasonal variation in the use of parking, with high demand during July and August (66,000 cars) and low demand during January and February (26,000 cars). Parking usage on the pier has declined steadily over the past ten years, from 800,000 vehicles in 2000 to 512,000 in 2009. Despite the decline, parking revenue continues to be positive at \$7 to 10 million per year, with an average gross revenue of \$20 per vehicle.

Parking Alternatives

In order to establish an appropriate set of guidelines and principles related to parking, the panel consciously considered several alternatives for replacing or expanding Navy Pier parking.

Nearby Parking. Among the alternatives for nearby parking are the following:

- *North Slip Parking:* The options of placing parking in the North Slip by using a barge or partially filling the slip have potential environmental, regulatory, and cost issues.
- *Gateway Park Parking:* Underground parking similar to that at the Museum of Science and Industry could provide significant parking immediately adjacent to the front of the pier. Although it would be close and help relieve some at-grade traffic conflicts at the park entrance, this option is very expensive (a minimum of \$45,000 per space) and has potential environmental and regulatory constraints.

- **Western Off-Site Parking:** Available public parking along Illinois Street could be assembled and interconnected with Navy Pier transit service. The advantage of this alternative is that it creates a message, telling potential visitors that they have arrived at the Navy Pier experience.

Conclusions about Parking. The panel strongly recommends that the parking supply on the pier remain at 1,600 spaces, because parking convenience is important to the viability and use of programmed attractions on Navy Pier.

Parking on the pier is the most economical structured parking option, in contrast to the alternatives of adding parking in the North Slip or underground at Gateway Park. The barge alternative would provide traffic efficiency improvements, but it would also create potential operational issues. Locating parking below ground is expected to be very costly—a minimum of \$45,000 to 50,000 per space. A floating parking lot, depending on the capacity of the barge, could cost from \$10,000 to 20,000 per space, but operating costs may be significant.

Access to Navy Pier

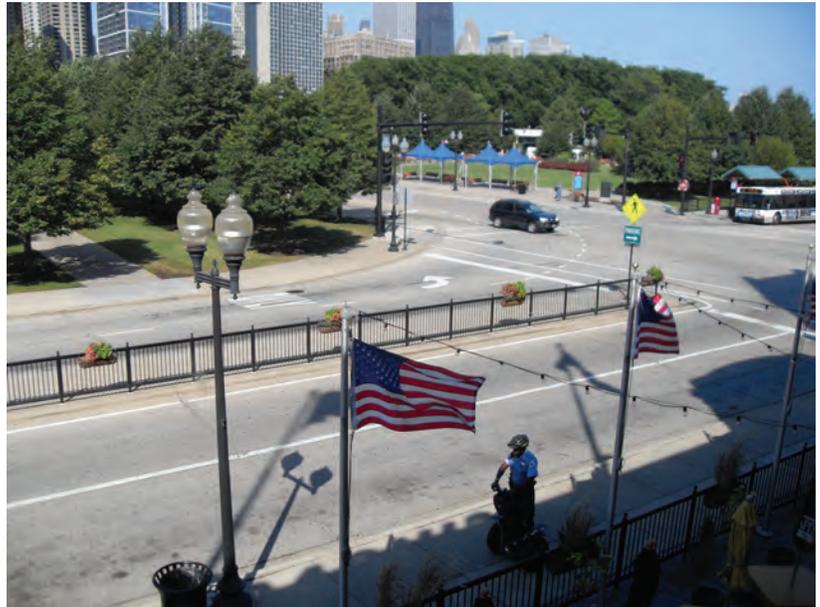
Access to Navy Pier is provided by surface roads, sidewalks, and public transportation systems.

Roadway System. Access to Navy Pier has certain constraints because of the limited frontage to land connections and the proximity of Lake Shore Drive. The constraints concentrate automobile, transit, taxi, bicycle, and pedestrian conflicts within a small access activity zone. Entrance and exit movements in many cases create critical “event surge” demand patterns.

A July 2009 survey conducted by the Metro Chicago Information Center showed that 47 percent of Navy Pier visitors arrive by automobile, 26 percent use transit, and 22 percent walk or take a taxi. Of the visitors who drove to Navy Pier, 74 percent parked on the pier and 12 percent parked west of the pier.

This confluence of arrival modes creates three high-conflict areas:

- The intersection of the North Dock and the eastern portion of the Gateway Park circulation roadway,
- The pedestrian crossing from Gateway Park to the South Dock with the circulation roadway, and



- The East Illinois Street intersection with the northbound Lakeshore Drive off-ramp and Streeter Drive.

The most critical conflict point occurs at the intersection of the North Dock during the exit surge after major evening events, such as summer fireworks. During these times, exiting vehicles conflict with pedestrians who are crossing the west end of the North Dock to access the transit terminal and with left-turning taxis that have picked up visitors at the front of Navy Pier. Eliminating this pedestrian conflict could greatly improve parking discharge operations and transit concurrence.

A second conflict area is located at the intersection of the pedestrian crossing from Gateway Park to the South Dock with the circulation roadway, adjacent to the Headhouse. During the arrival and discharge of Navy Pier visitors, pedestrians are required to cross a four-lane roadway; that crossing conflicts with taxi and automobile access to the Navy Pier parking. Redirecting parking access on Streeter Drive and East Grand Avenue would eliminate the greatest conflict for pedestrians. Conflicts can also be minimized by reducing the width of the Gateway Park circulation roadway adjacent to the Headhouse.

The road system at the western end of Navy Pier can often be overcrowded during peak visitation times. Eliminating the vehicle-pedestrian conflict at the northern parking service drive area will greatly improve parking discharge from the pier and the overall visitor experience.

A third conflict point is the East Illinois Street intersection with the northbound Lake Shore Drive off-ramp and Streeter Drive. Except during major events, vehicles accessing Navy Pier parking from the off-ramp and East Illinois Street are directed to use the Gateway Park circulation roadway. Limiting the circulation roadway to transit and taxi vehicles and directing all other vehicles along Streeter Drive to East Grand Avenue would reduce pedestrian conflicts at the Navy Pier entrance. It would also improve control of pedestrians crossing the intersection of Lake Shore Drive, Illinois Street, and Streeter Drive.

Collectively, these conflict issues could potentially be resolved by

- Relocating the transit terminal to the southern portion of Gateway Park,
- Relocating the taxi staging stand area to the southern portion of Gateway Park,
- Redirecting Navy Pier parking access to Streeter Drive and East Grand Avenue, and
- Reducing the width of the Gateway Park circulation roadway.

Public Transportation

In recent years, numerous transit-related initiatives that affect access to Navy Pier have been studied and discontinued. These initiatives include the Chicago Department of Transportation (CDOT) circulator trolley, the Navy Pier trolley, water taxis, and the Carroll Avenue Transitway. An important element in enhancing transit utilization by Navy Pier visitors is improving connectivity to development nodes west of Lake Shore Drive such as Michigan Avenue, the Loop, Union Station, and other activity areas, as well as off-site parking.

Because vehicle parking on Navy Pier is recommended to remain at 1,600 spaces, emphasis should be placed on attracting visitors to use off-site parking and transit options. These two emphasis areas could synergistically support the effectiveness of improving access for and release of vehicles exiting the Navy Pier parking garages.

These transit initiatives could be implemented in a near- and long-term phasing plan:

- *Near-Term:* In the near term, the panel recommends that the CDOT collector operation be resumed. Previous CDOT collector operations have successfully provided an integrated connection to other downtown activity areas. Identity-wrapped buses will increase visitors' understanding of convenient alternatives for accessing Navy Pier. Another near-term transit improvement involves upgrading the existing Navy Pier trolley operation with a larger, more user-friendly vehicle. Such vehicles could also increase transit capacity during major events. To improve transit operation and bicyclist movement, consideration should be given to dedicated bus and bike lanes on East Illinois Street and East Grand Avenue. The dedication of a bus/bike lane on East Illinois Street would have the disadvantage of reducing peak-hour traffic accessibility to Lake Shore Drive but would calm traffic speeds along a pedestrian- and transit-friendly gateway to Navy Pier.
- *Long-Term:* As a longer-term transit improvement, a dedicated fixed guideway or rubber-tired transit alternative should be constructed on Illinois Street. It should be compatible with the Carroll Avenue Transitway initiative. New floor-level, narrow-width transit vehicles are very user-friendly and can attract visitors. The guideway for the connector or dedicated bus lane should run on Illinois Street under the Lake Shore Drive bridges and continue to Navy Pier, as a way to enhance visitor mobility at the East End.

Long-Term Opportunities to Enhance On-Pier Transit

The highlight of current transit service on Navy Pier is the free rubber-tired trolley service that operates daily during the peak season and on weekends year-round along the North Dock. The trolley provides limited transit service to nearby off-site locations. Three taxi dropoff and pickup points exist at the pier. Immediately adjacent to the northwest corner of the pier is a bus transit terminal that serves seven CTA bus lines, which interconnect with the Chicago transit system. Water taxi service is provided at two locations: lake service at the southwest corner of the pier and river service at the southwest corner of Gateway Park.

Several alternatives are available to enhance pedestrian mobility:

- Provide a people mover or dedicated transit that travels the length of Navy Pier, with off-site connections to public transportation and key parking locations;
- Provide escalator service for vertical and horizontal movement on the pier; or
- Promote water taxi shuttle service between designated activity nodes.

People Mover. A people mover would improve mobility along Navy Pier. The pier's 3,300-foot length is an impediment for some visitors, limiting their experience of the pier to the western activity segment. An on-pier people mover such as an enclosed moving sidewalk would need to be located on the second level on the north side of the pier to reduce pedestrian conflicts within the limited width of the walkway on the dock level.

A long-range improvement alternative would enhance both on-site pier mobility and transit accessibility. It involves a fixed guideway or dedicated bus lane connection between Michigan Avenue, a western Gateway parking facility, and Navy Pier. The potential increased transit access to the pier and connectivity to downtown transit systems such as the "L" and Central Station would create an enhanced user-friendly experience.

Escalator Service. Pedestrian movement between different levels of the pier needs to be easy. An escalator system would move a larger number of people than an elevator system. As part of the comprehensive long-term strategic plan, appropriate high-traffic vertical movement options should be considered.

Water Taxi Service. Water taxi service to Chicago River destinations could be enhanced for all-weather mobility to and from the pier as well as to connect activity nodes along the pier. Water taxi service can move significant visitor volumes to and from the pier and other river destinations.

Implementation

Implementation of the panel's recommendations centers on successful action in three broad focus areas. The following section summarizes those three areas.

Comprehensive Long-Term Strategic Plan

As stated earlier, an important and necessary part of the renaissance of Navy Pier will be organizing for and preparing a comprehensive long-term strategic plan. It is essential that this plan incorporate the reason Navy Pier exists now and the vision of the future Navy Pier.

Team of Professionals

The panel believes that the MPEA will require the assistance of a multidisciplinary team of professionals to assist it in creating and implementing a strategic plan under the direction of a designated development executive who reports directly to the CEO/Trustee and advises the general manager of Navy Pier. As part of the strategic plan, various implementation strategies should be evaluated.

An important element of the implementation strategy will be how Navy Pier is reintroduced to consumers. Establishing a branding strategy in the minds of consumers requires a strong, focused marketing effort. The long-term success of this effort will rest largely on how well management defines the redeveloped Navy Pier in the minds of consumers and engagingly introduces them to the new, exciting experiences that await them.

As redevelopment efforts are completed and launched, a targeted marketing effort will be necessary to reinforce Navy Pier's image in visitors' minds. This effort will require a steady funding source. One source that has major growth potential is sponsorship. Given the number of visitors that the pier attracts today and the additional numbers that will be generated by a redevelopment effort, the panel suggests that the MPEA mount a focused sponsorship effort. The panel believes that revenues from sponsorship can be increased significantly.

The existing 45-meter wheel at Pier Park could be replaced with a larger year-round wheel.



Financial Parameters

Current visitation to Navy Pier is 8 million a year. The panel sees an opportunity to increase this number through a combination of enhanced summer activity and greater use during the evening, and shoulder and off seasons. The panel's review suggested that the potential exists to increase annual visitation in the long term to at most about 12 million with the right mix of attractions, event programming, and on-pier parking.

During the panel's analysis, it became clear that various competing development options have significant revenue implications. Perhaps the most significant one arises from the conflicting goals of keeping Navy Pier a public place while maximizing its ability to generate significant net revenue. Redeveloping Navy Pier in a way that is consistent with its public and cultural purpose limits its revenue-producing capacity.

Based on its review, the panel believes that the best use of Navy Pier is to continue as a public place for Chicago residents and visitors. There are significant opportunities to expand visitation during both the summer and the off-season months.

Navy Pier should operate in a financially sustainable manner. Additional revenue from redevelopment should be sufficient to provide for the ongoing maintenance and long-term redevelopment needs of the pier. Navy Pier should be capable of operating as a stand-alone entity on a break-even basis after funding a capital reserve account. To the extent that Navy Pier can operate at a surplus, it will be in a position to further enhance public amenities and provide additional entertainment and events for the enjoyment of the pier's visitors. It will be difficult to generate any significant surplus cash flow for an asset of this scale with this number of public benefit uses, many of which require annual operating subsidies.

Conclusion

The ULI panel has laid out a set of near-term and long-term recommendations consistent with the purpose and mission of Navy Pier. Navy Pier is the one major public asset on Lake Michigan's shore that Chicagoans can call their own. It is the people's living room, the point of arrival, the front door, the image-maker, the picture postcard. Its image and identity have waxed and waned throughout its storied 100-year history. During the past 20 years, the MPEA and the city have made some great strides; however, as a result of changing tastes and economic conditions, Navy Pier

currently faces some challenges. Although some see stability in holding fast, standing still is not an option. Overcoming the challenges will require great collaboration and patience, and no small amount of imagination. The near-term recommendations must be pursued with some urgency and resolve, while the long-term recommendations must be evaluated and refined. The MPEA and the city must embrace the heritage of Chicago's visionary planners. They should aim high, in the spirit of Chicago's pioneering forefathers, and proceed with confidence to reinvigorate and improve upon Navy Pier now and put it in a position to remake itself on an ongoing basis.



About the Panel

Daniel C. Van Epp

*Panel Chair
Las Vegas, Nevada*

Van Epp is one of the development world's most respected leaders. He brings more than three decades of experience to his work, providing senior-level strategic and operational consultation for large-scale real estate development projects nationwide. At Newland Communities, the nation's largest privately held developer of master-planned communities, with more than 60 projects in 14 states and 20 markets, he is responsible for capital markets and acquisitions leading the company's efforts to broaden its capital base and acquire projects. His consulting projects for the Van Epp Companies have included Union Park, a 10 million-square-foot, \$6 billion, mixed-use community taking shape in the heart of downtown Las Vegas, and Tradition, a 5,000-acre, 15,000-unit, master-planned community in Biloxi, Mississippi, that uses traditional neighborhood design concepts.

Until 2007, Van Epp was executive vice president and chief operating officer of Newland Communities. In this capacity, he assumed overall responsibility for operations of the company nationwide and led Newland through a change program focused on improving operational efficiencies after a period of sustained growth. He had joined Newland in 2005 as president of its Mountain Region, overseeing strategic planning and early development for Union Park.

From 1995 through 2004, Van Epp managed the development of Summerlin in Las Vegas, a colossal 22,500-acre master-planned community that was the country's best-selling and standard-setting master-planned community for a decade. As senior vice president for The Rouse Company and president of its affiliate, The Howard Hughes Corporation, he played a major role in establishing Summerlin as the city's premier address, offering an unparalleled quality of life in southern Nevada.

Previously, at Hughes, Van Epp led teams that developed land for 21,000 homes, sold property valued at more than \$1 billion, and developed more than 2 million square feet of office and retail space in Summerlin and throughout Las Vegas. He was also instrumental in forging progressive public/private partnerships with Clark County and the city of Las Vegas to facilitate expedited infrastructure development. He made environmental stewardship a high priority for the company, working closely with conservation groups and utilities to promote conservation practices. Van Epp held a leadership role in a valley-wide development coalition that drafted the nation's toughest self-imposed dust and air quality rules. Under his direction, Summerlin became the first community in southern Nevada to adopt water conservation guidelines for all new homes.

Van Epp began his corporate real estate career in 1982 with HHHunt Company, where he served as president of community development through 1995. He was responsible for acquisition, planning, development, and operations of HHHunt's three master-planned communities.

A highly sought-after speaker, presenter, and real estate development expert, Van Epp continues his leadership role in the industry through his affiliation with ULI. He is a three-term trustee of ULI and vice chairman of its Executive Committee, as well as past chairman of the Community Development Council.

Van Epp has received numerous industry and charitable awards. He is the founder of Summerlin Children's Forum, a nonprofit organization that provides scholarships and educational enhancement grants to Summerlin schools. Van Epp is a trustee and former chairman of the University of Nevada Las Vegas Foundation.

As a college freshman at Virginia Technical University, Van Epp launched a home-building company in Blacksburg, Virginia. He graduated cum laude in 1979 with a BS degree in building construction.

Walter Bialas

Alexandria, Virginia

A seasoned real estate professional with more than 25 years of creative problem solving experience in consulting, banking, and development, Bialas has had a long career in evaluating real estate throughout the United States, gaining comprehensive knowledge of all the major markets and property types. He has particular strength in quickly assessing market and location dynamics and their implications for project feasibility.

Before becoming an independent consultant, Bialas oversaw Madison Marquette's research function as part of its investment and acquisitions team for retail properties across the country. Previously, he established an internal market research group at PNC Bank. As vice president of the research group, his main role was to provide market research and due diligence in support of the bank's commercial underwriting process. Bialas provided custom research to evaluate unique market dynamics, assess location issues, evaluate the impact of competitive projects, and test the reasonableness of pro forma assumptions. Projects he evaluated ranged across the entire country and covered all property types. Bialas's particular analytic strengths focus on retail and affordable housing.

Before joining PNC, Bialas spent ten years with the national consulting practice of GA/Partners at Arthur Andersen in Washington, D.C. While a senior manager there, he advised clients on the market and financial feasibility of proposed projects nationwide.

Bialas received his bachelor's degree in urban studies from Albright College in Reading, Pennsylvania, and his master's degree in city and regional planning from Catholic University in Washington, D.C. He is an active member of ULI and served on the Pittsburgh District Council's executive committee. In addition, he is a member of the International Council of Shopping Centers and the current chair of its North American Research Advisory Task Force.

Daniel Brents

Houston, Texas

Brents is a planning and urban design consultant, working on projects in the Middle East, Asia, Latin America, and the United States. He was previously a partner at Gensler, where he led the firm's global Planning & Urban Design practice while managing an architectural studio and leading large-scale projects. Following his retirement from Gensler, he assisted the design firm TVS in establishing an international urban planning practice. His recent work includes the design of cultural and civic centers, hotels, convention centers, mixed-use and entertainment centers, and educational campuses in the United States and abroad.

Previously, Brents was the vice president of Architecture and Planning for Disney's real estate development group at Disneyland Paris, the 4,800-acre, \$4.5 billion resort, entertainment complex, and mixed-use project. Brents was the Houston Sports Authority's development coordinator for the \$250 million downtown Minute Maid ballpark. He has been a consultant to Ross Perot, Jr.'s Hillwood Development on multiple projects, including the Victory Park entertainment and mixed-use complex in downtown Dallas. His experience includes work on resorts and urban redevelopment and mixed-use projects worldwide. In the U.S. Navy, at the Great Lakes Naval Training Center, he served as a resident officer in charge of construction.

Brents is active in ULI and has served on numerous Advisory Services panels. He is a registered architect, a Fellow of the American Institute of Architects (AIA), 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. Brents has been recognized as an outstanding alumnus of Texas A&M University's College of Architecture and serves on the Dean of Architecture's Advisory Council.

J. Kirby Fowler, Jr.

Baltimore, Maryland

Fowler leads interrelated nonprofit corporations that work with the public and private sectors to make downtown Baltimore a great place for businesses, employees, residents, and visitors. Before joining the Downtown Partnership, Fowler was of counsel to Ballard Spahr Andrews & Ingersoll, LLP, where he represented clients in matters involving land use, zoning, permitting, economic development, employment law, administrative law, and contracts. He was previously a partner in the law firm of Ober Kaler Grimes & Shriver in Baltimore.

Between his stints at Ober Kaler and Ballard Spahr, Fowler served as special assistant for Economic and Neighborhood Development under Mayor Martin O'Malley. In that role, he helped bring to fruition a number of significant projects for Baltimore, including the Brown Center at the Maryland Institute College of Art, the renaissance of Belvedere Square, the completion of renovations to Hopkins Plaza, the installation of new infrastructure in Harbor Point and Fells Point, the retention of businesses such as Phillips Seafood, the disposition of city-owned properties such as the Railway Express Building, the promotion of Baltimore to members of the International Council of Shopping Centers, and the creation of arts and entertainment districts.

In 2009, Fowler was appointed by Governor Martin O'Malley to serve as chair of the Maryland State Lottery Commission. He also served on Mayor Sheila Dixon's transition team in 2006, chairing the subcommittee that identified goals for the Baltimore Development Corporation. He is also the boards of directors of several organizations: the Baltimore Hotel Corporation, the Central Baltimore Partnership, the Charles Street Development Corporation, the Economic Alliance Advisory Board (where he is currently chair), the Mount Vernon Cultural District, the Public Markets Corporation, Station North Arts & Entertainment Inc., Street Entertainers Licensing, and Westside Renaissance, Inc.

Fowler has been named "Influential Marylander 2008" by *The Daily Record*; listed in "Forty under Forty" by *Baltimore Business Journal*; named "Father of the Year" by the American Diabetes Association,

Maryland Chapter; and designated a "2008 Breaking Boundaries" honoree by the International Interior Design Association. He is a graduate of Dartmouth College and New York University School of Law.

Chuck Kubat

Las Vegas, Nevada

Kubat has more than 35 years of experience in the design, planning, and development of master-planned communities; downtown and adjacent development efforts; mixed-use commercial, retail, and resort projects; and urban design studies in locations throughout the United States. He focuses on creating great places that are sustainable, buildable, and participatory.

Kubat's recent work includes duties as the development director for Newland Communities' initial work on Las Vegas' Union Park, a mixed-use redevelopment project on 61 acres with 9.3 million square feet of buildings. For this project he created the plan and managed the establishment of design standards, the streetscape schematic design, and Leadership in Energy and Environmental Design (LEED) Gold certification as the first LEED-Neighborhood Development project in Nevada. He is also providing continuing implementation services as senior design advisor through design negotiation with third-party developers, design review of all projects as part of the city's Design Review Committee, and design management of Newland's mixed-use residential-over-retail projects. Kubat recently directed the long-range master planning for Newland Communities' 20,000-acre Estrella Mountain Ranch in Phoenix, a development of 56,000 units and 12 million square feet of commercial, employment, and institutional uses.

Before forming Kubat Consulting, he served as vice president of the Howard Hughes Corp. (an affiliate of the Rouse Company), a development company responsible for the design and planning of the Summerlin community, winner of the ULI Community of the Year honors in 2002. In this role, Kubat was involved in strategic direction setting for the project; overseeing community programming and long-range master planning, entitlements, commercial and residential design guidelines and the internal design review process; detailed village planning, and the design of streetscapes, entries, parks, community facilities, signage, and community retail projects.

Previously, Kubat had similar responsibilities as the director of Design and Planning for Friendswood Development Co. (the real estate development subsidiary of Exxon Co.) in Houston. He led planning and design efforts in several master-planned communities and was responsible for all commercial and residential design review.

Kubat was a principal and vice president of the international architecture and planning firm of RTKL Associates, Inc., in Baltimore, Maryland. There he was responsible for the planning and urban design of major mixed-use, retail, and resort projects and developments such as Reston Town Center in Virginia; Camden Yards Sports Complex in Baltimore; Harbortown in Memphis; and downtown development plans for San Jose, California, Raleigh, North Carolina, and Reading, Pennsylvania. This work included retail projects such as Peabody Place in Memphis.

Kubat is a member of the AIA (licensed in three states and through NCARB) and the American Institute of Certified Planners. He is a full member of ULI and past vice chair of its Community Development Council. He has served on invited charrette panels in Boston, Charlotte, Denver, and New York and as a jury member for *Builder* magazine and the PCBC Gold Nugget Awards. Many of his projects have won local and national awards from ULI, the AIA, the American Society of Landscape Architects, the American Planning Association, the National Association of Industrial and Office Properties, PCBC, and other organizations.

Kubat has a master's degree in city planning from the Massachusetts Institute of Technology and bachelor of architecture (highest honors) and bachelor of arts (*summa cum laude*, Phi Beta Kappa) degrees from the University of Minnesota. He has taught and lectured at several universities.

Robert E. Kuhns

Washington, D.C.

Kuhns has 34 years of experience in traffic and transportation planning. He devoted 20 years to the public sector earlier in his career. He now provides professional transportation consulting services to public, private, and institutional clients throughout the country. Since 2004 he has been the director of

Traffic and Transportation Planning for Clark Nexsen, a full-service architectural, engineering, planning, and interior design firm. He has managed long- and short-range transportation planning efforts, including corridor analyses, downtown plans, campus plans, pedestrian studies, parking studies, and travel forecasts. He has managed and directed transportation projects that emphasized improved traffic operations for municipalities, health and education institutions, community centers, government and military facilities, cultural facilities, and retail and mixed-use centers.

Kuhns has been especially focused on providing services for redeveloping and revitalizing urbanized areas, for growing higher-education campuses, and for expanding cultural and tourist venues as well as waterfront communities. He has addressed the mobility of mass movements of pedestrians at major attractions, including the Canal Street Strategic Plan for the Downtown Development District in New Orleans and the renovated Foreman Field Football Stadium at Old Dominion University in Norfolk, Virginia. He has conducted feasibility studies for the National Museum of the U.S. Army at Fort Belvoir. His protocols for special events, wayfinding, and vehicle-pedestrian conflict analysis have provided insight into these types of high pedestrian generators. He has addressed multimodal applications for Americans with Disabilities Act accessibility at local bus stops, for high-speed ferry boat and water taxi services, for marina retrofits, for streetcar services and alignments, and for modes of access to rail stations and visitor centers. He is currently monitoring and analyzing the Inter-city Bus Services Pilot Program at Union Station in Washington, D.C., another historic design by Daniel H. Burnham, co-author of the Plan of Chicago.

Kuhns has a master's degree in traffic engineering and transportation planning and an undergraduate degree in civil engineering from the University of Maryland. He is a member of the American Institute of Certified Planners and the Society of American Military Engineers. He was a member of the ULI Advisory Services panel of the Williams Gateway Area in Mesa, Arizona in 2006.

Brad Merriman

Tustin, California

Since 1980, Management Resources (MR) has worked with a wide range of clients and partnered with top designers, architects, and other industry leaders on theme park, exposition, museum, and other visitor attraction projects around the world, providing the sound business foundation necessary for growing a profitable leisure enterprise. Merriman oversees MR's business and strategic planning practice and has led or been a primary advisor on the MR team in planning new developments, enhancing business practices, improving financial performance, developing repositioning and turnaround strategies, and analyzing expansion initiatives for a broad range of clients on six continents. Merriman joined MR in 1996, following several years in management and strategic planning at two publicly traded firms in the financial products and services sector. Formerly president and managing partner of a successful services firm, he has personal experience in taking a preliminary business concept, developing a business plan, executing the plan, turning the concept into a successful business, and ultimately exiting successfully—in terms of both return on investment and establishment of a viable company.

Merriman's clients have included a variety of commercial theme parks and attractions such as Anheuser-Busch Sea World, Lotte World, Metro-Goldwyn-Mayer Studios, Warner Bros. Studios, Universal Studios, and Viacom/Paramount Studios. He has worked on corporate, promotional, and brand center approaches for the Ford Motor Company, Kennedy Space Center, Time Warner Company, and Volkswagen AG. He has also completed a variety of work with the American Museum of Natural History, the California Academy of Sciences, the Henry Ford Museum, the National Children's Museum, the Please Touch Museum, Tourism British Columbia's Aquarium of the Pacific, the American Museum of Natural History, the Field Museum, Mystic Seaport, the National Aquarium Baltimore, and the Newseum in Washington, D.C.

Currently vice chairman of the Thea Awards Committee, Merriman has held a variety of committee and regional board positions and been an active member of the Themed Entertainment Association for more than ten years. He holds a BS degree from San Diego State University.

Tom Murphy

Washington, D.C.

Murphy, a former mayor of Pittsburgh, is one of seven ULI senior resident fellows who specialize in public policy, retail/urban entertainment, transportation/infrastructure, housing, real estate finance and environmental issues. His extensive experience in urban revitalization—what drives investment, what ensures long-lasting commitment—is a key addition to the senior resident fellows' areas of expertise.

Since January 2006, Murphy has served as ULI's Gulf Coast liaison, helping to coordinate with the leaders of New Orleans and the public to advance the implementation of rebuilding recommendations made by ULI's Advisory Services panel in fall 2009. He has worked with Louisiana state leaders, as well as with leaders in hurricane-affected areas in Mississippi, Alabama, and Florida to identify appropriate areas for ULI involvement.

Murphy served three terms as the mayor of Pittsburgh, from January 1994 through December 2005. During that time, he initiated a public/private partnership strategy that leveraged more than \$4.5 billion in economic development in Pittsburgh. He led efforts to secure and oversee \$1 billion in funding for the development of two professional sports facilities, as well as a new convention center that is the largest green-certified building in the United States. He developed strategic partnerships to transform more than 1,000 acres of blighted, abandoned industrial properties into new commercial, residential, retail, and public uses. He also oversaw the development of more than 25 miles of new riverfront trails and urban green space.

From 1979 through 1993, Murphy served eight terms in the Pennsylvania State General Assembly House of Representatives. He focused his legislative activities on changing western Pennsylvania's economy from an industrial to an entrepreneurial one and authored legislation requiring the Commonwealth's pension fund to invest in venture capital. He authored legislation that created the Ben Franklin Technology Partnership, which is dedicated to advancing Pennsylvania's focus on technology in the economy. In addition, he authored legislation to encourage industrial land reuse and to transform abandoned rail rights-of-way into trails and green space.

Murphy is an honorary member of the American Society of Landscape Architects, a board member of the Pennsylvania League of Cities and Municipalities, and a board member of the National Rails to Trails Conservancy. He received the 2002 Outstanding Achievement of City Livability Award from the U.S. Conference of Mayors and was selected as the 2001 Pittsburgh Man of the Year Award by Vectors Pittsburgh.

Murphy served in the Peace Corps in Paraguay from 1970 through 1972. He is a 1993 graduate of the New Mayors Program of Harvard University's Kennedy School of Government. He holds an MS degree in urban studies from Hunter College and a BS degree in biology and chemistry from John Carroll University.

Frank Stanek

Greenfield, California

Stanek established Stanek Global Advisors in May 2004 to provide strategic and new business development advisory services in large-scale land use, leisure, entertainment and resort development on a global basis. He has been active in the leisure and tourism development and entertainment industry for more than 40 years. His primary focus in recent years has been on international business development, working extensively in Asia, Europe, and South America. Before establishing his consulting practice, Stanek held key executive positions with both Vivendi-Universal Entertainment and the Walt Disney Company.

Serving as president, International Business Development for Universal Parks & Resorts, Stanek led international development and expansion opportunities. He initiated the development of Universal Studios Japan in Osaka and the acquisition of Universal Meditteranea near Barcelona, Spain. He also managed Universal's expansion into China through Universal Studios Experience Beijing and the initiation of Universal Studios Shanghai.

As vice president, Corporate Planning, for the Walt Disney Company, Stanek facilitated the first strategic plan for the company and was active in setting future expansion and direction for the company's business units. During his 25 years with the organization, he was actively involved in all aspects of new business

creation and project development, including Walt Disney World & Epcot Center in Orlando, Florida, and Disneyland in Anaheim, California. He was responsible for the planning, development, and implementation of Tokyo Disneyland and spearheaded the development strategy, site selection, and initiation of Disneyland Paris.

Stanek has served as a director on the boards of a number of Universal Studios joint ventures. He served as a director of the United States-Japan Bridging Foundation, a commissioner of the Japan-U.S. Friendship Commission, and a director of CULCON, all of which operate under the auspices of the U.S. Department of State. Stanek is a governor of the Urban Land Foundation and an honorary member and former trustee of ULI. He served on the board of advisors for the Hollywood Entertainment Museum. He is a director of the Ryman-Carroll Foundation and is the founding chairman of the Business First Board of California State University, Fullerton. Stanek received a BA degree in business administration from California State University, Fullerton, in 1964.

Kenneth Voigt

Waukesha, Wisconsin

Voigt has more than 40 years of experience in traffic engineering and transportation planning. He has worked on traffic study projects at National Airport in Washington, D.C.; Miller Park at the University of Wisconsin-Milwaukee; the city of Charlotte, North Carolina; the city of Madison, Wisconsin; and numerous private developments. He teaches traffic engineering and environmental impact courses at the University of Wisconsin-Milwaukee and intersection design, traffic impacts of land development, traffic safety, and parking courses for the University of Wisconsin Engineering Extension Program. Voigt is certified as an ADA instructor by the Association of Pedestrian and Bicycle Professionals. His experience on large, complex corridor management projects ranging from capacity improvements to neighborhood and downtown parking studies, along with his common-sense approach to traffic management, provides insight into solving clients' traffic problems. Voigt has recently been involved in numerous context-sensitive corridor design studies and assisted

the state of Indiana with the development of state-wide guidelines for context-sensitive solutions.

Voigt is the immediate past president of the Institute of Transportation Engineers. He has received numerous awards and has presented papers at the Transportation Research Board's Urban Street Symposium, the American Planning Association, the Institute of Transportation Engineers, the American Public Works Association, the Transportation Research Board Annual Meeting, and ITS World Congress meetings.

George Wade

Los Angeles, California

With close to 30 years in the entertainment and leisure industry, Wade has become a leading innovator in the development of high-end, mixed-use entertainment projects including theme parks, themed attractions, and location-based entertainment venues. He is also a leading expert in branding and brand development within the entertainment industry. During his career, he has been recognized for his contributions to some of the industry's most prestigious projects including Tokyo Disneyland, Universal Studios Florida, The Forum Shops at Caesars Palace, Epcot Center, Luxor Hotel and Casino, and the MGM Grand Hotel and Casino.

As principal of Bay Laurel Advisors, Wade is working on a number of confidential international mixed-use projects that are merging office, residential, and retail development with destination entertainment. His experience has made him a foremost expert in high-profile entertainment brand development and in unique, consumer-oriented real estate projects that want to include entertainment elements.

From 2001 to 2009, Wade led the MGM Studios expansion into leisure-based licensing, developing the strategic vision and execution of this initiative. During his tenure—first as a consultant and for the last four years as senior vice president, Location-Based Entertainment—the company licensed the MGM brand and film portfolio for a retail, dining, and entertainment destination in Shanghai, China; a mixed-use tourist destination in Korea; and a number of theme park attractions in domestic and international markets.

Before joining forces with MGM, Wade consulted to a wide range of entertainment, leisure, retail, and technology companies. They include Paramount Parks, GTE Government Systems, Debartolo Corporation, Landmark Entertainment Group, Marriott Corp., Simon Development, BRC Imagination Arts, Entertainment Technologies Corporation, Alliance Retail Group, Iwerks Entertainment, and Canadian Niagara Hotels.

From 1991 to 1995 at Iwerks, Wade served as vice president, Business Development, leading the company's growth into new markets, including location-based entertainment. He initiated Iwerks' relationships with both Six Flags Theme Parks and Paramount Parks. Wade also established key relationships for Iwerks with entertainment industry leaders, including Universal Studios Parks & Resorts, Busch Entertainment Sea World, Caesar's World, Bass Plc., and Itochu Corp of Japan.

Previously, Wade served as production executive for Landmark Entertainment Group, rising first to vice president of Production and then to vice president of Development. Key clients included Busch Entertainment, Six Flags Corp., MCA/Universal, Caesars Palace, Hilton Hotels and Casinos, and The Gordon Company (for the highly successful Forum Shops development at Caesars Palace). Projects included The Forum Shops in Las Vegas, Universal Studios Florida, and Busch Gardens Williamsburg. Wade started his career at Walt Disney Imagineering and worked on the development of Epcot Center and Tokyo Disneyland, which provides him a unique perspective on the merging of real estate and entertainment.



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