

SUPPLEMENT

PLANNING CIVILIAN
REUSE OF FORMER
MILITARY BASES

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*The President's Economic
Adjustment Committee*

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SUPPLEMENT: PLANNING CIVILIAN REUSE OF FORMER MILITARY BASES

Community Guidance Manual XIV

Prepared for:

**The President's Economic Adjustment Committee
Office of Economic Adjustment
Office of the Secretary of Defense
Washington, D.C. 20301**



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THE OFFICE OF THE ASSISTANT SECRETARY OF DEFENSE

WASHINGTON, D.C. 20301-4000

FORCE MANAGEMENT
AND PERSONNEL

30 APR 1990

Community Officials and Leaders:

This publication supplements the 1978 manual, PLANNING CIVILIAN REUSE OF FORMER MILITARY BASES, as it was republished in March 1989 by the Office of Economic Adjustment (OEA).

Our experience in working with impacted communities as a result of base closures or realignments indicates that communities have developed capacities to organize, plan, and effectively implement civilian reuses of surplus Defense facilities. This supplement seeks to complement these capacities by summarizing recent trends in land use planning, real estate development, and property management.

The supplement will further facilitate effective local leadership strategies for determining economic recovery opportunities, formulating final base reuse plans, and assuring proper implementation through local zoning and community monitoring.

OEA hopes this supplement will help community leaders in their continuing local planning efforts that are so essential to the successful reuse of surplus Defense facilities.

Robert M. Rauner

Robert M. Rauner
Director

Office of Economic Adjustment

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1.0 INTRODUCTION

1.1 REPORT PURPOSE

The purpose of this document is to supplement a previously published report entitled *Planning Civilian Reuse of Former Military Bases*. This latter report was originally prepared by the Office of the Economic Adjustment (OEA) within the Department of Defense in 1978 and reissued in 1989 as a guide to communities dealing with base closures. The report summarized the experience that OEA had gained over a seventeen-year period prior to 1978 in assisting communities with the civilian reuse of former military bases.

This Supplement describes some of the recent trends in real estate development that are particularly relevant to a successful reuse of former military buildings and land areas. This information is intended to familiarize communities with the planning, property management and marketing techniques typically used when converting base facilities to new uses. Information on financing development or various funding mechanisms used in the implementation process is not provided in this document but is available separately from OEA on request.

The philosophy behind this document and other OEA publications on this subject is that communities experiencing a base closure or realignment need to realize the long-term positive benefits which can be derived from such activity. As a result of base closings and realignments, sizable assets are being made available to the neighboring community and region as a whole. Despite the short-term economy impacts to the community, through proper planning, management and marketing, these impacts can be overcome and the available assets turned into new uses employing community residents and providing long-term economic stability for the community and region. This document is intended to help communities realize these benefits and proceed with the proper planning required to achieve a successful conversion of a former military base to civilian uses.

Key words: Military facilities; Urban planning; Civilian reuse.
Reusable equipment; Land use. (RW3)
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Reference OEA's *Communities in Transition* for a description of 20 communities which benefited from acquisition of surplus military facilities.

INTRODUCTION

1.2 REPORT ORGANIZATION

This Supplement is organized in two sections as follows:

- The first section - **Planning for Base Reuse** - includes information on the: (1) overall planning process, (2) market studies, (3) facility surveys, and (4) land use controls available to communities to direct redevelopment of base facilities and land areas. This information supplements the information provided in the original document on development strategies and base reuse planning objectives.
- The second section - **Property Management** - discusses recent innovations that are now standard practices in managing real estate property. These factors were not covered in the original publication and represent current practices a management organization should consider when leasing and marketing former military assets.

In addition, a reference section is added to identify sources of information which may be useful to communities preparing for a base closure. This reference list identifies documents available from the government, as well as recent books and reports containing information on real estate development relevant to reuse of surplus military property.

2.0 BASE REUSE PLANNING

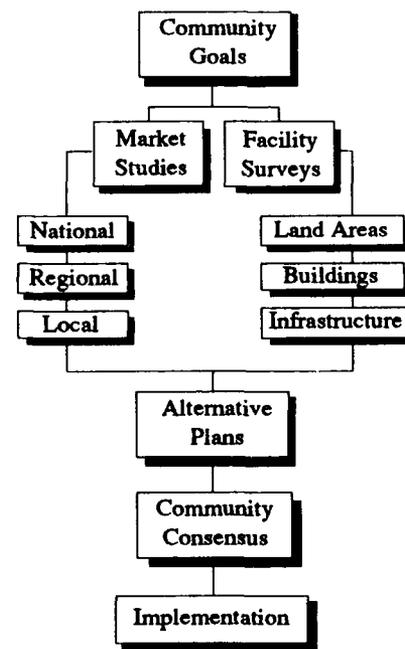
2.1 PLANNING PROCESS

A base reuse strategy and plan is a critical element in the successful civilian reuse of a former military facility. This plan is best developed by a community Task Force or group which represents the community, and studies in detail the various development potential of facilities and land uses on the base, as well as the market potential for transferring these assets to private developers, non-profit institutions, community agencies or other groups which can maintain and effectively utilize them. The reuse planning process typically followed by a community reuse organization includes the following major components:

- (1) Evaluation of community goals for the future as they relate to potential use of the former military facilities and land areas.
- (2) Market studies or surveys to evaluate the regional economic setting and trends and pressures affecting base reuse. This also may include a "Highest and Best Use" study of existing assets.
- (3) Surveys and inventories of on-base facilities to determine their condition, quality and reuse potential (and/or liability). This also includes surveys of utilities systems, transportation systems, undeveloped land areas and any unique physical conditions; e.g., historic sites, archeologic resources, hazardous waste sites, etc., which may affect reuse.
- (4) Development of reuse alternatives responding to market conditions, community goals, and reuse potential of existing assets.
- (5) Review of alternative strategies with the community at-large and consensus building for a preferred development strategy.

Once a strategy is developed and agreed upon, implementation of the plan can proceed. This is typically handled by a designated development authority or community agency charged with property

Reuse Planning Process



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management functions. The community group or Task Force which developed the plan may be retained as an "overseer," again representing the community at-large, to see that the plan's intent is fulfilled or changed as necessary to respond to changing development pressures while still meeting the objectives of the community for base reuse.

The market analysis, Highest and Best Use Study, and facility surveys conducted as part of the reuse plan are discussed separately in the following three sections of the Supplement. These aspects of the planning process are more technical in nature and sometimes are performed by outside consultants.

2.1.1 Market Demand Analysis

Understanding the nature of the local market and its inherent potentials for supporting new business locations and expansions and the development of alternative uses is a key element in formulating a realistic reuse plan. Market demand may derive from within the surrounding community or may be generated by a proposed new activity. Care must be taken in evaluating existing local demand to distinguish unserved demand from that which is served elsewhere in the immediate area by existing activities. To achieve "real" economic growth, it is essential that new market demand be the focus of the reuse strategy.

To identify realistic development opportunities and to assess their market feasibility requires that a market study be conducted. The scope of the market study should be sufficiently broad to include all realistically possible land use types. (A list of current uses for a select number of former military facilities is provided in Table 1. A more complete summary of major land reuses at former military sites is provided in Appendix B of the original OEA manual.) Identifying these by means of market screening and local input, and securing broad-base consensus among community leaders that these target markets are appropriate, is the first step in the study. This must precede the actual evaluation as the technical requirements of the market analysis vary among land use types.

Even though a list of candidate development opportunities has been prepared as the initial step in the

A summary of completed military base economic adjustment projects is provided in Appendix B of the original OEA manual.

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Table 1: Current Major Land Uses at Former Military Sites (A Sample List)

Use	Former Military Base	Location
Office/Industrial Park	Brookley AFB Benicia Arsenal Schilling AFB Presque Isle AFB Springfield Arsenal Lincoln AFB McCoy AFB Chennault AFB Raritan Arsenal	Mobile, AL Benicia, CA Salina, KS Presque Isle, ME Springfield, MA Lincoln, NE Orlando, FL Lake Charles, LA Edison, NJ
Commercial/ Retail Use	Donaldson AFB Larson AFB Charleston Navy Shipyard Watertown Arsenal Naval Ordnance Plant	Greenville, SC Moses Lake, WA Boston, MA Watertown, MA Forest Park, IL
Vocational-Technical Training	Schilling AFB Chennault AFB Presque Isle AFB Rossford Arsenal Donaldson AFB	Salina, KS Lake Charles, LA Presque Isle, ME Toledo, OH Greenville, SC
University/College/ Community College	Brookley AFB Larson AFB Stead AFB Dow AFB McCoy AFB Springfield Arsenal	Mobile, AL Moses Lake, WA Reno, NV Bangor, ME Orlando, FL Springfield, MA
Recreation Facilities	Larson AFB Clinton-Sherman AFB Greenville AFB Naval Supply Center Fort MacArthur	Moses Lake, WA Burns Flat, OK Greenville, MS Tonance, CA Los Angeles, CA

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Airport (Commercial and/or General Aviation)	James Connally AFB Stewart AFB Stead AFB Lincoln AFB McCoy AFB	Waco, TX Smyrna, TN Reno, NV Lincoln, NE Orlando, FL
Civilian Housing	Clinton Sherman AFB Dow AFB Glynco Naval Air Station Charleston Navy Shipyard	Burns Flat, OK Bangor, ME Brunswick, GA Boston, MA
Prison/Rehabilitation Center	Webb AFB Kincheloe AFB	Big Spring, TX Kincheloe, MI
Hospital	Walker AFB Laredo AFB Charleston Navy Shipyard	Roswell, NM Laredo, TX Boston, MA
Retirement Community	Hastings Naval Ammunition Depot Walker AFB Harlingen AFB	Hastings, NB Roswell, NM Harlingen, TX

Source: *25 Years of Civilian Reuse: Summary of Completed Military Base Economic Adjustment Projects*, 1986, Office of Economic Adjustment; *30 Years of Civilian Reuse: Summary of Completed Military Base Economic Adjustment Projects*, to be published in 1990, Office of Economic Adjustment.

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market study, it should be expected that the analysis will test the feasibility of these candidate uses as well as identify other prospective uses that initially may have been overlooked. These are likely to include those dependent on external market demand, although some local sources of demand are frequently discounted, too, by the local community.

The following general approach can be modified to fit the technical requirements of the market study for each type of market demand:

(1) Define Market Area

The market area includes the primary resources of demand that potentially could support a specific development project. It should be thought of as the study area for the subsequent analysis of market demand and competition.

(2) Evaluate Area Economic Trends

In order to properly evaluate the dynamics of each market being studied, it is essential to analyze the economic conditions that may shape the broader future demand structure in the area. These should include: population, employment and unemployment, personal earnings and household income, retail sales, vacancy rates, general real estate conditions, and any other area-level conditions that may impact the health of the economy in the near term.

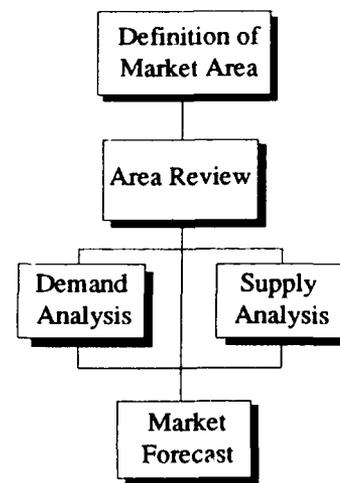
(3) Analyze Demand

For each type of market demand being evaluated, locally generated, indigenous demand should be determined. Projected demand, based on increased or decreased population and disposable income also should be computed. In addition to directly measuring demand, demand conditions may be assessed from secondary indicators such as absorption trends, sales volumes, time duration from sales listing to contract, vacancy trends, and demographic and labor force trends.

(4) Analyze Competition

To determine whether the identified market demand is being satisfied within the local economy, it is necessary to assess the sources of supply that presently serve each

Market Study Components



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identified sub-market. This will involve an inventory of comparable uses and projects that may come on line during the planning period. These should be evaluated to determine the extent to which they are serving local demand. Annual sales volumes per square foot, vacancy rates, duration of vacancy, price range, and lease costs and trends may provide indications of the magnitude of unsatisfied market demand.

For those activities dependent on **non-local** market demand, a similar scope of competitive analysis is required. The market area should be appropriately scaled for that specific use and reflect regional or national supply and demand conditions. Assessing non-local market demand is particularly critical for sites which have weak local markets because of the lack of a large population center or stagnant population growth.

It should be noted that the major demand for base facilities in the past often has come from companies or entrepreneurs outside of the local market area who want to enter new markets rapidly. Existing buildings and infrastructure at a surplus military site can be readily used to provide production and distribution facilities with little or no lead-time required for permitting, construction, and/or other start-up activities at the site.

(5) Forecast Market Demand

Based on the projection of market demand by land use type and a comparison of these demand levels with local (national) competition and supply conditions, the nature of market opportunities that may be served by new facilities provided locally can be identified by type, volume, timing or schedule, price or lease range, quality and marketing requirements. These findings will provide a range of development opportunities that may be appropriately located on or attracted to the installation in question and provide the framework for a reuse strategy and plan. The ability to capture this identified market demand at a specific location will be a function of its physical assets, accessibility, quality, availability of support services, implementation program and schedule, and other tangible and intangible factors.

Forecasting market demand in definitive terms requires detailed analysis based on accurate national, regional and local market data.

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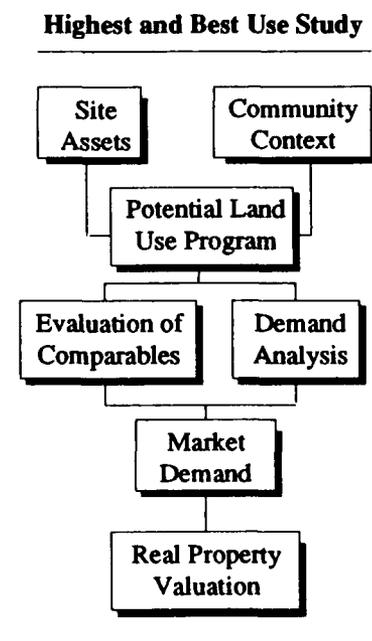
2.1.2 Highest and Best Use Studies

A common means of analyzing base reuse options is through a **Highest and Best Use Study**. Used by communities to determine the uses for a parcel that maximize the benefits to the community, this type of study combines **community objectives** with **economic value**. Long-term community goals and objectives are prioritized, compatible reuses are identified, and economic values are derived as a function of possible reuses. The conclusions of such a Highest and Best Use study, therefore, provide the community with economic data required for preparing a community base reuse plan.

Highest and Best Use studies also provide data that is especially useful in accommodating local land use priorities. Once these priorities are identified, real estate disposal agents can seek to dispose of the property (in accordance with the disposal schedule) to entities proposing compatible land uses. Private developers can also use this data to readily identify the community's needs and to propose compatible projects. In addition, other public agencies can easily identify whether their proposed reuse; i.e., distribution center, detention facility, etc., is agreeable with the goals and objectives of the local community.

Another type of "Highest and Best Use" study exists which is often used by the real estate industry to determine the uses for a parcel that generate the highest land values (in economic terms solely). Very often this type of study is undertaken in support of property appraisals. Notably absent from such studies are community planning objectives; i.e., open space, historic preservation, etc.

The process for developing a Highest and Best Use study for appraisal purposes begins with gauging viable zoning designations for the former military facility through the character and zoning of the surrounding community. These zoning classifications are then used to extrapolate a land use program for the property that maximizes economic yield. The prospective land use program, including type of land use, size, density, location and proposed amenities is then evaluated in terms of comparable projects to determine market demand. This



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process ensures that the program of land uses is translated in economically viable terms. The result of this analysis is a detailed program of land uses with an estimated absorption and phasing schedule. The economic value of the overall project is then used to assign value to the real property.

2.1.3 Land Use and Facility Surveys

As an initial step in planning for a military base closure, an assessment of land use character within the base and of the adjacent community must be made. This assessment documents the type of land use, location and density occurring on the base transferable to new ownership. Such information assists in evaluating what future use can be made of the base and where potential land use conflicts could occur. For example, if an area on or off the base contains residential uses, development of an airfield for an air-related industrial park may cause conflicts with these residential uses because of aircraft noise. The potential for land use conflicts or incompatible uses must be carefully evaluated prior to redevelopment of the base to successfully integrate the base into the land use "fabric" of the surrounding community.

When evaluating land use compatibility, as well as reuse potential, the existing facilities and land areas at a given base must be thoroughly inventoried and mapped. Facilities built for certain functions by the military; e.g., training classrooms, hospital, barracks, etc., are usually only suitable for reuse for these same functions. Adaptation of these facilities to different uses is typically too expensive to be worthwhile. Therefore, the intent of a detailed survey is to evaluate the condition and quality of these facilities to determine their general suitability for new uses without incurring major expenses for renovation or rehabilitation. This initial inventory, however, is not intended to preclude the imaginative industry-specific adaptation of the existing base structures.

Typical factors included in a facility inventory are listed in Table 2. These same factors are often already documented by the military base planner or public works officer as part of the facilities management program for the base. The reuse coordinator, base planner or public works officer for the military base will readily provide

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Table 2: On-site Inventory

Undeveloped Land Areas:

- Location
- Present use
- Physical development suitability
- Archeological resources
- Critical wildlife habitats
- Environmental constraints; e.g., floodplains, slope, soils, etc.

Facilities:

- Location
- Physical condition/age
- Structural design
- Electrical, telephone service
- HVAC system
- Architectural style
- Historic status (if applicable)
- Presence/condition of asbestos used in construction (if applicable)

Utility Systems (Water Supply, Sewerage, Gas, Central Heating, Electrical, Telephone):

- Location
- Physical condition/age
- Capacity
- Recent upgrades
- Planned upgrades

Transportation Systems (Vehicular/Pedestrian):

- Location
- Dimensions
- Road classifications
- Existing access
- Planned upgrades/improvements
- Surface parking lot capacities
- Structured parking lot capacities
- Paved pedestrian sidewalks
- Unpaved pedestrian paths
- Bicycle paths

Airfield:

- Layout and dimensions
- Clear zones/safety restrictions/approach surfaces
- Navigational Aids (NAVAIDS)
- Aircraft parking areas
- Fuel storage/distribution systems
- Lighting

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this information and will usually assist in the inventory process.

Documentation of adjacent land uses and facilities off-site is typically available from the communities' own planning documents, as well as regional or sometimes, even state-level planning resources. Adjacent land uses, zoning, and recent development proposals in the vicinity of the base are the critical data to obtain as they may affect land use compatibility of on-site development.

2.2 IMPLEMENTATION OF PLANNING THROUGH ZONING

The reuse strategy for any military base necessarily must comply with appropriate local government zoning regulations. While zoning requirements usually are not applied to active military installations, the transfer of ownership from the military to civilian uses will require appropriate zoning designations as determined by the local community. Zoning, in fact, is the primary tool available to communities to control the type, density and location of development at a former military site.

Several common zoning categories are applicable to military reuse activities. Overall, zoning regulations are applied to identify allowable uses for a particular area (or zone) and to control the location, height, bulk and density of permitted uses. Brief descriptions of appropriate zoning categories for surplus military sites are provided below.

- **Industrial zones** are generally drawn to separate industry from other uses, particularly to protect neighboring areas from industrial nuisances. In the past, little attempt was made to identify the types of industrial uses that would create a successful industrial area. For large tracts, other more flexible zoning designations are generally applied, particularly to accommodate "clean" industries within a mix of related office and commercial uses.
- **Business Park and Research Park** zoning are derived from earlier industrial categories and require the approval of an overall plan for coordinated development. These zoning categories may include a listing of permitted or prohibited uses, in addition to performance standards, and site design and architectural guidelines.

Military personnel on-base are an invaluable resource for information on facilities and infrastructure relevant to base reuse.

Zoning is the preferred tool communities should use to control the type, density and location of development at a former military base.

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- **The Mixed Use, Planned Unit Development (PUD) or Coordinated Development District (CDD)** integrates industrial uses with other compatible uses such as retail services, hotels and sometimes residential uses to create a cohesive employment center and more stimulating environment for employees. The purpose of these flexible zoning categories is to reduce travel time to work, to provide usable open space, and to achieve synergistic and harmonious relationships among different land uses. Detailed site guidelines and an overall development plan are required to avoid close proximity of incompatible uses.
- **Special zoning districts** may be created for development of existing tracts of land or special purposes such as the “enterprise” zone intended to encourage new employment-generating business and industry development in economically depressed areas. As another example, a public interest zone may be created to conserve environmental resources, to preserve historic structures, or to stimulate public interest activities of a cultural nature. Special zoning districts represent the most flexible regulatory forms available to the community and are designed to be site specific, while addressing issues such as land uses, design, transportation and architectural guideline provisions found in other types of zoning.

The most flexible form of regulation, **development agreements**, does not replace traditional zoning or other forms of land use regulation but moreover extends these regulations in a more flexible form. Development agreements are crafted between government agencies and the developer to meet the specific circumstances of a proposed development. Despite the lengthy and complex negotiations required, development agreements are particularly suited to large-scale projects. The community benefits by participating in the “custom design” of a site to meet needs identified by the community. For the developer, a well-crafted development agreement will be flexible enough to permit discretion and choice in some issues while still complying with guidelines that protect community interests. The agreement becomes legally binding throughout the life of the project and can be used to add a measure of

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certainty to the community for future activities specified in a development plan phased over many years. In such cases, future improvements or fees to cover future impacts may be required to meet planned demands.

As mentioned above, zoning is the primary land development control used to direct development at a former military site. The intent of proper zoning designations is to control and successfully integrate a former military base into the surrounding existing land use.

In a healthy market, a community can establish appropriate zoning designations (based on public input and review) and allow the Federal disposal agent to proceed with sale of the land area to private developers. The zoning designations applied will then serve to direct the type and density of uses desired by the community during long-term redevelopment of the site.

In a weak market, more flexible zoning designations may be appropriate, with oversight by a redevelopment authority or public agency, to allow for multiple uses of a given site. These uses will subsequently be evaluated on a case-by-case basis to ensure compatibility with the reuse plan and with on- and off-base land uses.

2.3 COVENANTS, CONDITIONS AND RESTRICTIONS

Protective covenants, also known as **Covenants, Conditions and Restrictions (CC&Rs)**, are a form of legally enforceable development controls established by property owners as a means to ensure proper and desirable development. These are written standards which apply to private land which is leased or sold to subsequent owners. They are filed either with the plat or with each deed for the individual properties that will be transferred to new ownership.

CC&Rs are often used to supplement traditional land use controls, such as subdivision, site plan, and zoning ordinances, where a certain quality standard of development is desired. Through their use, overall quality of development can be increased and most importantly, the controls established by CC&Rs can serve to protect the interests of both the community as well as that of the developers and investors in the base facility.

CC&Rs are part of the property deed which accompanies property transfers.

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Public ordinances, such as zoning and site plan controls, are usually intended for general application in the city or county in which they are in force. For this reason, public ordinances seldom protect features such as visual appearance, maintenance standards, signage, or other objectives that might be unique to a particular site.

To implement such concerns, a base reuse strategy might include limitations on certain types of occupancy, airfield criteria, restrictions on outdoor storage or other uses, and guidelines for landscaping and signage controls. These objectives would not typically be regulated by local ordinances, but could be established and enforced by CC&Rs. During the base planning process, it is important, therefore, to identify planning and development control objectives, and determine whether CC&Rs are necessary to preserve or enhance a desired development environment on the former base.

In order to be effective, covenants must be properly drawn and put into place. They must reflect design and development standards which can be supported by the marketplace, and most importantly, must be enforceable. In order to ensure enforceability, covenants must impose the same restrictions and give the same benefits to all of the property within the development to which they apply. CC&Rs can be more restrictive than zoning applied to the property but not less restrictive.

2.3.1 Preparation and Contents of Covenants

Typically, technical aspects and standards of protective covenants are prepared by a planner, developer, engineering consultant, and architect. An attorney should be responsible for preparing the final document in proper legal form. Covenants typically will include the following elements:

- (1) **Declaration of Intent and Statement of Purpose** - This introductory statement identifies the owner by legal name and should clearly indicate what the establishment of covenants is intended to accomplish. This section also states the legal requirement for adherence by all tenants and specifies the authority for enforcement.

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- (2) **Legal Description** - The property to which the covenants will apply should be accurately described. If so desired, additional properties may be added over time through the process of supplemental declaration. A map showing property boundaries and adjacent features may be included.
- (3) **Definitions** - Most CC&Rs provide a list of definitions of important words to clarify their intended meanings.
- (4) **Management Association** - If building sites within the project will be sold, a management association should be formed to supervise overall operations. The formation, representation and management of the association should be specified along with the procedures for maintenance assessments and enforcement mechanisms.
- (5) **Maintenance Assessments** - The mechanism for assessment of maintenance and operational costs should be specified whether or not a management association is formed.
- (6) **Permitted and/or Prohibited Land Uses** - While land uses within a project are generally governed by zoning regulations, many CC&Rs exactly specify the permitted and prohibited land uses. These uses may be segregated by area or by phase in order to advance the intended image and character of the development.
- (7) **Nuisance Restrictions** - The nuisances usually covered by covenants are generally addressed in overriding zoning requirements. However, CC&Rs may adopt more stringent requirements or specify performance standards. Typical nuisance restrictions included in CC&Rs are: hazards, noise, vibration, dust, smoke, odor, gases, glare and heat, ionizing radiation, non-ionizing radiation, waste and animals/livestock.
- (8) **Development Standards** - The covenants may incorporate standards for development and design which serve to create a pleasing environment. These standards and procedures include review of area and bulk standards, such as setbacks, parking and loading, site coverage, and building heights;

Covenants and Restrictions Checklist

- Setback requirements for buildings
- Building construction (type and size)
- Storage requirements (exterior and interior)
- Parking (location and space)
- Regulations for odor and smoke emissions and noise
- Landscaping and maintenance requirements
- Safety requirements
- Expansion rights
- Operational requirements and zoning
- Definition of business to be conducted
- Reference to any local, state or federal regulations

Source: Midwest Research Institute

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protection of natural features; and design elements such as building design and materials, landscape requirements, lighting and signage. In many instances, development standards contain illustrations and are prepared as a separate document from the covenants.

- (9) **General Provisions** - The final section generally includes other matters of a legal and administrative nature, such as the process for modifying covenants, the enforcement of covenants and provisions for renewal; and procedures for amending the covenants.

2.3.2 Enforcement Considerations

Two aspects of covenant enforcement require particular attention: the development review process, and long-term monitoring and compliance considerations. To implement CC&Rs, typically a **design review committee** is set up to evaluate each aspect of development as it is proposed, such as a new building or facility, as well as modifications to existing facilities. The review committee generally consists of members of the development team as well as outside experts, such as architects or planners. It is important that the covenants establish a specific requirement for submittals to the design review committee in order to ensure that the information received is sufficient to properly review the development proposal.

Equally important is the long-term monitoring of the development for compliance with the covenants. The covenant documents must be prepared with a long-term view, ensuring that proper measures are incorporated for enforcement after development has proceeded and with the flexibility to react to future conditions.

2.4 LONG-TERM PLANNING AND REDEVELOPMENT

The reuse of a former military installation for alternative uses requires a long-term horizon for full execution of planning and redevelopment strategies. The degree of public and private investment may warrant a development timeframe of 20-30 years during which time physical infrastructure improvements or changes in economic conditions must be accommodated.

Design standards typically address the following items:

- architectural design and building materials
 - site grading and contouring
 - fencing
 - storage areas
 - loading and service areas
 - vehicular circulation and parking
 - site utilities
 - lighting
 - signage
 - tree protection and landscaping
 - maintenance
-

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2.4.1 Orderly Long-Term Redevelopment Strategies

To adapt to anticipated and unanticipated conditions or future conditions, the reuse strategy may contain recommendations for activities phased over a period of time. **Phased development** allows for levels of development or locations for development to occur during a specified time period. Phasing is often used to stagger the costs and potential impacts of development. Determinants of phasing may include:

- market response,
- innovations in technology,
- ancillary support activities created by the development,
- infrastructure capacity,
- availability of infrastructure funding sources, and/or
- conditions of the financial capital markets.

Sequencing refers to the order in which development occurs so that subsequent stages build upon the support or infrastructure improvements occurring previously. Sequencing can be used to build a logical and pragmatic development program for redevelopment while retaining some degree of flexibility to respond to unanticipated events. Sequencing also affords the opportunity to incorporate lessons learned from earlier redevelopment activities.

The long-term **market response** will affect redevelopment activities. Projections of market supply and demand are based on information known at the time of the study. Alterations to these assumptions or the specific experience of the project may warrant a redirection of the redevelopment or marketing and promotion strategy. Similarly, **community response** may necessitate adjustments to the redevelopment strategy over the long-term. The potential for job creation, public amenities and community services at closed military installations may be redirected at any time in the redevelopment period in order to respond to changing priorities.

Periodic evaluation and revision is one mechanism to ensure the continued responsiveness of the redevelopment strategy. These periodic revisions may be required as part of the updating process for local master

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plans or small area plans and are therefore subject to community input. The community Task Force, Base Reuse Committee, Planning Commission or other public group overseeing the reuse process should be involved in this evaluation and revision process to represent the community at-large. Long-term capital facilities planning, including infrastructure programming, should be coordinated with revisions to the community reuse plan.

Community representatives need to be involved in the long-term implementation of the plan to ensure community goals and objectives are fulfilled.

2.4.2 Infrastructure Improvements

The major infrastructure improvements affecting military installation redevelopment are:

- access and transportation systems
 - roadway
 - public transit
 - rail
 - air
 - water

- utilities
 - water
 - wastewater treatment
 - electricity
 - central heating
 - gas
 - stormwater management

These infrastructure systems are designed for long-term service and require long-term planning and programming. In many cases, community or regional systems provide the infrastructure and services so that the military base redevelopment strategy must be coordinated with local demand projections and capital improvements programming.

As the future infrastructure requirements are identified, redevelopment officials should be certain that future easements needed for roadway, rail and utility improvements are included in deed restrictions of any property transference (both private sale and public conveyance). This ensures that adequate rights-of-way are reserved for future needs.

In addition to coordination with capital improvements programming at the community level, internal infrastructure planning must comply with the phasing and sequencing program outlined in the redevelopment

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strategy. This coordination ensures adequate facilities are available to service the new development in the location and time it occurs. Further, phasing and sequencing can be used to balance or mitigate potential impacts from redevelopment.

2.5 PARTIES INVOLVED IN PLANNING

The planning process for redevelopment of military installations involves a number of participants. Community groups, neighborhood organizations, and individual citizens are usually involved in the redevelopment process with the goal of reaching a compromise solution that satisfies competing interests.

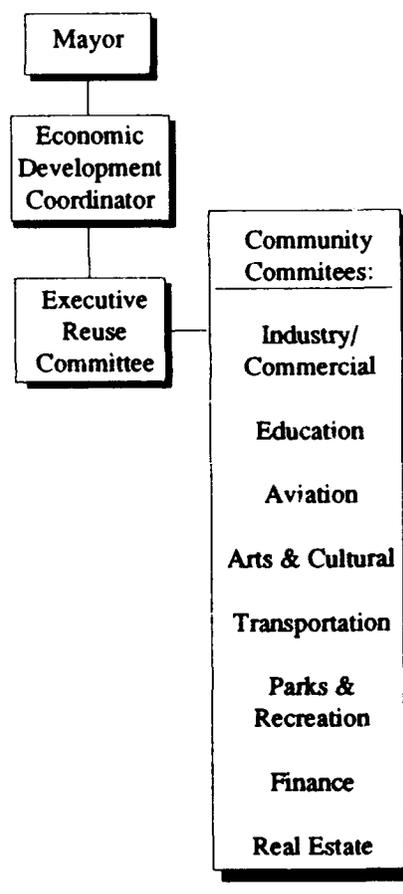
Typically, a community Task Force or Reuse Committee, which contains local private-sector leadership, is designated in the initial stages of the conversion process to represent the community at-large. This Task Force will report to the community at key decision-making points throughout the process to receive input. Preferably, a similar group stays involved throughout the implementation of the reuse plan to ensure community input and evaluation in development decisions, leasing arrangements, property sales and infrastructure improvements.

Representatives of local government typically involved in base redevelopment include the city or county council, Mayor or Executive Officer and staff from the Transportation, Public Works, Recreation, Economic Development and Environment (or Natural Resources) departments. The reuse plan usually will require review and approval from both the Planning Commission and elected city or county council.

Additionally, external agencies may be involved including:

- Office of Economic Adjustment (Department of Defense)
- State or Local Historic Preservation Officer
- Environmental agencies at the state and federal level, such as EPA
- Natural resources agencies protection at the state and federal level, such as the Fish and Wildlife Service
- State and federal transportation agencies
- State and local education officials

Community Reuse Planning Organization (example)



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Representatives of the military are involved in the initial stages of the conversion process including the reuse planning phase and property transfer. In some cases, the military agency involved will serve as its own disposal agent, or the property transfer will be handled by the General Services Administration (GSA). In either case, it is important to have representatives of the disposal agent accessible to the community to provide specific information about the property transfer as the reuse plans are prepared.

It should be emphasized that the military agency in charge of base operations prior to base closure is an extremely important resource and contact when evaluating base facilities for reuse, existing infrastructure, unique physical characteristics and other factors affecting the redevelopment strategy.

Representatives of the military are available throughout the reuse planning effort to provide data on facilities, infrastructure and other aspects of site redevelopment.

3.0 PROPERTY MANAGEMENT

3.1 MANAGEMENT RESPONSIBILITY

One of the biggest challenges facing communities in the redevelopment of military facilities to civilian use is the management and marketing of the property to achieve its full development potential. This requires specialized skills in the areas of property management, property development, marketing, and leasing.

There are a number of ways in which the management of the facility can be structured. In many cases, this will be determined by the structure of the organization which owns and/or manages the facility. For example, ownership and administration may occur through a public agency, such as an existing or specially-created authority or a government department.

Alternatively, if the redevelopment of the base facility is to occur through private sector ownership and management, then the community should rely on its zoning ordinance (and the market) to guide future reuse of the base. In this latter situation, the private company acquiring base facilities from the Federal Government will assume the long-term responsibility for developing and maintaining this property.

Irrespective of the form of ownership and management, it is important to the long term success of the facility that the proper emphasis be placed upon the property management function.

3.1.1 Establishing a Real Estate Management Function

All real estate activities associated with the redevelopment of the former base can be coordinated by a real estate organization dedicated to the successful implementation of the base reuse plan. These activities require specialized skills, and it is recommended that communities secure specialized expertise in these matters.

A properly structured organization will need to provide for the following functions:

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- **Sales, Leasing and Development** - Responsibilities include all aspects of property marketing, such as negotiations with purchasers or prospective tenants, drafting of leases and closing deals; and maintaining regular contact with tenants once they are in place and established. Development responsibilities include initiation, negotiation, and management of new projects from the feasibility stages through construction and marketing to subsequent tenants and owners.
- **Property Management** - The property management function includes all of the services needed to ensure that the property under lease serves tenant needs, retains value and maintains the image necessary to ensure continued marketing success. Responsibilities include building and grounds maintenance, rent collection, and ongoing contact with tenants. In the current cost sensitive environment, many developers are finding that it is cost-effective to subcontract out many aspects of maintenance to keep overhead costs lower. This includes janitorial services, landscape maintenance, repairs, or any other requirements and needs which can be properly controlled through subcontracting on an as-needed basis.

3.2 SALE AND LEASE OF PROPERTY

Several options may be considered for the marketing and/or ownership of former base facilities, both for existing or redeveloped structures as well as ground to be released for new development. Aside from fee-simple sale of structures or development sites, existing facilities can be leased or long-term ground leases can be structured for new development.

In determining the marketing approach to be taken, consideration must be given to the goals of the community. This includes the goals of the community at-large; i.e., jobs, tax base growth, attracting new industry, as well as those of the investors, developers and users of the facility.

3.2.1 Establishing a Leasing Program

One of the more common reuse management options is a leasing program, particularly for larger bases with

Maintenance Plan Checklist

- Landscaping: prune, replace dead plants and trees
- Regular mowing
- Street repair
- Rail spur maintenance
- Curb and sidewalk maintenance
- Adequate lighting
- Signage maintained and updated periodically
- Enforcement of covenants with all tenants
- Inspection of parking and storage areas periodically
- Monitoring of odor and smoke emissions
- Regular trash removal and debris control
- Undeveloped tracts graded/mowed

Source: Midwest Research Institute

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diverse facilities and large land holdings. A leasing program offers distinct advantages and disadvantages to the administering entity, as well as to potential users. These are summarized as follows:

Advantages:

- Continuing source of income through lease payments;
- Opportunity to capitalize on future value increases of the property;
- An effective way to quickly attract users to existing buildings;
- Control over uses of the property;
- Continued ownership of the property at the end of the lease period; and
- Maximizing business investment for businesses and tenants by minimizing real estate investment.

Disadvantages:

- A longer term series of smaller payments rather than larger, up-front purchase payments;
- Greater financial risks in the size and security of income flows;
- Greater administrative efforts and costs;
- Tenant resistance to government controls on property use; and
- Potential criticism if a public agency is competing with developers.

As a leasing program is established, it is important that the project's overall goals and objectives are identified and incorporated into the program leasing procedures. Standard leases and lease clauses will also need to be developed to fit a wide variety of possible situations likely to be encountered in the course of the leasing program.

3.2.2 Types of Leases

Two broad categories of leases are **ground leases** and **building leases**. The role of the public agency as a landlord in each category is quite different. In ground leasing, the agency will be dealing primarily with developers who will be interested in obtaining the use of a parcel of land for a sufficiently long period to justify the development of the parcel. A thorough knowledge of the development process will be needed, and on-going

For ground leases, the development agency will deal primarily with developers interested in long-term development of the parcel.

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property management activities will not be as intensive as with building leases.

Typically, ground leases have terms of 25 to 60 years. The lease needs to be structured to allow the rent payments to be periodically adjusted for inflation and increases in land value over the long lease term. The leases also need to provide for methods of controlling the type and quality of development, and the quality of maintenance and management of the development. In many cases, the agency will have little direct contact with the users of the development who will be sub-tenants of the developer. However, some ground leases will be structured directly with users who will develop facilities for their sole occupancy.

In the leasing of buildings, the managing entity generally will deal directly with the users and occupants of leased space, and on-going property management activities will be more intensive. In building management, the manager needs to achieve a reputation as a competent and fair owner who acts in a manner similar to a private owner leasing similar space. Again, careful attention needs to be given to keeping rents in line with the local market through frequent adjustments.

A master lease of a group of buildings to a developer falls somewhere between the typical characteristics of ground and building leases. Such a lease would allow a developer to upgrade a group of buildings and have a sufficient time period to amortize his investment, while relieving the agency of the burden of direct management of a multi-tenant complex.

In both ground and building leases, **percentage rent** provisions with some form of adjustable minimum rent should be used where practical. Percentage rents tied to the level of business activity on the property are more sophisticated than fixed rents and require auditing, but can be an excellent device for sharing in the success of a business while keeping rent levels in line with the market and with the potential of the property.

The length of ground leases should be related to the time needed to finance the development and to amortize the improvements yet should be no longer than necessary for these purposes. The lease should not be subordinated to any loan which could result in the loss of the property to

For building leases, the development agency will deal primarily with occupants of leased space.

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a lender through foreclosure because of the failure of the developer to make loan payments. The initial rent in a ground lease is often set as a specified percentage return on the estimated value of the land. For example, a 10 percent return on land valued at \$2.00 per square foot would require an annual rent of \$.20 per square foot. Ground lease rents typically should be adjusted at five year intervals based on changes in the consumer price index or on reappraisals of the land.

Building leases are generally set for relatively short terms of from one to ten years unless extensive special improvements are being provided for or by the tenant. Initial rents should be based on market comparisons considering such factors as location, site conditions, and other characteristics. Building rents should be adjusted at one to two and one-half year intervals, either based on changes in the consumer price index or in accordance with a preset fixed schedule.

3.2.3 Avoiding Leasing Pitfalls

As summarized above, a leasing program can offer *significant opportunities* in the redevelopment of military facilities to civilian use. However, there are potential problems if leases are not properly administered. Based upon prior experience in communities which have undergone base closures, the following should be considered:

- In the early stages of base reuse, caution should be taken to avoid tying up central or key parcels without complete and careful consideration as to long-term effects. Early activities can establish the quality and character of overall redevelopment for many years to come, and the long-term physical and economic implications must be considered.
- Special incentive or concession deals for local businesses should be approached with caution. The long-term economic viability of the development should not be compromised on behalf of short-term benefits. Companies from outside of the region may be turned away by what might be viewed as special treatment, or may look for a similar consideration, further eroding the redevelopment's long-term viability.

Caution:

- Chose tenants for key parcels carefully
 - Avoid special concessions for local businesses
 - Monitor long-term leases on an on-going basis to anticipate (and avoid) problems with tenants
-

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- The status and “economic health” of long-term tenants must be monitored on an on-going basis to anticipate changes which may affect the redevelopment’s revenue stream. Long-term leases which are due to expire should be attended to far in advance. While tenant loss cannot always be anticipated, careful monitoring can help anticipate problems and changes before they become problematic.
- Preferably leases should be “net” with the tenant assuming responsibility for all maintenance with the subject property.

3.3 MANAGING TENANTS

In order to get (and keep) good tenants, it is of vital importance to orient facility management to **tenant satisfaction**. Satisfaction hinges on the anticipation of tenants’ needs and the initiation of maintenance and improvement programs in accordance with facility budgeting requirements. Tenants who abide by lease agreements and do not cause problems should be serviced so that they will extend their leases and maintain a successful operation as a visual reference for subsequent tenants.

Facility managers must be aware of tenants needs and interests. A plan for constant communication between the manger and the tenant should include the following elements:

- A monthly report on each tenant; including data on space leased, lease expiration date, kind of activity, rents, etc.
- A visitation schedule with each tenant on a regular basis (monthly or quarterly). The meetings can be used to identify current and future space needs, to establish good communications between the owner and tenant, and to discuss lease obligations and covenant or guideline violations.

3.3.1 Tenant Improvements

For experienced developers, the ability to provide tenant improvements, including the ability to finance these improvements through the property lease, is a proven competitive advantage. It is important to consider the

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various aspects of a tenant improvement program at the outset of the base redevelopment. In order to provide for its use as a marketing and development tool, the following aspects should be considered:

- **Underwriting Procedures:** The management team must develop a good understanding of how to recover the costs of providing improvements in the lease rate. Proper amortization of improvements can be difficult to negotiate and represents some risk to the developer. However, if effectively administered, a tenant improvement program can add value to the buildings and can serve as an additional source of revenue.
- **Pre-qualification of Architects and Contractors:** In order to respond to tenant needs in a timely manner, it may be helpful to have access to pre-qualified architects and contractors. In particular for public agencies, pre-qualification can eliminate the necessity of public bidding for each improvement through an annual pre-qualification procedure.
- **Reuse of Tenant Improvements:** It is important that considerations be given to the physical condition of leased space upon the completion of the lease term. If highly specialized improvements are to be made, provisions should be included in the lease to return the property to its original condition so that the space can be re-leased. Wherever possible, tenant improvements should be oriented towards conventional finishes to facilitate reuse, particularly for smaller tenants.

3.3.2 Tenant Services

A more recent trend is the provision of centralized services to tenants. Examples might include tele-communications, office automation, reception/secretarial services, and security. If managed properly, these can be particularly successful in attracting smaller or start-up users who are often not able to afford such services on their own.

3.4 MARKETING STRATEGY

A critical aspect of the property management function is marketing the real estate assets available at the site. Pre-

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leasing of initial tenants and advertising the facilities available for lease often begins with low-key, informal contacts with types of firms suitable for the base, as identified in the market demand analysis prepared in the initial planning stage of base reuse. The initial tenant can often set the tone for the entire development, attract additional tenants, and create an image for the site that distinguishes the facility from competing developments.

Marketing efforts should be coordinated with those groups already available to the developing agent, such as the local Chamber of Commerce, local and regional economic development authorities, state development agencies, and local businesses or organizations and service groups. The initial marketing effort will also typically include working with realtors as well as developing information on the assets of the site which can be provided to potential tenants. Aspects of these latter two marketing approaches, as well as other marketing techniques used to attract tenants to a former military site, are described below.

3.4.1 Realtor Strategy

Realtors are an important source of potential deals in the local market place and can be a useful source of information about what kinds of facilities and services tenants are seeking. They also will be aware of what competitive facilities are offering, and can help in the proper positioning of the facilities as they come on to the market.

A successful strategy for realtors should consider the following:

- **Listing Policy** - An open, rather than exclusive, listing policy will encourage realtors to participate in the leasing and/or sale of the facilities.
- **Payment of Commissions** - Commissions should be paid to realtors who close deals, at prevailing market rates. Commission agreements will typically be required.
- **Communication** - Regular meetings with properly qualified realtors should be organized to communicate to them the facilities which are available. These meetings should occur on a

Marketing leads:

- Chamber of commerce
 - Port Authority
 - State offices
 - Service clubs
 - Bankers, lawyers, accountants
 - Colleges/universities
 - Utility companies
 - Foreign clients
-

Source: ULI

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regular basis, and should be supplemented by an ongoing distribution of printed materials to keep the realtor community actively involved in the marketing of the facility.

3.4.2. Marketing Materials

Effective marketing requires materials that are useful to the brokerage community, to the local Chamber of Commerce or other business organizations supporting the development of the base, and to the potential tenant. Initially, these materials should be inexpensive so they can be handed out easily and/or left with potential users. They should include, at a minimum, the following information:

- Base overview or fact sheet;
- Location map showing relationship of the base to the community and the road network, airports and rail lines which provide access to the base;
- Utility system information, location, and expected service costs;
- Sample floor plans for types of facilities available at the base and/or building data, such as interior height, width, depth, floor load bearing, door sizes, etc.;
- Photographs;
- Development plan identifying existing buildings, road networks, parcel configuration, parcel size, existing tenants, and significant site amenities such as recreation facilities, retail services, parks and open space, day care facilities (if available), restaurant facilities, etc., and
- Lease costs per square foot for available facilities.

Video tapes can also be made to promote the property's assets and allow potential tenant viewing in lieu of site visits. These tapes typically should be prepared with the outside help of a public relations or advertising agency so that they appear professional and are effective as promotional tools in today's competitive real estate market.

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Development prospectus(s) can also be prepared for those facilities which are readily reusable and are critical to the redevelopment process; e.g., training facilities, medical facilities, airfield and air industrial park facilities, etc. A prospectus need not be elaborate (xerox copies are perfectly acceptable) and typically can be assembled from materials developed from the initial reuse planning effort. It usually includes:

- Project summary information;
- Description of the site including its regional location, site amenities, transportation access, available utilities, etc.;
- Market potential;
- Description of development goals for the specific use as defined by the community;
- Available facilities for the specific use, including locations, floor plans and photographs; and
- A range of leasing and/or sales costs for available facilities.

Packaging this material will assist realtors and/or the managing organization or individual in pursuing target developers or tenants appropriate for that use. Those assets which are more readily convertible to private-sector uses and have the greatest economic return for the community should have priority in the overall marketing effort. A specific development prospectus for that use can provide a helpful tool by highlighting specific amenities or features of facilities planned for that use and the overall role it will play in the base redevelopment plan.

3.4.3 Other Marketing Techniques*

Other marketing techniques available to the managing organization include advertisement, direct mail, and conventions/meetings. These techniques are briefly

* This section was excerpted in part from *Industrial Parks: A Step by Step Guide* prepared for the Economic Development Administration by Midwest Research Institute.

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described below. Table 3 lists the range of marketing methods available and targeted audiences for which they are most suitable.

- **Advertisement:** Advertising in trade journals, real estate journals, and other publications for industries is an effective way to promote industrial facilities and/or property available at the base facility. The ad should be professionally prepared and include the name, address, and phone number of the person to be contacted who can provide immediate information on the site. Advertising also should reflect the state or local economic development theme already used for industrial development in the region.
- **Direct Mail:** After a brochure or sales price has been developed, the community can use a direct mail campaign to distribute the material. A direct mailing has two key components: (1) a mailing list and (2) the printed material to be distributed. A mailing list should be limited to those businesses which seem most likely to be interested in the site and to the people in the businesses responsible for making location decisions. A list can be compiled from contacts the community has or from a recognized industrial location research or advisory service.

The printed material to be mailed normally includes a brochure or pamphlet on the development site. This piece can be as simple or as elaborate as funding allows. The brochure should include the site information described in the preceding section, as well as information on the quality of life and community services available to new residents to the area. Examples of brochures developed for other development projects are readily available from regional economic development agencies.

- **Conventions/meetings:** Exhibiting at trade shows and other conventions or meetings is another popular marketing method. Information booths at these shows typically provide as many display materials as possible, including brochures, posters, graphics, and photographs. The booth should be

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Table 3: Matching Marketing Techniques with the Targeted Audience

<u>Marketing Technique</u>	<u>Targeted Audience</u>	<u>Comment</u>
Interviews	Local businesses	Particularly relevant when more background information is needed.
Publication Advertising	Non-local businesses (regional or national)	Useful in specific publications for specific markets.
Videos	Non-local businesses (particularly companies too far away to arrange a site visit)	Helpful to illustrate unique characteristics of the site or community. Important to be professionally produced.
Direct Mail	Local and non-local businesses	Particularly relevant to companies whose location decisions are imminent. Best followed-up with personal communication.
Conventions/Meetings	Non-local businesses	Provides opportunity for collecting data on potential businesses for further marketing.
On-site Events	Local businesses	Inexpensive; involves the general public as well.

Source: *Industrial Parks: A Step by Step Guide*, 1988, Midwest Research Institute.

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staffed by a marketing or economic development representative who is thoroughly knowledgeable of the facilities available at the site.

- **Events:** Seasonal or annual events which are already held at a community are another way to advertise the assets of a former military facility. These events can be held on-base with area businesses invited to see the facilities first-hand. Small business management seminars also can be given in conjunction with a local community college, extension service, or economic development authority. The general public should participate as well so they can see the opportunities for business in the area and indirectly contribute to the marketing effort.

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