

2017

Impact of Plans, Finance, and Zoning Policies on What Developers Choose to Build

Michele Ann Williams
Walden University

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Walden University

College of Social and Behavioral Sciences

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Walden University
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Abstract

Impact of Plans, Finance, and Zoning Policies on What Developers Choose to Build

by

Michele A. Williams

MBA, University of Phoenix, 2002

BS, Duquesne University, 1985

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Public Policy and Administration

Walden University

September 2017

Abstract

While there is considerable academic research on the intersection of comprehensive plans, finance policies, zoning policies and how these factors influence real estate developers' choice of what land to develop and what buildings to construct on that land, little is understood about whether these three variables promote or hinder real estate developers' choice of whether to build communities that promote healthy living. Using urban planning theory as the foundation, the purpose of this correlational study was to determine how real estate developers' decisions are made to support healthy New Urbanism development in the United States. Secondary data from the Urban Land Institute were used for this multiple regression study that explored the degree to which comprehensive plans, finance, and zoning policies predict the likelihood that real estate developers will build New Urbanism communities in the United States. Findings indicated that comprehensive plans, finance policies, and zoning policies had a statistically significant influence on real estate developers' decisions on the types of communities to build in the United States by 53.6%, 46.8%, and 71.6% respectively $p < .05$. The information presented in this study is important to urban planners/designers, health care professionals, and municipal officials because of the intra and interdisciplinary approach of the built environment as a nonmedical determinant of health. Cultivating public and private collaboration to develop public policy could affect social change by directly affect the alterations and improvements in the built environment health that either promote or impede healthy outcomes.

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Dedication

Be the change you wish to see in the world. My vision is health for all, regardless of where one lives. I dedicate this dissertation to all those who have come before and who will come after me to have the courage and tenacity to stand strong for their convictions even in the face of no agreement. Innovative organizations such as the Congress for New Urbanism (CNU), LOCUS, Smart Growth America, and Urban Land Institute (ULI) have led the charge for advocacy, policy development, and research that in some way have put health into all policies. The local and state organizations that come together with the community to develop strong comprehensive plans that improve population health, support economic development to stimulate stimulating job growth, consider impacts to the environment, and enhance improvements in housing and education. I am also grateful for all the researchers whose work I have used, resourced, and mention, and whose encouragement I appreciate! This dissertation is also a friendly challenge to my real estate investing peers, rehabbers, flippers, and developers to make small changes that can add health in their build environment endeavors, to develop private-public partnerships to leverage financing for affordable housing and development, and to create opportunities to make the healthy choice the easy choice through the built environment.

Lastly, for all the women over 50 who have a burning desire to make a significant positive impact and are yearning for that Second Act Career, just go for it. You are an inspiration and a flame that must sparkle brightly!

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When you have cheer leaders in your corner, amazing things happen. Dr. Anne Hacker's wisdom, creativeness, unending support, and encouragement to think critically for the truth and made her the most awesome chair that I could have possibly imagined. Thank you to Dr. Olivia Yu who broadened my horizons, provided alternative views, and asked all the right questions to have me explore all possibilities, and to Dr. Kurt Williams for joining my dissertation team and supporting me along the way. And if it were not for my dissertation coach, Dr. Sharonica Johnson, I would probably be still stuck on Chapter 1! Everyone should have such a spirited and gifted coach to add accountability and focus to the process.

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Chapter 1: Introduction to the Study

Where people live and work directly influences their health. The built environment, consisting of the physical structures that comprise where one lives and works, does not always support a healthy lifestyle. The built environment is the term that encompasses anything that is humanly conceived, created, and maintained in outdoor surroundings (Frumkin, Wendell, Abrams, & Malizia, 2011), including land use, the transportation system, and geographical design (Handy, 2005). Health care costs in the United States continue to increase while the health of Americans decreases (Davis, Stremikis, Schoen, & Squires, 2014; Organisation for Economic Co-operation and Development, 2013). Looking at lifestyle choices within the context of where one lives may assist in reversing this trend and make healthy lifestyle choices clearly accessible to more people (Ashe, Graff, & Spector, 201; Bell & Rubin, 2007; Lavizzo-Mourey, 2012; National Prevention Council, 2012; Lancet Oncology, 2012; World Health Organization Europe, 1998).

The focus of this study was the policy issues that affect real estate developers to build healthy communities and thus improve the relationship of population health and the built environment. There is an abundance of research that indicates the built environment where one lives and works impacts a person's health and psychological development (Bloom et al., 2011; Braunstein & Lavizzo-Mourey, 2011; Cummins, Curtis, Diez-Roux, & Macintyre, 2007; Ding & Gebel, 2012; Ewing, Richardson, Bartholomew, Nelson, & Bae, 2014; Lavizzo-Mourey, 2012; McGinnis, Williams-Russo, & Knickman, 2002; Meridian Planning Consultants, 2011; PolicyLink, 2014; Woolf & Braveman, 2012;

World Health Organization, 2008). These studies are discussed in more detail in Chapter 2, but these researchers have agreed that changing correlative factors of the built environment is often a slow process with drivers and barriers associated with policy changes. These changes could include complete street policies, smart growth principles, mixed-use zoning, transit-oriented development (TOD), affordable housing, residential density increases, job, school, and medical accessibility, and green spaces. Cumulatively, these changes made in a community create what is known as a complete community or a healthy community. In this study, the terms *traditional neighborhood development (TND)* and *transit-oriented development* are used interchangeably. This type of built environment focuses on elements that enhance where one lives, works, moves, and thrives (Completecommunities.org, 2013). When communities experience mental and physical well-being, their social capital and health care outcomes improve and health care costs decrease (Renalds, Smith, & Hale, 2010). Improving population health also has an effect on economic development by stimulating job growth and further facilitating improvements in housing and education (Miller, Pollack, & Williams, 2011), all having positive social change implications.

In this chapter, I provide a high level overview of this study. I describe how the current problematic conditions evolved, the purpose of the study, the research questions, hypotheses, and the theoretical and conceptual framework of the study. In addition, the nature of the study, definitions of terms unique to this study, the assumptions, scope and

limitations, and the study's significance are highlighted. Lastly, I set the stage for the literature review, which follows in Chapter 2.

Background

In 2016, lifestyle choices in the United States created a large public health challenge through a lack of focus on improving personal health (Gostin, Jacobson, Record, & Hardcastle, 2011; Lang & Rayner, 2012). Setting aside the nonmodifiable health determinants such as age, gender, race and ethnicity, and culture (McGinnis et al., 2002; Woolf & Braveman, 2011; World Health Organization, 2008), there are modifiable determinates such as health behavior choices and social environment (Braunstein & Lavizzo-Murray, 2011; McGinnis et al., 2002). Nonmedical factors include education level, socioeconomic status (Booske, Athens, Kindig, Park, & Remington, 2010; Gostin et al., 2011), and social policies of education, child welfare, transportation, affordable housing, employment, and access to medical care (McGinnis et al., 2002; Woolf & Braveman, 2012). Considering all these health determinants, nonmedical interventions are key to impacting lifestyle choices and promoting wellness (Galloway, 2014).

Examining the built environment and its impact for healthy living is one such nonmedical intervention. Since 1990, the built environment continues to be studied as a health determinant that either enhances or impedes health behaviors (Barton, 2009). A large pool of research has indicated a relationship between health and the built environment (Booth, Pinkston, & Poston, 2005; Collins Perdue, Stone, & Gostin, 2003; Erickson & Andrews, 2011; Hodgson, 2012; Wernham, 2014). Despite the growing

literature in this field, there has not been a well-established direct correlation or causal links made empirically between smart growth, the built environment, improved health outcomes (Adler, 2012; Durand, Andalib, Dunton, Wolch, & Pentz, 2011; Marshall, Piatkowski, & Garrick, 2014; McCoy, Vincent, & Bierbaum, 2010).

A variety of research exists on the built environment in relationship to a variety of factors, some of which were used as variables in this study. These included land use and physical activity (Ding & Gebel, 2012), zoning (Yang, Spears, Zhang, Lee, & Himler, 2012), safety and walking (McCormack, Shiell, Doyle-Baker, Friedenreich, & Sandalack, 2014), obesity (Booth et al., 2005; Kahn, 2011), children's activities (Robert Wood Johnson Foundation, 2011), food availability (Feng, Glass, Curriero, Stewart, & Schwartz, 2010), social capital (Cabrera & Najarian, 2013), mental well-being (Renalds et al., 2010), and bicycling (Suminski, Wasserman, Mayfield, Freeman, & Bland, 2014). Many of these relationships have been found to be statistically significant, yet there is little research available to identify why the built environment has not been changed to make it more health promoting through lifestyle, such as developing or retrofitting for complete or healthy communities.

One method to alter the built environment to make it more health promoting is a design known as New Urbanism. A movement stimulated by physical planners and architects, New Urbanism returns to the concepts that were developed in the progressive years of the late 1800 – circa 1910 for a traditional neighborhood and the Garden City (Knapp & Talen, 2005). In 1993, the Congress for the New Urbanism (CNU) was

founded. CNU (2015) comprises stakeholders who believe that well-designed, walkable, urban places create healthy and prosperous communities, provide economic and social benefits, and promote sustainability and equity.

Empirical evidence is needed to address and/or suggest policy that may improve the impact of the built environment relative to health determinants and disparities (Miller et al., 2011), obesity (Sacks et al., 2011; Swinburn et al., 2011), and chronic disease (Woolf & Braveman, 2012). This information will expand knowledge in the fields of urban planning, real estate development, economics, and politics. By narrowing the focus specifically to the relationships those real estate development policies have relative to the built environment, in this study, I explored promoters or barriers that influence changes to the built environment. The findings in this empirically based research could facilitate improved policies and practices that improve overall health and reduce chronic illness and health care costs, while also generating socially responsible and profitable financial, social, and environmental returns.

Problem Statement

The overall health of United States' citizens is poor, as indicated by high rates of chronic illnesses such as diabetes, cancer, asthma, and cardiovascular disease (Davis et al., 2014; Organisation for Economic Co-operation and Development [OECD], 2013). The costs associated with treating such illnesses is high (Ding & Gebel, 2012; Miller et al., 2010; Renalds et al., 2010; Syme & Ritterman, 2009; Williams & Marks, 2011). In 2015, the United States spent 17.5% of the Gross Domestic Product on healthcare,

compared with an OECD average of 8.9% (National Center for Health Statistics, 2016; OEDC, 2015). Although efforts have been made to reduce costs, such as the Patient Protection and Affordable Care Act of 2010 through health insurance availability and the myriad of health promotion programs offered to address lifestyle changes, behavior modification, and other health determinants, the rates of chronic lifestyle diseases continue to increase, and health outcomes have not improved (Alpert, 2009; Koh, Piotrowski, Kumanyika, & Fielding, 2011).

Researchers have connected the built environments in which individuals live to poor health outcomes; in essence where one lives matters. Since 1990, the built environment has been studied as a health determinant that either enhances or impedes health behaviors (Barton, 2009). A large pool of research has revealed a significant relationship between health and the built environment (Booth et al., 2005; Collins Perdue et al., 2003; Erickson & Andrews, 2011; Hodgson, 2012; Wernham, 2014). Healthy built environments that are well-designed, urban places with recreational activities, healthy food access, and safety for walkable/bikeable transportation and fitness can improve health (Booth et al., 2005; Collins Perdue et al., 2003; CNU, 2015; Erickson & Andrews, 2011; Glickman, Parker, Sim, Del Valle Cook, & Miller, 2012; Marshall et al., 2014). Some researchers have suggested that altering the built environment to promote healthy lifestyle choices is effective and sustainable (Ricklin & Musiol, 2012); however, the importance of developing healthy built environments has not been fully embraced for change in the United States. These factors are identified further in Chapter 2.

Past researchers have revealed that comprehensive planning, financing, and zoning policies influence real estate developers' choice of what land to develop and what buildings to construct on that land. The problem is that it is not yet understood whether comprehensive plans, finance, and zoning policies promote or hinder real estate developers to build healthy communities that promote healthy life styles. There needs to be additional research to determine how these variables impact real estate developers' choice of whether to build communities that promote healthy living.

Purpose of the Study

As mentioned previously, a large pool of research has indicated a relationship between health and the built environment. Within the past several years, health promotion strategies have moved from individual responsibility to the role of the built environment (Karpyn, Young, & Weiss, 2012) and how policies shape the built environment that affect health (Wernham, 2014). Real estate developers can play an important role in the promotion of healthy built environments. The purpose of this quantitative study was to use the urban planning theory to explore the degree to which comprehensive plans, finance, and zoning policies predict the likelihood that real estate developers will build certain types of communities in the United States.

Figure 1 outlines the components of this study. The social ecological framework served as the underlying basis for the study: The built environment in which one lives matters. The urban planning theory has an effect on real estate developers such that a variety of variables affects the types of communities they will build. These variables

either promote or inhibit real estate developers' decisions to build health communities, which ultimately will result in improved health outcomes and a healthier population. I chose the independent variables (IVs) of comprehensive plans, finance, and zoning policies because other researchers have identified these variables among many as possibly the most significant challenges or facilitators to real estate developers in building complete/healthy communities (Garde, 2006; Grant, 2009; Levine & Inam, 2004; Malizia, 2003; Schilling & Keys, 2008; Sevelka, 2004). The dependent variable (DV) was real estate developers' decisions on what type of communities to build.

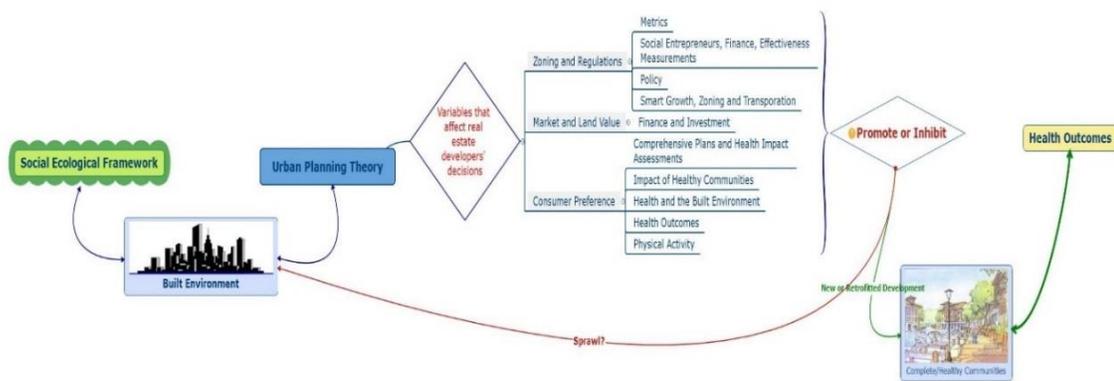


Figure 1. Model of urban planning theory as it relates to this study.

As an IV, the document known as a comprehensive plan is a key factor in one of the 10 principles of smart growth. These factors are established with hopes of making development decisions predictable, fair, and cost effective (American Planning Association, 2012; Durand et al., 2011; Smart Growth Online, n.d.). Some states have implemented mandatory comprehensive plan development and smart growth principles

into their land use regulations (Ashe et al., 2011; Hodgson, 2011; Sullivan & Yeh, 2013), but whether these plans make any difference in health outcomes is unclear.

Another IV was the financing policies affecting changes to the built environment, which also impacts the social determinants of health. Altering the built environment is a financially risky proposition. Developers who support TOD or New Urbanism get no special consideration from traditional lenders in securing a loan—no reduced interest rates or points or no improved loan-to-value ratios. Loans are based on traditional project size and type and the lender's credit rating; they are not related to the large scale development of TODs, their benefits, nor the supply and demand for them (Murphy & Falk, 2012). Appraisals to obtain comparable market analysis (or comps) are difficult because there is generally no value added to properties in proximity to transit. Lending is tied to conventional debt financing, market demand, and value, with the lender using a template based on a suburbia neighborhood development and sprawl instead of a template based on urban planning developments, such as TODs and TNDs, for example, mixed-use TOD (Cervero, 2004; Leinberger, 2001).

Zoning, the third IV, with its long association with public health issues (Oka, 2011), was also considered while looking at the built environment's influence on health. Zoning, inclusive of land use and transportation, has been identified as a partial culprit responsible for the rise in obesity (American Planning Association, 2007; Schilling & Linton, 2005). Antiquated zoning codes have been identified as barriers to development of active communities (Schilling & Linton, 2005). People living in areas with greater

density and street connectivity and mixed-use development are more likely to walk and ride bicycles for transport (Saelens, Sallis, & Frank, 2003; Schilling & Linton, 2005). A supportive pedestrian infrastructure, including trails, greenways, sidewalks, outdoor lighting, and recreation facilities, has been shown to increase physical activity, which can improve health (Sallis, Floyd, Rodriguez, & Saelens, 2012). Because current transportation policies are automobile centric by increased capacity and speeds and sprawl enabling, they do little to improve safety and active transport (SmartGrowthAmerica.com, 2015) and thus decrease the possibility of people engaging in physical activity (Seskin & Murphy, 2014).

Research Question and Hypothesis

Though this research, there were two questions that I sought to answer:

Research Question (RQ)1: Are comprehensive plans, finance policies, and zoning policies significant predictors of the likelihood that real estate developers build certain types of communities in the United States?

H_0 : Comprehensive plans, finance policies, and zoning policies do not significantly affect real estate developers' decisions to build healthy communities.

H_1 : Comprehensive plans, finance policies, and zoning policies significantly affect real estate developers' decisions to build healthy communities.

RQ2: If the answer is yes to Question 1, then to what degree do comprehensive plans, finance, and zoning policies influence real estate developers' decisions on the type of communities to build in the United States?

Conceptual Framework for the Study

The underlying foundation for this study was the social ecological framework (SEF), also known by the term social ecological model. The SEF considers the institutional, legislative, and socioeconomic disparities of an individual's physical and social living environment in combination with biological factors as a determinant of lifestyle and chronic illness (Schneider & Stokols, 2009, p. 90). Stated differently, individuals' behaviors are influenced by "intrapersonal, interpersonal, institutional/organizational/environment, and public policy" (Resnick, Galik, Nahm, Shaughnessy, & Michael, 2009, p. 527). The SEF allows an understanding of the behaviors and interactions of individuals, groups, and environmental conditions that affect one's health. In this study, I focused on the built environment relative to community factors and public policy levels; in Chapter 2, I provide a significantly more detailed explanation of SEF.

What continues to be lacking is research on policies focused on the built environment within the SEF in relationship to population health and how real estate developers, acting as social entrepreneurs, can enact social change. Because SEF is an approach that considers all factors that have an effect on an individual's behavior, and thereby their health, changes to environment or policies affecting whole communities are more likely to be sustained (Handy, 2005; Sallis, Millstein, & Carlson, 2011).

Theoretical Framework for the Study

The New Urbanism planning theory as subscribed by CNU in 1993 provided the theoretical framework for this study. Elusive and nonexclusive, the planning theory encompasses a variety of disciplines across a continuum and as such holds a different definition for each practitioner (Abukhater, 2009; Fainstein & Campbell, 2012). For planners, the frequently used planning theory is being challenged with environmental and social-ecological concerns requiring new “problem-setting and problem-solving” skills (McLeroy, Bibeau, Steckler, & Glanz, 1998; Wilkinson, 2012, p. 149).

According to Slusser (2007), there are a variety of major planning theories that are extensively discussed in Chapter 2. As an overview from the APA (2014), planning theory and city planning as a profession arose from three distinct periods: the progressive years, the comprehensive years, and the post-World War II years. The progressive years of the late 1800s through circa 1910 were the formative years and dominated by nonplanner professionals. In the second period, circa 1910 to 1945, the profession of planning was recognized with the increase in regional and federal planning initiatives. The third period was the period immediately post-World War II was the era of standardization, federal funding, and affordable housing.

The current methods of planning continue to be a reflection of the late 1950s that flourished with town projects. The urban planner entrepreneurs of today derive their design principles from Jacobs, whose book, *The Death and Life of Great American Cities* (1993), is considered seminal for “advocating for a place-based, community-centered

approach to urban planning” (Project for Public Spaces, n.d., para.1). New Urbanism is a concept that took hold among architects, journalists, and planners after the publication of Jacobs’s original work in 1961.

Fainstein and Campbell (2012) considered planning theory within the context of “political economy, history, and philosophy” (p. 5), that is flexible enough to create good places in any city and region. Similarly, Hoch (2011) suggested a planning theory shift from conceptualizing to producing better plans by integrating “geography, economics, history, sociology, architecture and other disciplinary” (p. ix) theory ideas to solve complex special problems. As such, urban planning theory, and the movement of New Urbanism, features “high-density, transit-and pedestrian-friendly neighborhoods” with multi-use zoning, sustainability, and affordable housing to address an antidote for sprawl (Fainstein & Campbell, 2012, p. 13) and a public health approach to where people live, work, and play (Barton, 2005).

It is important to distinguish between the factors or policies that affect real estate developers’ decisions to build healthy communities and not the way real estate developers make decisions. If the later were considered, the theoretical basis for this study, Smith’s (1723-1790) rational choice theory or Simon’s bounded rationality theory in design (Simon, 1972), would have been appropriate theories. Smith’s theory posits that people make decisions that maximize their self-interests but also promote public good; however, these same decisions will lessen their effects on others within obvious constraints. In a free-market economy, economic well-being could result (Hooker, 2011;

Smith, 1790/2009). Similarly, the bounded rationality theory maintains that individuals decide upon actions to maximize benefits, but the mind cannot absorb and process all the information that it receives, thereby, restricting its cognition (Simon, 1072). The mind cannot know the future; uncertainty forces individuals to make decisions that are good enough (Simon, Egidi, Marris, & Viale, 1992).

Nature of the Study

The nature of this quantitative study was a multiple regression analysis. This design allowed me to analyze the three IVs to predict the probability of the occurrence of an event (i.e., a dichotomous outcome, yes or no) and predicted outcomes or relationships. Since the variables were not manipulated, they were studied as a specific time and location. Control groups were not used. The IVs were the influence of a comprehensive plan, current finance policies, and current zoning policies, while the DV was real estate developers' decisions to build healthy communities.

Originally, a survey of real estate developers was used to determine drivers and barriers to developing certain types of communities. The Robert Wood Johnson Foundation in conjunction with the researchers at Washington University's St. Louis Prevention Research Center (Prevention Research Center in St. Louis, 2010) developed the survey instrument. The study group of real estate developers was derived from community areas using the website called The Town Paper. Although there are a variety of organizations that describe the attributes of complete communities, such as CNU, LOCUS, Smart Growth America, NeighborWorks America, the Sustainable Cities

Institute, the American Planning Association (APA), the Oram Foundation for the Environment & Urban Life, the Center for Transit-Oriented Development, the New Town Builders Association, the New Urban Guild, and Reconnecting American, none provide a comprehensive listing of areas across the United States that have common attributes except The Town Paper. The comparative group of New Urbanism (NU) real estate developers was developers of age-restricted communities. These communities were selected because of their commonality of description as defined by the U.S. Department of Housing and Urban Development (HUD). Table 1 compares and contrasts healthy communities and 55+ age-restricted communities. The availability of a nationwide list was easily obtainable through the search engine on www.TopRetirements.com, the parameters of the search was all 50 states, and the type of community was 55+ or Age Restricted.

However, the final study design executed was different than originally planned, as discussed above. I used a study by the ULI that provided secondary data that compared responses of the public and private professionals on infrastructure, economic development, finance strategies, and perceptions and priorities. The raw data were sufficient to answer this study's research question because the ULI study found that infrastructure that supports the built environment was the main driver in determining what gets built and by whom.

Table 1
Comparison of Community Types

| Characteristics | Healthy communities | Active age-restricted communities |
|--|--|---|
| Standard definition | Yes, CNU and others | Yes, US HUD |
| Include elements of a Complete Community | Yes | Yes |
| 1 st opened community | Early 1980s: Seaside, FL | 1954: Youngtown, AZ |
| Zoning | Compact, mixture of land uses, mixture of housing types, pedestrian oriented, and often a transit option | Compact, single family home, condo, apartment, modular home, RV or share a home with other single seniors |
| Density | High | High |
| Amenities for physical activity | Walkable, bikeable, green space | Active: Walkable, bikeable, golf, swimming, exercise rooms, green space |
| Locations | US and worldwide | US and worldwide |
| Obtainable information | Yes, internet searches | Yes, internet searches |
| Regular/scheduled Social activities | Not standard in all | Yes, Clubs and special interests |

Definitions

Kaplan (1996) was one of the first researchers to identify that a relationship between where someone lives, works, and plays affects their health and mortality. In 2005, the World Health Organization (WHO) established the Commission on Social Determinants of Health to address global health inequities (World Health Organization, 2008). Public health officials are being encouraged to collaborate with traditionally nonhealth related organizations (Woolf & Braveman, 2012) to include health in all policies (World Health Organization, 2010). As such, the comingling of terminology

from the disciplines of health, urban planning, architectural design, and legislation has created common use terms that need defining.

Age-restricted communities: A type of active adult community comprised of a variety of housing options. An age-restricted community is defined by HUD in the Fair Housing Act as one specifically developed for adults aged 55 and older for at least one resident in 80% of the units (HUD, 2016). A variety of amenities to support an independent active lifestyle setting usually with no health-related services is featured in these communities.

Built environment: The built environment is the term that encompasses anything that is humanly conceived, created, and maintained in outdoor surroundings (Frumkin et al., 2011), including land use, the transportation system, and geographical design (Handy, 2005).

Commodified: A term coined by Leinberger (2005) that describes product driven real estate that has been turned into a commodity of 19 generally single-use, standard product types, such as residential housing, including single family homes in developments, commercial buildings in strip malls, or commercial buildings for offices (see Table 1). This commodification of real estate and its extreme specialization provides the current way to access financing and reduce investment risk (Leinberger, 2005, 2008).

Community investment: Investments that directly provide access to credit, equity, and banking needs to low-income, marginalized, and underserved communities are community investments (Humphreys, 2007).

Complete communities: An “integrated approach to transportation planning, land-use planning, and community design” (Scott & Nau, 2012, p. 3) such that the intent is “to use less land and reduce the separation of land uses in order to achieve a variety of values including open space protection, community vitality, affordable housing, air quality, transit use, and more walkable places” (Pivo, 2005, p. 3). The five key characteristics that identify a complete community are complete streets, efficient land use, healthy and livable, inclusive and active, and sustainable (Patterson et al., 2013).

Complete Streets: In 2004, the National Complete Streets Coalition launched the national Complete Streets initiative that provides expertise to policy makers and professionals to ensure that streets are safe and useful for people of all ages and abilities, for both motorized vehicles and other modes of transit (Lopez, 2012; Smart Growth America, 2014).

Comprehensive plan: A long-range planning document (10-20 years) that is useful in policy development. It is a plan that is separate from zoning codes and addresses the built environment and how the various public facilities interrelate, with consideration to the social, economic, and environmental factors facing that community (Hodgson, 2012; Ohm, 1996). Specifically in this study, comprehensive plans focused on the aspects of infrastructure, human transit, recreation, parks and open spaces, consumer demands, clean air and water, and quality health care that are holistic to the built environment.

Diabesity: Diabesity is the clinical presentation of excess body fat or obesity and Type 2 diabetes occurring together (Astrup & Finer, 2000) as a result of lifestyle behaviors of “sedentary lifestyle and dissemination of the western diet” (Farag & Gaballa, 2011, p. 29).

Economic development: Economic development refers to the policy intervention and collaboration of government, private, and not for profit organizations from a variety of disciplines to promote the inclusive sustainability of economic and physical health and safety for the community being served (California Association for Local Economic Development, n.d.; The World Bank, 2011).

Finance policies: Finance policies are related to fiscal oversight, payments, and market stability and efficiency (International Monetary Fund, 2000). In this study, finance policies include tax structure, financial incentives, payments, value capture strategies, and financial contributions from government for infrastructure.

Green Urbanism: A term that arose in the 1990s that describes New Urbanism with a concentration on “green” development, or that which is environmentally friendly (Ivanic & Grant, 2011). Lehmann (2010), in reviewing published literature on the birth of green urbanism, further added that it is a conceptual model whereby an interdisciplinary team collaborates to strive for zero-emission and zero-waste urban design through minimal use and transportation of energy, water, and materials during the entire life cycle process.

Health: As defined by the WHO, health is “a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity” (Official Records of the World Health Organization, 1948). Physical, mental, and social well-being are influenced by the built environment.

Healthy City: Healthy City describes a city that utilizes its resources to improve the physical and social environment resulting in community support that allows individuals to perform and develop to their highest potential (Hancock & Duhl, 1986).

Healthy community: As defined by the American Public Health Association (2016), a healthy community is a localized geographical area that meets the residents’ basic needs, provides supportive economic and social development, promotes sustainability, and focuses on positive social relationships. Health Resources in Action (2013) examined 153 programs and organizations and compiled the most comprehensive definition of healthy communities to include characteristics and processes (see Figure 2, Appendix A). Although in this study the characteristics and processes were mentioned directly or indirectly throughout, I defined a healthy community as simply as a location that has been intentionally developed according to TND design to enhance health, physical activity, safety, and social connection.

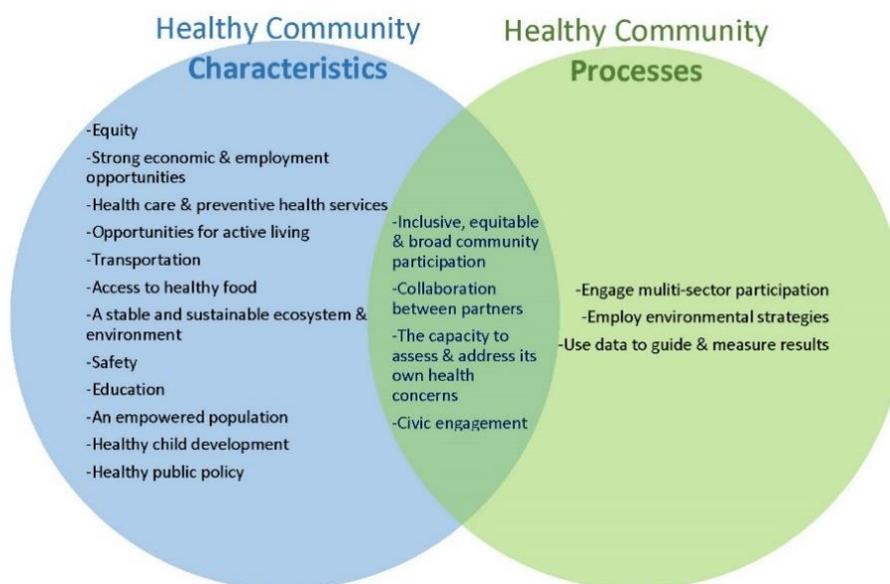


Figure 2. Healthy community definition. From “Defining Healthy Communities,” by Health Resources in Action, 2013 Health Resources in Action, p. 9. Copyright 2013 by Health Resources in Action. Reprinted with permission.

Healthy lifestyle choices: Those choices that prevent and in many cases reverse chronic illness by controlling modifiable risk factors (Chiuve, McCullough, Sacks, & Rimm, 2006; Chiuve et al., 2011; Ford, Bergmann, Boeing, Li, & Capewell, 2012; HealthyPeople.gov, 2013; King, Mainous, Carnemolla, & Everett, 2009; Rippe, 2013). This includes maintaining healthy weight (body mass index <25 kg/m²), elimination and/or avoidance of tobacco, physical activity (moderate-to-vigorous activity ≥30 min/day), limited alcohol consumption (1 drink/day for women; 2 drinks/day for men), stress reduction and adequate sleep, and dietary choices to include whole food plant based nutrition, elimination of processed foods, and reduction of sugar, oil, and salt (Campbell & Jacobson, 2013; Ornish et al., 1998).

Healthy Places: Originally described in the *Healthy People 2010* report and expands on the definition of a Healthy City with the design intent of freedom of choice of “a variety of healthy, available, accessible, and affordable options” that will improve an individual and community’s quality of life (Centers for Disease Control and Prevention, 2014, para. 1).

Incentive zoning: Incentive zoning is a method by which land use regulations encourage development of necessary community amenities and designs in exchange for developer financial or nonfinancial incentives such as variances in density (Clark, 2007).

Mixed-use zoning: A “blending of residential, commercial, cultural, institutional, and industrial” structures that increases density and compacts development for land use efficiency and reduction of energy and transportation costs (American Planning Association, 2006, p. 1).

New Urbanism: At its core, New Urbanism stresses the spatial context of communities and the built environment that fosters interaction (Wendt, 2009) and a return to traditional planning principles that existed before the proliferation of automobile use; it also focuses on neighborhood centers and residents obtaining what they need for daily life within walking or biking distance (Ewing, Meakins, Bjarnson, & Hilton, 2011).

Placemaking: A transformation of plans, designs, and management of public spaces that inspires, affirms, or improves connections between people culturally, economically, socially, and ecologically (Gladney, 2014; Project for Public Spaces, n.d.).

Obesogenic: Usually used in the context of an obesogenic environment, it is the cumulative effect of all influences that can promote obesity, such as built environment, food deserts, fast food availability, lack of physical activities, and life conditions (Lake & Townshend, 2006).

Scaling of social value or scaling social impact: The process by which a socially motivated individual or organization attempts to fill the gap of the current state to that of a desired state of a social need or problem is scaling social impact (Dees, 2006).

Smart Growth: Smart Growth is a planning approach that promotes social, economic, and environmental sustainability that empowers a community to make choices to enhance personal freedoms, improve use of public resources, and create a healthy, safe, natural, and economically thriving community (American Planning Association, 2015; Smartgrowth.org, 2014).

Social capital: As a determinant of health, social capital is the collective networks of individuals with shared values that enables cooperation in communities (Mohnen, Groenewegen, Volker, & Flap, 2011; Rupasingha, Goetz, & Freshwater, 2006).

Social entrepreneur (SE): “A visionary individual, whose main objective is to create social value, able at one and the same time to detect and exploit opportunities, to leverage resources necessary to his/her social mission and to find innovative solutions to social problems of his/her community that are not properly met by the local system” (Bacq & Janssen, 2011, p. 388).

Social innovation: “A novel solution to a social problem that is more effective, efficient, sustainable, or just than existing solutions and for which the value created accrues primarily to society as a whole rather than private individuals” (Phills, Deiglmeier & Miller, 2008, p. 36). The Schwab Foundation for Social Entrepreneurship and the World Economic Forum (2013) defined social innovation as “the application of innovative, practical, sustainable, business-like approaches that achieve positive social and/or environmental change, with an emphasis on low-income or underserved populations” (p. 5).

Social value: Another challenging idea to financially quantify, social value measures benefits to society or reductions of costs to society through initiatives to tackle social needs and problems, either for a disadvantaged segment of society or for society as a whole (Phills, Deiglmeier & Miller, 2008), and the interaction between supply and demand in markets for social value (Mulgan, 2010).

Sprawl: Sprawl describes low-density development not connected to existing developments and infrastructure, resulting in an increase in developed land, costs, population stabilization, and car dependence (Godschalk, 2000; Vandergrift & Yoked, 2004).

Sustainable, Sustainability: Solutions that can continue to work over time (Phills et al., 2008). In financial terms, Humphreys (2007) defined sustainability as a long-term approach to value creation that seeks to maximize durable financial returns through managing social and environmental risks, minimizing social and environmental

externalities, and efficiently using natural resources. Sustainability as defined by the APA is different depending on what issues and concerns the community places focus on (Ricklin et al., 2012). Other definition inputs include meeting future needs without compromising the needs of future generations (World Commission on Environment and Development, 1987).

Traditional neighborhood development (TND): A term used by Duany Plater-Zyberk & Company to describe a compact, village-style development with an active town center, a variety of housing types, mixed land uses, and transit options (as cited in Garde, 2006; National League of Cities, 2013).

Transit-oriented development (TOD): Through city and regional planning and suburban renewal, TOD uses the focal point of public transportation in designing “compact, walkable, mixed-use sustainable communities“(Transit Oriented Development Institute, 2015, para. 2).

Underserved populations: Although Marcus, Ciccolo, Whitehead, King, and Bock (2009) simply defined underserved populations as those with “low incomes and/or minority racial or ethnic status.” (p. 245), the Patient-Centered Outcomes Research Institute identified those populations who have a disproportionate rate of preventable chronic disease, including racial or ethnic minorities, individuals with disabilities or low literacy, those living in rural areas, and lesbian, gay, bisexual, and transgender individuals (Patient-Centered Outcomes Research Institute, 2014).

Zoning and zoning policies: The area or district that is specifically set aside for a certain type and size of land use, building heights and building types, and density, that is regulated and mandated by an individual or committee within the municipality (Davidson & Dolnick, 2004). In this study, zoning policies included development/building regulations, public transit and transportation, well maintained roads, parking, and walkable development.

Assumptions

In research, an assumption is a logical expectation of something believed to be true but no empirical evidence exists to support it. The researcher has no direct control over assumptions, but assumptions are needed to conduct a research study and to evaluate a particular test. If these assumptions were absent, the study and thus research question would not exist (Simon, 2011). I made epistemological assumptions in this research because I wanted to understand my beliefs that I may have in order to create, gain, and disseminate more knowledge in this field (MacIntosh, 2009; Rehman, Ahmed, & Farooq, 2014; Steup, 2014).

Several assumptions were made in this study and include the following:

Variables were objectively identified, measurable, and their relationships measured (Rehman 2014). I was objective, separate from the research, and took an outsider's viewpoint. The responses from real estate developer survey participants were assumed to be truthful and honest as a result of the anonymity and confidentiality I assured. The survey volunteers were also free to withdraw from the study at any time with no

consequences. The survey volunteers were in the position in the organization to correctly articulate the survey answers and were able to understand the survey and provide appropriate responses. The sample chosen for this study was representative of the population to which inferences were being made. The IVs were continuous and discreet, there were no assumptions about the distribution, and the DV was dichotomous. The study could be replicated and could be generalized to other real estate developer in the United States. For the sake of this study, it was assumed that cost overruns and unmet production deadlines as a result of building a complete community were insignificant. It was also assumed that public, private, and not-for-profit enterprises were eligible for the same governmental funding programs through the same criteria. Lastly, it was assumed that some real estate developers are social entrepreneurs based on their survey answers and that the primary focus of their work was the good of society.

Scope and Delimitations

Unlike limitations, delimitations were controlled by the researcher and the scope defined the boundaries of the study (Baltimore County Public Schools, 2015; Simon, 2011). The boundaries of the population for this study included English speaking male and female adults who had access to email and the Internet, were able to answer an online survey, were between the ages of 18 and 100 and were involved in development, building, and/or investing in healthy and age-restricted communities. Individuals in this study were not excluded based on race, culture, or ethnicity. Excluded from this study were individuals under the age of 18, individuals unable or unwilling to provide an

informed consent, and participants unable to speak or read English because the survey was only conducted in English.

The scope was the parameters chosen for the study, what was included and what was not included. A causal-comparative/quasi-experimental study was used to investigate how policies affected real estate developers' decisions for the built environment. In this study, I did not look at specific programs that affect health determinants or health promotion initiatives. I focused on certain specific aspects of the built environment that has been demonstrated to facilitate health. This homogenous and purposeful expert sampling of real estate developers was selected from specific demographic locations throughout the United States that were recognized to be healthy complete communities or age-restricted communities as a basis for their development. Healthy communities are very slowly being developed throughout the United States for a variety of reasons, such as health, environment, and economics. From this study, I provided information that was generalizable across the United States for real estate developers deciding what type of community they will build.

Limitations

Limitations were potential weaknesses in theory or methodology that could affect the internal and external validity of a study and thus could decrease the study's credibility or generalization. Although "no perfect measures of health or its determinants exist," (p. 72) and time to perform this study was limited, I obtained the best and most appropriate data that were available (Catlin, 2014). Since there was little research done on the

relationship of urban planning theory, development and community policies, the built environment, and health outcomes, this study was more exploratory than correlational. Although the survey tool was previously used by authors in previous work and approved by the research team and research protocol committee, the authors noted that some survey items were not rigorously tested for reliability, thereby allowing bias to impact the study results (Carnoske et al., 2010).

Regression analysis only discovers relationships; it does not determine the underlying cause. Also, there has not been a well-established direct correlation or causal link made empirically among smart growth, the built environment, and improved health outcomes. The validity and reliability of the survey instrument may have been a potential limitation. Every possible consideration was given to the constructs in the literature, but there was still a question of its effectiveness.

Because I used statistical tests, there was the possibility of experimental errors. Type I errors could indicate that the null hypothesis is correct (α -error, false positives) despite it being rejected. Conversely, type II errors (β -errors, false negatives) could indicate that the hypothesis is correct despite it being rejected (Kalla, 2009). Another common bias was one of instrumentation; therefore, the survey needed to properly calibrated to minimize skewed results (Shuttleworth, 2009).

As a real estate investor, environmentalist, and health advocate, I had biases that could have influence the outcome of this study. I had my own intuitive results of the survey based solely on my real estate experience. I also had the bias that personal

responsibility plays a large part in how people choose to live and not only where people live. I chose a quantitative methodology to minimize personal bias.

Significance

Chronic illness as a result of lifestyle choices is a problem that impacts all Americans and reverberates globally with respect to direct health care costs to the individual and society, indirect costs from lost productivity, disability, and premature death, and decreased quality of life (Bloom et al., 2011; Center for Strategic & International Studies, 2013; Dixon, 2010). The US Department of Health and Human Services Healthy People 2020 focus objectives include lifestyle choices that include appropriate nutrition and physical activity as some ways to reduce chronic illness risks. A variety of health promotion programs have been to facilitate wellness, including healthful diet and body weight maintenance to reduce chronic illness risks, emphasizing individual behaviors and environmental controls. Also needed are policies that promote healthful diets and decreasing food insecurity. Further, physical activity as measured through regular physical activity including walking and biking and improvements in structural environments and legislative policies (HealthyPeople.gov, 2013) have been correlated with wellness.

Social and economic determinants also impact health. Braunstein and Lavizzo-Mourey (2011) and Bell and Standish (2009) identified a direct correlation between how low the economic status of a neighborhood is and the presence of higher morbidity and mortality rates as well as higher rates of obesity, diabetes, and heart disease. Economic

development of these underserved neighborhoods could help to improve health outcomes and minimize health disparities by affecting the physical, economic, and social environment (Cassidy, 2011). By understanding the factors that could minimize risk and maximize rate of return for developing healthy communities, real estate developers could potentially reduce health disparities and facilitate improvements in health relative to changes in social and physical environments throughout the United States.

Social entrepreneurs by way of real estate developers exist to have an impact on society through their resourcefulness, creativity of leveraging nontraditional resources, and innovating solutions (Mair, 2010). Knowing what the barriers are to facilitating good decisions for building healthy communities may assist policy makers on reevaluating policies that prohibit or stimulate development of healthy communities. Investors may want to invest in building healthy communities because of the greater impacts on health, environment, social capital, and economic development and growth. Further, the banking industry may have to alter its funding and lending requirements in this multiuse zoning complete community paradigm. Public, private, and not-for-profit funds could be spent more effectively by developing a built environment that supports health rather than degrades it. The potential implications for positive social change are indirect improvements in mental and physical well-being, social capital and health impacts, decreased health care costs, stimulation of job growth and economic development, and improvements in policy development in education and housing.

The information from this study expanded knowledge in the fields of urban planning, real estate development, economics, and politics. By narrowing the focus specifically to the relationships those real estate development policies have relative to the built environment, I explored promoters or barriers that influence changes to the built environment. The significance of the relationship was that it provided an understanding of how specific policies influence the slow rate of change for real estate development of a healthy built environment and which policy, if changed, will have the greatest impact to facilitate healthy community development, both of which may correlate improved health measurements in a community.

Further, it is not yet understood why more health promoting environments are not developed for new communities or retrofitted for an existing community. Few researchers have answered this question from the real estate developers' perspective. Because the relationship of health impacts of the built environment has gained some leverage, albeit slowly, health officials alone rarely have the capacity to make changes in the economic, physical, or service capabilities of society (Gortmaker et al., 2011). These areas are impacted by nonhealth related organizations such as transportation, employment, housing, education, security, agriculture, infrastructure, parks and recreation organizations, and financiers (Hammond, 2012). Such efforts will help guide policy makers toward the WHO's Adelaide Statement on Health in All Policies approach, that is also gaining traction throughout the world (Rudolph, Caplan, Ben-Moshe, & Dillon, 2013; World Health Organization, 1988,, 2010).

Summary and Transition

In this chapter, I provided an overview of lifestyle choices that cause increasing rates of chronic diseases in the United States and the effects that the built environment has on health. Where people live and work directly influences their health. Changing the built environment to support healthy behaviors is often a slow process with policies that affect the decisions of real estate developers to build healthy communities. Coordinated and collaborative efforts are needed to make changes in the economic, physical, or service capabilities of society, and areas of transportation, employment, housing, education, security and security, agriculture, infrastructure, parks and recreation organizations, access to medical care and healthy food, and financiers all play a part in improving the built environment. In this quantitative study, I explored the degree to which comprehensive plans, finance, and zoning policies predicted the likelihood that real estate developers will build certain types of communities in the United States. This information added new knowledge to the fields of urban planning, real estate development, economics, and politics. The significance of the information was that it may provide an understanding of how specific policies could facilitate good decisions toward building healthy environments. In Chapter 2, I synthesize existing literature to demonstrate the framework that guided the research, methodology, and data collection.

Chapter 2: Literature Review

In this literature review, I provide an exhaustive discussion from many authors focused on the built environment in the United States. The built environment in the United States creates a lifestyle that contributes to chronic illness, such as obesity, diabetes, heart disease, cancer, and asthma, and these chronic illnesses increase health care costs (Ding & Gebel, 2012; Ford, Croft, Posner, Goodman, & Giles 2103; Hammond, 2012; Miller et al., 2011; Shi & Singh, 2012; Smith & Hale, 2010; Suhrcke, Nugent, Stuckler, & Rocco, 2006; Syme & Ritterman, 2009; Thrall, 2005; Williams & Marks, 2011). Researchers have agreed that this trend can be associated with nonmodifiable risk factors, such as age, gender, race and ethnicity, and culture (World Health Organization, 2008; McGinnis et al., 2002; Woolf & Braveman, 2011), while there are modifiable determinates such as lifestyle choices, health behavior choices and social environment (Braunstein & Lavizzo-Murray, 2011; McGinnis et al., 2002). Nonmedical factors include socioeconomic status (Booske et al., 2010; Gostin et al., 2011) and social policies of education, child welfare, transportation, affordable housing, employment, and access to medical care (McGinnis et al., 2002; Woolf & Braveman, 2012). Further, lower educational attainments have also been linked to higher health indicators that result in increases in diabetes and heart disease and shorter life expectancy (Andrews & Retsinas, 2012; Bell & Standish, 2009; Glover Blackwell, 2012; Kaplan, 1996; Williams & Marks, 2011; Woolf & Braveman, 2011). Considering all these health

determinants, nonmedical interventions by changing the built environment are key to promoting wellness (Galloway, 2014).

Since 1990, the built environment has continued to be studied as a health determinant that either enhances or impedes health behaviors (Barton, 2009). A large pool of research has indicated a relationship between health and the built environment (Booth et al., 2005; Collins Perdue et al., 2003; Erickson & Andrews, 2011; Hodgson, 2012; Wernham, 2014) and is further explained in this chapter. Despite the growing literature in this field, there is a lack of standardized framework for research (Kirk, Penney, & McHugh, 2010), nor has there been a well-established direct correlation or causal link made empirically among smart growth, the built environment, and improved health outcomes (Adler, 2012; Durand et al., 2011; Marshall et al., 2014; McCoy et al., 2010) or financial effectiveness of implemented programs (Freeman, Jalaludin, & Thompson, 2011). With increasing health care costs coinciding with a decrease in public funds for infrastructure and investment (Breuning & Busemeyer, 2012; Shi & Singh, 2012; Wang, McPherson, Marsh, Gortmaker, & Brown, 2011), the current health care funding mechanism is not sustainable.

Narrowing the focus, a variety of research exists on the built environment in relationship to a variety of factors. These factors include land use and physical activity (Ding & Gebel, 2012), zoning (Yang et al., 2012), safety and walking (McCormack et al., 2014), obesity (Booth et al., 2005; Kahn, 2011), children's activities (Robert Wood Johnson Foundation, 2011), food availability (Glass et al., 2010), social capital (Cabrera

& Najarian, 2013), mental well-being (Renalds et al., 2010), and bicycling (Suminski et al., 2014). Many of these relationships have been found to be statistically significant and will be further explained in this chapter, yet there is little research available to identify why the built environment development has not been changed to make it more health promoting, such as developing or retrofitting for complete or healthy communities.

Empirical evidence from a variety of researchers has suggested a need to address policy creation that reduces some of the drivers of health disparities, obesity, and chronic disease (Miller et al., 2011; Swinburn et al., 2011; Woolf & Braveman, 2011). However, changes to the built environment are slow to occur because of challenges to policy adoption, thus more Americans continue to be unhealthy (Burden & Littman, 2011; Seskin & McCann, 2012; Woolf, Dekker, Rothenberg Byme, & Miller, 2011). Although recognition of the health impacts of the built environment has gained some leverage, albeit slowly, health officials alone rarely have the capacity to make changes in the economic, physical, or service capabilities of society (Gortmaker et al., 2011). These areas are impacted by nonhealth related organizations such as transportation, employment, housing, education, security, agriculture, infrastructure, parks and recreation organizations, and financiers (Hammond, 2012). A coordinated and collaborative effort needs to be undertaken with the public health community and nontraditional agencies to facilitate healthy lifestyle choices to decrease health care costs and increase effective use of funds, affecting the built environment that can improve health outcomes.

According to Ricklin and Musiol (2012), altering the built environment to promote healthy lifestyle choices is effective and sustainable. More specifically, there are many possible factors contributing to slow changes in the built environment. These factors include food and agricultural policies (National Prevention Council, 2007), antiquated banking policies involving project funding (Leinberger, 2005), financial risk aversion (Daniels & Daniels, 2003), misinformation about healthy communities from real estate developers, investors, and the community, the perception of lack of profitability (Leinberger, 2007), no benchmarks or standardized metrics (Vandergrift & Yoked, 2004), lack of research for a theoretical or contextual basis (Danielson, Lang, & Fulton, 1999), Not In My Backyard attitudes (Carliner, 1999), misinformation about market drivers, local planning and development regulations (Schilling & Linton, 2005), transportation policies and funding (Transportation Research Board, 2005), no benchmarks or standardized metrics (Canadian Institute of Planners & Ecoplan International, 2013), lack of study for the theoretical or contextual basis academic curriculum (Vandergrift & Yoked, 2004), and capitalism (Leinberger, 2007). All of these individual factors cannot be specifically addressed in this research, but will be narrowed down to three policy analyses.

The purpose of this quantitative study was to use the urban planning theory to explore the degree to which comprehensive plans, finance, and zoning policies predict the likelihood that real estate developers will build certain types of communities in the United States. Despite the growing literature in this field, there is a lack of standardized

framework for research (Kirk et al., 2010), nor has there been a well-established direct correlation or causal link made empirically between the built environment, policies, and improved health outcomes (Adler, 2012; Durand et al., 2011; Marshall et al., 2014; McCoy et al., 2010). This information from this study expanded knowledge in the fields of urban planning, real estate development, economics, and politics. By narrowing the focus specifically to the relationships those real estate development policies have relative to the built environment, in this study, I explored promoters or barriers that influence changes to the built environment. The significance of the relationship is that it may provide an understanding of how specific policies influence the slow rate of change for real estate development of a healthy built environment and which policy, if changed, will have the greatest impact to facilitate healthy community development, both of which may correlate improved health measurements in a community. Through identifying these promoters and barriers, stakeholders can understand how to facilitate decision making to maximize the capabilities of real estate developers to develop healthy communities and reap the health benefits of an improved built environment (Jackson, Dannenberg, & Frumkin, 2013).

In order to better understand the relationship of the built environment on population health, the direct and indirect costs of traditional planning and development models, and the way in which capital contributes to both health and development, I began this literature review by presenting the SEF as a rationale for suggesting a relationship between the built environment and health, then established the urban planning theory, and

lastly, provided the scholarly foundation for this quantitative study. The major topics of this literature review include (a) a discussion of the search strategy employed, (b) the applicability of the conceptual framework and theoretical foundation, (c) the review, and (d) the concluding summary.

Literature Search Strategy

A comprehensive inquiry was used for this literature search using the following databases: Academic Search Complete, Business Source Complete, CINAHL Plus with Full Text, Dissertations & Theses, EBSCO, Google Scholar, GreenFILE, Hoover's Company Records, ICPSR - Inter-University Consortium for Political and Social Research Datasets, MEDLINE with Full Text, National Bureau of Economic Research, Project Muse, ProQuest Central, ProQuest Health & Medical Complete, ProQuest Nursing & Allied Health Source, PubMed, Regional Business News, SAGE Research Methods Online, ScienceDirect, and Springer ebooks.

The scope of the search in order of precedence was peer-reviewed articles, journals, and/or conference presentations; books; official published reports and policy briefs from leading associations, organizations, or research firms; nonpeer-reviewed literature from official websites; and print and online newspapers, blogs, or stories. Books proved to be valuable for discovering seminal data and authors on a wide variety of topics. The main timeframe set for the bulk of the literature was nothing older than January 2009, with the exception of references considered concept building, historic, theoretical, significant, or seminal, some of which are older than five years. For a variety

of databases, I established several email alerts to be delivered weekly for all the newly published articles using my parameters and keys words and key phrases. From these new articles, I screened for possible applicability, noting their references to identify recurring literature that may be considered seminal to the topic. Dissertations were considered for several reasons: (a) to use as a model for structure, (b) to obtain secondary sources when possibly applicable to expand literature search, (c) to get ideas for methodology, (d) to discover if anyone has a similar research topic and/or question, and (e) to identify how to narrow the topic.

Initially, the focus on the search was using Google Scholar and ProQuest, two very general databases, to discover the breadth of literature for a particular topic, starting with literature on how health policy and the built environment affected chronic illness using the key words *health or health policy, built environment, real estate finance, and chronic illness*. I then focused on a consistent finding in the literature that identified several social, biological, and systemic factors that impact chronic illness. External factors included the media, advertising, and the influences of the food industry (Cardello, 2009; Holder & Treno, 1997; Martin & Mail, 1995; Thompson & Heinberg, 1999). Other social factors included culture, education, child welfare, employment, and socioeconomic status (Braveman, Egerter, Woolf, & Marks, 2011; Delaware Coalition for Healthy Eating and Active Living, 2011; Shi & Singh, 2012). Biological factors included genetics, body type, and metabolism (International Association for the Study of Obesity, 2012). Even the health care system itself contributed to chronic diseases

through flawed health policy, limited access to health care, health disparities, reliance on the pharmaceutical industry (Campbell & Jacobson, 2013; Gearhardt, Grillo, DiLeone, Brownell, & Potenza, 2011; Nestle, 2007; Shi & Singh, 2012), and the exclusive focus of health promotion programs on the individual, not of the community (Syme & Ritterman, 2009). The physical and social environments have a greater influence on health than any medical interventions (Roseland, 2005). More recently, the environmental issues of food availability and presence of food deserts have also been identified as influences on health behavior and negative health outcomes (Chow et al., 2010; Mikkelsen, 2011). The U.S. Department of Agriculture (2013) defined food deserts as urban and rural areas with limited or no access to fresh, healthy, affordable fruits and vegetables. Hence, where one lives is a key influence on one's health, and improvements in community development serve to improve health outcomes and decrease health disparities (Bell & Rubin, 2007; World Health Organization, 2008).

Where one lives as a contributor to chronic illness has been examined by several researchers outside of the health care field. Subsequently, my next refined literature search using the key words and phrases *built environment*, *APA*, *chronic illness*, *development financing*, *lifestyle disease*, *public health*, and *population health* and a variety of combinations thereof also proved to still be too broad. Therefore, I reduced chronic illness to obesity, diabetes, diabetes, physical activity, physical fitness, exercise, diet, weight loss, and nutrition. Although over 5,000 references included these key words, I noticed a researcher's theme identifying the need for nationwide complete

communities, healthy communities, smart communities, smart growth, sustainable communities, TOD, and TND (Cassidy, 2011; McConville, 2013). While these terms have subtle differences, their core premise is that wise land-use decisions is a collective planning effort needed to ensure that the physical, social, and built environment encourage strong communities, promote health, and sustain economic growth (Meridian Planning Consultants, 2011; Scott, Nau, & Anderson, 2012).

The fourth keyword/phrase approach included *complete communities, healthy communities, smart communities, sustainable communities, smart growth, New Urbanism, urban sprawl, TND, walkable urbanism, TOD*, and a range of chronic illness keywords, but this search included the aspect of economic development and finance policy. Each of these combinations returned a range of 22 to 254 references from a variety of databases. However, more specificity was needed since economic development alone returns a large list of articles.

This final keyword/phrase search found a definitive gap in the relationship between the built environment, chronic disease, metrics, and the role of capital. Many sources referenced the important need to develop healthy communities for reducing chronic illness and the need for establishing public and private partnerships, obtaining community involvement, coordinating a variety of governmental organizations, reevaluating zoning policies, and planning considerations. Few studies were found to describe financial challenges of the complete community and healthy community endeavor and even fewer addressed challenges from the real estate developer perspective.

Thus, the keywords of *investor, banking, funding, capital, capital investment, banks, banking policies, commercial bank loans, residential bank loans, real estate finance policy, zoning, comprehensive planning*, and combinations thereto were used in conjunction with other key words noted earlier. Relevant secondary sources identified in journal articles and books were also used.

Because there was little current and/or published research relating entrepreneurs, SEF, funding, healthy communities and/or health outcomes, I studied several seminal authors, speakers, and researchers in the area of healthy communities in general to include Dan Burden, Executive Director of Walkable Livable Community Institute; Christopher Leinberger, Arcadia Land Company; Charles Lesser, founder of the largest independent real estate consulting firm in the country; the Robert Wood Johnson Foundation; the Brookings Institute Center on Urban and Metropolitan Policy; the ULI; Smart Growth America; and the APA. The aforementioned names were also used as keywords. To validate a potential gap in knowledge, I attended several meetings discussing the state's complete community plans, attended an APA Regional Conference *Planning for Healthy and Sustainable Places*, and informally spoke to the Delaware Planning Director and Principal Planner. There was a gap in the literature regarding the challenges of funding, zoning, and outcome metrics that support complete and healthy community development along with the impact on health outcomes. The research question for this study included a relational inquiry of funding and zoning policies, a comprehensive plan, real estate developers' decisions, and the built environment.

One theory suggests that New Urbanist developers are entrepreneurial (Chell, 2007), but research on this contextual framework is lacking. Healthy community developers and investors can be seen as entrepreneurs, going against the current methods of the built environment and taking risks for the greater societal benefit (Duany, Plater-Zyberk, & Speck, 2000). The contextual framework that this study is grounded in is the SEF (also known as social ecological model). The SEF considers the built environment and its impact on health and chronic illness. As a result, theories and the framework were searched in relationship to several of the key words and phrases already discussed in addition to entrepreneur, social entrepreneur, social health theory, social environmental framework, and social environmental model, macroeconomics, microeconomics, triple bottom line, economic development theory, capitalism, economic planning, health belief model, planning theory, theory of reasoned action, theory of planned behavior, transtheoretical model, social determinant theory, social cognitive theory, social capital, social ecological foundation, social ecological model, and eco-development.

Conceptual Framework

There are two major approaches to a social ecological framework (or model, SEF or SEM). First for consideration was those ideas derived from Bronfenbrenner (1994). The second thinkers contributing to the SE framework are McLeroy et al. (1988) and Stokols (1996). First introduced in the 1970's, Bronfenbrenner described the five interlocking spheres of influence of microsystems, mesosystems, exosystems, macrosystems, and chronosystems that fit together like "Russian dolls" (1994, p. 1645).

The microsystems are the immediate environment such as family, school, and work; mesosystems comprise linkages and relationships of microsystems such as family and school, school and workplace, and family and workplace. Exosystems identify the linkages between mesosystems that can indirectly influence a person in a microsystem, such as the effect on a child as a result of the relationship between the home and parent's workplace. Macrosystems are the umbrella over the micro-, meso-, and exosystems link at the level of culture, belief systems, "bodies of knowledge, material resources, customs, lifestyles, opportunity structures, hazards, and the like course options" that can be thought of as a "societal blueprint" (p. 1646). Lastly, chronosystems consider changes or consistencies of an individual and their environment over the course of his lifetime. Although Bronfenbrenner's (1994) paradigm does not directly relate the built environment to health, it nonetheless provides an ecological framework that helps support and guide human growth and development.

Other researchers have built upon Bronfenbrenner's model (1994). McLeroy et al. (1988) acknowledged that since 1968, public and private initiatives for health promotion and disease prevention activities may have focused too much on individual lifestyle interventions while missing the influences of social environmental factors. The social ecological framework/model considers all factors of "behavior as being affected by, and affecting the social environment" (McLeroy et al., 1988, p. 354). Later, Stokols (1996) expanded upon these multifaceted environmental factors, and these researchers are generally grouped together because of their similarity of thought. The social

ecological framework allows an understanding of the behaviors and interactions of individuals, groups, and environmental conditions (Busza, Walker, Hairston, Gable, Pitter, Lee, ... & Mpofu, 2012; Golden & Earp, 2012; Haggis, Sims-Gould, Winters, Gutteridge, & McKay, 2013).

McLeroy et al. (1988) and Stokols (1996) both described the taxonomy of the five levels of influence on behavior (see Figure 3, Appendix B). The five levels of behavior influence included intrapersonal factors and well-being, interpersonal processes of person-environment relationships, institutional factors of behavioral and organizational opportunities for change, community factors and interdependencies between individuals, groups, and their life settings, and public policy of the totality of “biomedical, behavioral, educational, environmental, organizational, and regulatory interventions” aimed at health promotion outcomes (Stokols, 1996, p. 289).

Figure 3 depicts the SEF interconnectedness and provides an example of how the SEF related to this research study. At the basic intrapersonal and individual level, access to different levels of education, income, and housing may affect motivation, beliefs, and behaviors about fitness, nutrition, health and well-being and medical care. The basic principle of where one lives matters is first considered here. At the interpersonal processes and primary groups and relationships level, effective messaging and network and relationship development can have an influence on healthy eating, physical activity, and well-being. A larger scope still, the institutional factors and organizational social institutions can develop workplace and community wellness programs and activities,

healthy school lunches, and nutrition and fitness education that support both the individual and their associated group toward healthy lifestyle choices. With these organizational programs in place, community factors can focus on safe, accessible, and reliable transportation, fitness and recreation opportunities, and availability and affordability of healthy fruits and vegetables that can further facilitate behavior change and promote healthy eating and physical activity. Lastly, to solidify these supportive activities, public policy can be created to consider the built environment design such as complete communities having outlets for healthy fruits and vegetables, and construction of safe green space and walking/biking lanes that can promote and support healthy eating and active living. This study focused on the built environment relative to community factors and public policy levels.

Phenomenon Applied

Adding to the social ecological framework, Stokols (1996) was one of the first researchers to recognize that improving urban planning strategies could enhance health promotion programs. SEF evaluates behavior on all levels; therefore, interventions for behavior changes need to be done on a variety of levels (Sallis & Glanz, 2009). Lytle (2009) used SEF to include “transportation, urban planning, agricultural policy, social networks, sociology, psychology, and biology [in a] transdisciplinary approach” (p. 339) to study intervention effectiveness in childhood obesity, and although considered important, community land use policies were not included.

Grzywacz and Fuqua (2000) summarized the definitions of Stokols (1996) and McLeroy et al. (1988) and simply stated that the comprehensive view of health from an ecological perspective includes “an interdependent, multidimensional, multilevel, interactional view of the etiology of individual or community health” (p. 102), but this could not be used to change behavior. Further, twenty years after the McLeroy et al. (1988) research, Golden and Earl (2012) examined and coded 157 intervention articles and determined that these programs focused on individual and interpersonal factors, rather than institutional, community, and public policy factors.

The social ecological framework indicates health is nonlinear, multifaceted, and complex, considering “policies, programs, behaviors, environments, and community norms” (Swinburn, Gill, & Kumanyika, 2005, p. 24), making modeling and understanding challenging. Simulation modeling and comparative modeling may have potential to bridge theory and research with practice and outcomes, can integrate several fields of study to help understand the problems and outcomes holistically, and can quantify and forecast possible policy solutions (Levy, Mabry, Wang, Gortmaker, Huang, Marsh, ... & Swinburn, 2011).

Modeling the built environment where people live, work, go to school, and play in relationship to health and healthy behaviors can identify opportunities for improved outcomes via supportive policy, in early intervention and over time. Gortmaker et al. (2011) modeling holistically and synergistically, the overall strategy for initiatives and solutions with government, international agencies, the private sector, civil organization

groups, health professionals, and individuals. Absent from their identified players include financiers, planners, and developers. Researchers agree that health should be included in all policy making (Adler, 2012; Gortmaker et al., 2011). Further, leadership and action is required from all sectors; the medical community can no longer be responsible for addressing all the social determinants of health especially when they fall in the realm of different disciplines (Lavizzo-Mourey, 2012; Williams & Marks, 2011).

What continues to be lacking is research on policies focused on the built environment within the social ecological framework in relationship to population health and how real estate developers, acting as social entrepreneurs, can enact social change. Because SEF is an approach that considers all factors that have an effect on an individual's behavior, changes to environment or policies affecting whole communities are more likely to be sustained (Handy, 2005; Sallis et al., 2011). These changes are also more often becoming evident in public and private investments (Miller et al., 2011). Gladney (2014) furthered collaborations to the private P5, that includes public, private, non-profit, philanthropic, and people to insure successful placemaking (Project for Public Spaces, 2015). In the early phase of policy development, SEF and planning theory should be considered to determine the long term and/or unintended consequential health impacts of the policy on population health. Furthermore, SEF and planning theory combined sets the framework in researching how and if real estate developers, investors, and capital funding impact population health by changing current thought paradigms, investment

strategies, and public policies to those stakeholders that consider the environment and healthy communities (Trivedi, 2010; Trivedi & Stokels, 2011).

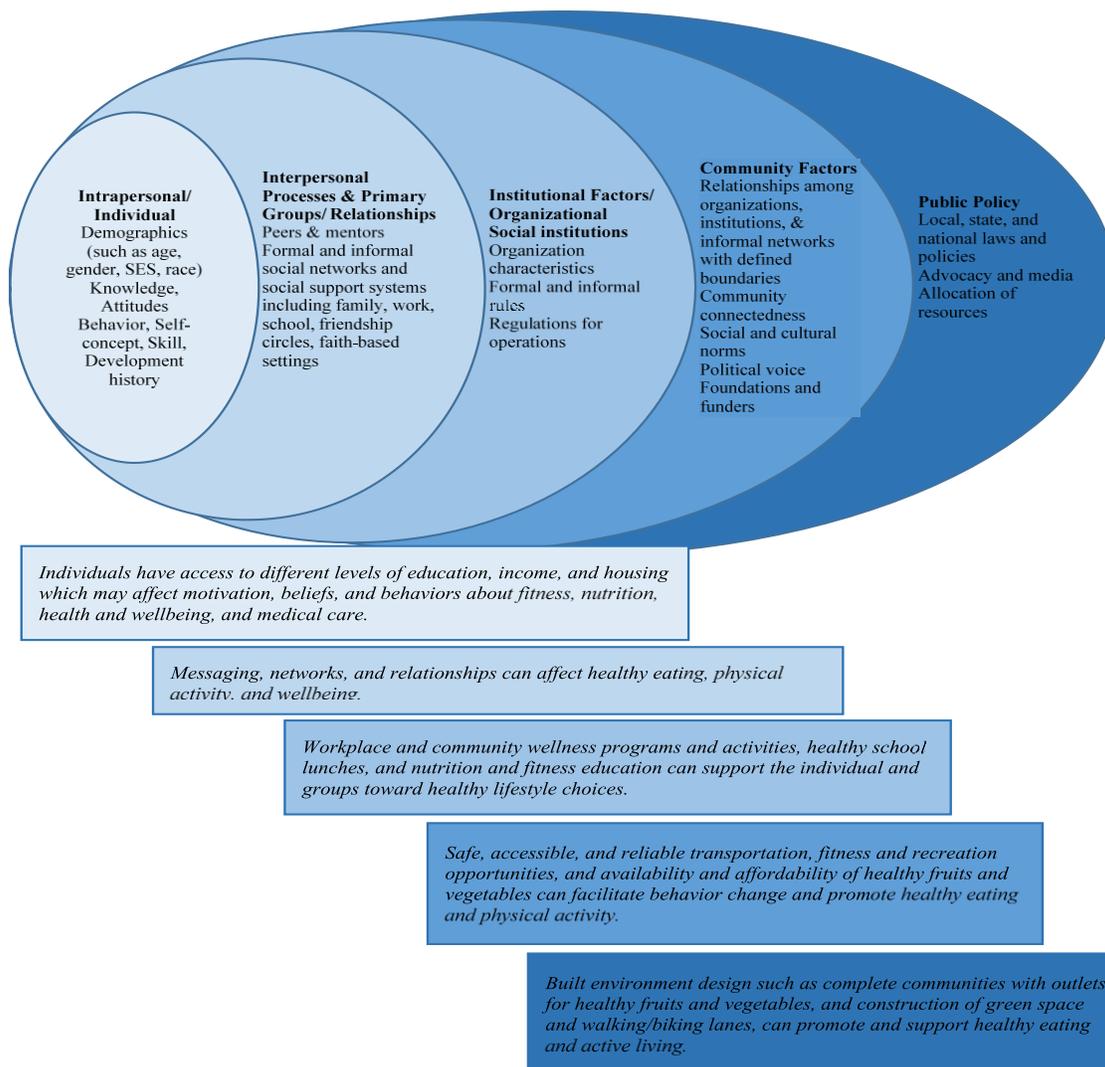


Figure 3. Ecological approach. From “An Ecological Perspective on Health Promotion Programs,” by K. R. McLeroy, D. Bibeau, A. Steckler, and K. Glanz, 1988 *Health Education Quarterly*, Volume 15, p. 355. Copyright 1988 by SOPHE. Adapted with permission.

My study contributed to and benefitted from the social ecological framework by identifying promotors and barriers to real estate developers to create healthy communities. These real estate developers can be viewed as social entrepreneurs (SEs). As such, SEs strive to create social change through innovation to minimize socio-economic issues, either on a small localized scale, or on a large scale population (Trivedi, 2010) from which SEF provides an opportunity within which social entrepreneurs can work. My study evaluated how the institutional environment, community, and public policy factors interact with real estate developers to improve population health by maximizing the health benefits of the built environment. Lastly, my study added to the Institute of Medicine's "Guide to Community Preventive Services: Sociocultural Environment Logic Framework" (2002) by examining a pathway that the researchers had not been previously examined (that will be discussed in Figure 5).

Theoretical Foundation

I conducted my research for this study using the urban planning theory and New Urbanism in the United States. In this study, urban planning theory argues that several factors affect health through built environment. Urban planning or spatial planning theory attempts to explain a variety of social issues involved with urban development in order to invoke social control or reform (Yiftachel, 1997). With this view, urban planning could be used as an effective tool for positive social change.

Elusive and nonexclusive, planning theory encompasses a variety of disciplines across a continuum and as such holds a different definition for each practitioner

(Abukhater, 2009; Fainstein & Campbell, 2012). Fainstein and Campbell (2012) considered planning theory within the context of “political economy, history, and philosophy” (p. 5) that is flexible enough to create good places in any city and region. Similarly, Hoch (2011) suggested planning theory shift from concept to producing better plans by integrating “geography, economics, history, sociology, architecture and other disciplinary” (p. ix) theory ideas to solve complex special problems.

According to Slusser, 2007, there are a variety of major planning theories, including the Rational Planning Model from Myerson and Banfield (1959) that represented a scientific, logical, and bureaucratic theoretical approach engrained in planning education by the 1980s (Innes & Booher, 2014). Other approaches include Incrementalism from Lindblom (1959); Advocacy Planning from Alinsky (1946), Davidoff (1965) and Arnstein (1969); Transactive Planning (Friedmann, 1973); and Radical Planning (Grabow & Heskin, 1973. More recently, the communicative planning theory (Archiesta, 2012; Douthat, 2013; Forester, 1982), the New Urbanism theory (Duany, 2001), and the Just City theory (Fainstein, 2010) have become popularized (Fainstein, 2000; Innes & Booher, 2014). This research focused specifically on urban planning theory and New Urbanism. Historical accounts focus on those events that build up to this theory.

Origins

Early planning in the United States began in 1682 with William Penn’s grid pattern for his holy experiment in Philadelphia. In 1790, F.L. Olmsted, Sr., designed the

first major purchase of parkland—Central Park in New York. In 1791, L'Enfant planned Washington, DC. Laws such as the 1862 Homestead Act signed by Abraham Lincoln that transferred land in the public domain to private citizens to make improvements toward ownership (National Park Service, n.d.; The Library of Congress, 2015). Another piece of legislation signed by Lincoln was the Morrill Act of 1862 that provided state public lands for the creation of universities specifically teaching agriculture and mechanics (O'Hara, 2015). During this period, a shift from agrarian to rapid industrialization necessitated a variety of reform efforts (Campbell, 2015; O'Brien, 2011; Slusser, 2007). Planning and public health were well aligned and focused on minimizing infectious disease in living spaces using a Haussmann model of planning that stressed single use zoning in alignment with economical functions (Coburn, 2004).

The theory of planning and planning as a profession arose from three distinct periods. The first phase was the progressive years of the late 1800s – circa 1910 were the formative years with people outside of the traditional planning profession community, such as Howard with the Garden City Movement, and Burnham's first US metropolitan plan in Chicago. Planning commissions were independent from government and composed of community citizens (O'Brien, 2011). The Garden City Movement, attributed to Howard, was an anti-urban effort to keep focus on the beauty of nature by returning to the pre-industrial village. In 1909, the lead American planner at the time, Burnham designed the first US metropolitan plan in Chicago. During this time,

government involvement increased in public health initiatives to insure sanitary conditions in cities for pollution, cemeteries, and tenement living (O'Brien, 2011).

The second phase took place circa 1910 – 1945 when the profession of planning was recognized with an increase in regional and federal planning initiatives. In 1916 the first comprehensive zoning ordinance was passed in New York that established a maximum height on skyscrapers to ensure light and air could reach sidewalks (Dolkart, 2003). The establishment of the American City Planning Institute in 1917 (which would be renamed the American Institute of Planners in 1937, and eventually merged into the APA in 1978) focused on public policy and legislation to advance an organized approach to city planning (Hooper, 2000). Primarily due to the city's rapid growth, a newly formed Los Angeles County Regional Planning Commission (LACRPC) developed the first comprehensive plan in 1922 that primarily focused on land use, traffic and flood control (Gish, 2012). Cincinnati's first comprehensive plan in 1925 was built based on the benefit of the city as a whole. The same year as the Stock Market Crash in 1929, Harvard created the first school of city planning with funding from the Rockefeller Foundation (Campbell, 2015). Wright's Broad Acre City in 1932 presented one of the first anti-urbanism, non-TOD theory developments, and focused on transportation by automobile and confined pedestrian mobility to where the majority of the population lived. Hoyt's Sector Theory of 1939 modified Burgess' Concentric Ring Theory of 1925 to allow for an outward progression of growth.

The economic collapse and the consequences of the Great Depression created the New Deal, housing and work/welfare programs, and the emergence of modern rationality planning theories. The New Deal included the National Industrial Recovery Act (NIRA) of 1933. The NIRA among other things, restructured the industrial sector of the economy to favor a public works program, that was later ruled unconstitutional (AmericanPresidency.org, 2014; The Social Welfare History Project, 2014). The New Deal also initiated housing and work/welfare programs, including Medicaid, food stamps, and Supplemental Security Income (SSI) (Georgia Planning Association, 2012). O'Brien (2011) and Stiftel (2000) agree that toward the end of this period and into the next, modern rationality planning theories emerged from Perloff (Burns & Friedmann, 1985), Banfield (1959), Margolis (1958), and Myerson that set the course for future planning theories. Simplistic, yet unachievable due to demands on human resources, rational planning theory was a step by step approach to problem solving in the public sector (O'Brien, 2011; Stiftel, 2000).

The third and final phase began post-World War II that was an era of standardization with the controversial 1949 Wagner-Ellender-Taft Housing Act that created the American dream of home ownership and provided federal funding to insure that all Americans had a good home and living environment (Lang & Sohmer, 2000; Martinez, 2000). It also provided low income housing while concurrently clearing slums that actually destroyed affordable housing units (von Hoffman, 2000). The 1954 Housing Act differed in that it focused on slum prevention by eliminating public housing, and

urban renewal through commercial enterprises (Flanagan, 1997). During this time, Lindblom (1959) furthered the incremental planning theory that stressed that policy decisions are best created through democratically allocating, delegating, and integrating decisions of others and considering all possible solutions. Compared to other evolving theories, Hudson, Galloway, and Kaufman (1979) stated that transactive planning furthered integrative planning by considering the effects on people and their organizations rather than just simply the neutral economics of individuals. Further, although advocacy planning considered an organization's profitability objectives, it considered the community and their public concerns, and stressed the formulation of policy inclusive of social justice principles (Hudson et al., 1979).

The current methods of planning continue to be a reflection of the late 1950s. The development of Levittown in Bucks County, Pennsylvania, was recognized as the first of the modern American suburb and led the Postwar Consumer Society (American Planning Association, 2004; Campbell, 2015; Campbell & Scott, 2012; Slusser, 2007). During the late 1950s and through the 1960s, new town projects began to flourish, including the first age-restricted retirement community in Youngtown, AZ, the first enclosed shopping mall in Edina, MN, Research Triangle Park in Raleigh/Durham/Chapel Hill, NC, and the first active living retirement community in Sun City AZ. Many of the early planning pioneers published works during the Urban Crisis and LBJ's Great Society of the 1960s. The urban planner entrepreneurs of today derive their design principles from Jacobs, whose book, *The Death and Life of Great American Cities* (1961) is seminal for "advocating for

a place-based, community-centered approach to urban planning” (Project for Public Spaces, n.d., para.1). Many of the early planning pioneers published work during the Moral Environmentalism, Urban Crisis and Lyndon B. Johnson’s Great Society of the 1960s. Planners focused on large infrastructure and transportation projects and on social unrest and public development projects. The public health message emphasized a change to one’s individual risk factors and behavioral modification rather than the social aspects of health promotion (Coburn, 2004).

Theory in the last 50 years has considered the social aspects of community. The 1970s Environmentalism period shuttled in the National Environmental Policy Act, the National Environmental Protection Act, the Housing and Community Development Act, and a myriad of other publications on planning theory. Although the first New Urbanist town was built in Seaside, Florida, during the Reagan/Thatcher Post Modernism years of the early 1980s, the focus on resources and efforts was moving away from urbanization to suburbanization. Public health further narrowed the focus on illness being a biomedical result. From this time until present, there is a focus on globalization and sustainability, including the founding of the CNU. It is during this time that the Healthy City Movement of the World Health Organization (WHO) was founded to emphasize a “place-based approach reflecting a holistic-system based model” in urban settings (UK Healthy Cities Network, n.d., para. 1). In 1989, these WHO concepts were forwarded by the US Department of Health and Human Services by launching the US Healthy Communities Initiative, that serves as the basis for today’s community based planning

(Norris & Pittman, 2000) and view of the social influences of health. Lastly, Sager (2001) described four positive planning theories based on social choice: Public choice theory, transaction cost theory, property rights theory, and regime theory.

Fainstein and Campbell (2012) considered planning theory within the context of “political economy, history, and philosophy” (p. 5), that is flexible enough to create good places in any city and region. Similarly, Hoch (2011) suggested planning theory shift from conceptualizing to producing better plans by integrating “geography, economics, history, sociology, architecture and other disciplinary” (p. ix) theory ideas to solve complex special problems. As such, urban planning theory, and the movement of New Urbanism, features “high-density, transit-and pedestrian-friendly neighborhoods” with multi-use zoning, sustainability, and affordable housing to address an antidote for sprawl (Fainstein & Campbell, 2012, p. 13) and a public health approach to where people live, work, and play (Barton, 2005).

Theoretical Propositions

Urban planning theory, and the movement of New Urbanism, features “high-density, transit-and pedestrian-friendly neighborhoods” with multi-use zoning, sustainability, and affordable housing to address an antidote for sprawl (Fainstein & Campbell, 2012, p. 13) and a public health approach to where people live, work, and play (Barton, 2005). Generally, practicing planners scoff at using theory while academics rely on them heavily, thus creating a gap (Abukhater, 2009). In an attempt to integrate theory with practice, CPT confronted long term assumptions of planning because it considered

other social theories and disciplines that are involved in and collaborate with the planning process (Innes & Booher, 2014). Pissourios' (2013) findings rejected the use of CPT as a useful planning theory because it does not use analytical indicators and therefore does not link theory with practice. And as a "planning concept," Warner (2006, p. 169) was critical of Smart Growth because it does not have its basis in a planning theory, simply because, at some point, there is an end to growth and sustainability must be considered.

For New Urbanism to be more desirable, designers and architects must collaborate with real estate developers and policy experts for innovative planning that joins economic profits within regulatory confines (Love, 2012). Planning theory must consider the circumstances by which planners and stakeholders can produce a better environment for the people living there (Fainstein, 2012). Developing a community for success is an entrepreneurial venture (Duke, 2012). When thinking of development in an entrepreneurial way, many of the planning entrepreneurs derived their community's development design principles from Jane Jacobs, whose book, The Death and Life of Great American Cities (1961), is seminal for "advocating for a place-based, community-centered approach to urban planning" (Project For Public Spaces, n.d., para.1).

Rationale for Choosing This Theory

While Fainstein and Campbell (2012) indicated that planning theory is a continuum of a multitude of professions, Kent and Thompson (2012) further supported the development of health planning as an interdisciplinary profession, to further align public health, urban planning, and academia. Sallis et al. (2006) also supported a

collaborative approach of “research, practice, and policy change” to promote active living (p. 298). In spite of this multidisciplinary attention to planning, cities still experience “chronic urban problems” because there is no integrated approach to complex urban planning (Abukhater, 2009, p. 66). Because the built environment has been shown to have an impact on human health, it follows to use urban planning theory to consider the development of where people live, work, and connect (Kent & Thompson, 2012). However, Grant (2009, 2012) identified in her studies with Canadian real estate developers that planning theory and real-life development practice have not coalesced.

How Theory Relates to This Study

By collaborating with other professionals in a planning process, a healthy built environment theoretically can include those items that support health, such as physical activity, access to healthy food choices, safety, and affordable housing. Kent and Thompson (2012) suggested stakeholders define their role for a healthy built environment, identify regulatory conditions, and demonstrate when policy change is needed. While professionally trained to focus specifically on the physical built environment, planners can also leverage theory and practice to facilitate changes in zoning, building codes, and land use (Sallis et al., 2006).

There is even debate as to the usefulness of comprehensive plans. The old school of thought supports it as a necessary tool to incorporate the “social, economic, and environmental” goals of a region, while newer planners argue that comprehensive plans are too extensive and detailed and incorporate too many aspects of the environment to

make them realistically achievable (Abukhater, 2009, p 68). To investigate this debate further, comprehensive plans were one of three IVs studied in this study.

Literature Review Related to Key Concepts

The key concepts identified in the literature described possible factors influencing real estate developer's decisions affecting the built environment and what gets built. Other persuasive dynamics that affect other stakeholder to include healthy communities and the impact on public health; the correlation of where people live and work and impact on health; the policies that support the built environment and hinder or facilitate change; how socioeconomics impacts health negatively; how a community atmosphere improves health; and how the current built environment and sprawl cannot be sustained. Figure 4 (LaRue and Healy, 2016, p. 1). is a summation of the interactions between zoning and regulations, market and land value, and consumer preferences and what gets built (see Appendix C). This literature review described how researchers have approached these integral issues and how this study built on these areas and tied them together.

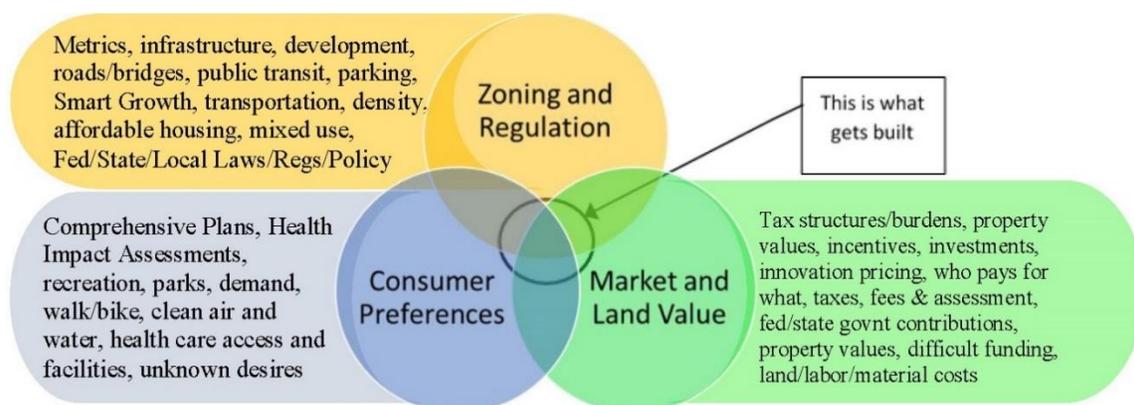


Figure 4. What gets built. From “Meet Me in the Middle: Supply Trends, Factors, and Product Considerations Impacting Homeownership Affordability Today” by T. LaRue and C. Healy, 2016 The Advisory February 25, (p, 1). Copyright 2016 by RCLCO. Adapted with permission.

Zoning and Regulation

Metrics. There is agreement of the feasibility and value of performance measurements or outcome metrics for health care, health promotion, and health intervention. However, obtaining these measurements continue to be a challenge due to the lack of a standardized and systematic criteria, study design and evaluation, scientific rigor, mathematical formulas, and/or comprehensiveness of studies (Eddy, 1998). In their literature review of public health interventions between 1980 and 2001, Merzel and D’Afflitti (2003) found no consistency in study design and evaluation, measurement tools, and/or theoretical models in over 30 categories of interventions. This suggests the necessity of better outcome metrics for population health and health promotion programs to determine the success or failure of the intervention. Similarly, measuring healthy outcomes and performance is allusive with regard to the built environment. Warner (2014) indicated that the perfect and most valuable indicator— that has specificity,

responsiveness to change, reliability, validity and influential and effective to produce change— has yet to be found.

Metrics could provide long term strategies for success. Facilitating performance metrics is just one innovation in urban planning that insures accountability, transparency, and momentum for established indicators (Vaggione, 2012). Ewing and Hamadi (2014) identified the research demand for built environment metrics, especially in metropolitan, urban, and sprawl areas, but their suggested metrics still lacked relationships and predictors of outcomes. Leinberger and Alfonzo (2012) also identified the lack of standardized performance metrics for TNDs has hindered their growth, support for financing, and development of public policy, they proposed metrics for “private developers and investors, social equity advocates, the public sector, place managers, and citizen-led groups/activists” (p. 12). The difficulty with these metrics is that it takes a long time to collate the data to describe how these new complete community projects perform in the market (Leinberger, 2008).

Data on current TOD/smart growth communities to use for standardized formulas, measurement, and guidelines are needed (Cervero & Seskin, 1995; Lang, LeFurgy, & Homburg, 2005). Sallis et al. (2012) suggested cost-benefit analysis to measure the effectiveness of physical activity promoting infrastructure in relation to overall public health and reduction of chronic illness, especially in lower socioeconomic groups. Metrics facilitate a focus, a common goal, and measurements of success to inform policy

makers and stakeholders that programs are making a positive change, so that investors would be more willing to provide funding (Donovan, Duncan, & Sebelius, 2012).

While standardized metrics for sustainable development are required for “supportive policy, planning, and investment,” Lynch, Andreason, Eisneman, Robinson, Steif, & Birch (2011) reviewed 22 systems with 377 indicators to conclude that the 145 reasonably valuable indicators were still limited to accurately measure and understand the activities necessary to develop best practices for social well-being, environmental quality, and economic opportunity (p. 2) within the framework of the Partnership for Sustainable Communities’ Livability Principles (US Department of Transportation, 2015).

Acknowledged by Lynch et al. (2011) to be a gap in understanding of interactions between the three dimensions of urban development sustainability, my study furthers the field of urban development sustainability by focusing on the indicators of health via social well-being, and the economic opportunity of access to credit and capital, and moderating variable of environmental quality.

Social entrepreneurs, finance, and metrics. The causal link between real estate developers and market demand is well established (Grant & Gonzalez, 2012; Leinberger, 2008; Talen, 2013). The causal link between entrepreneurial real estate developers’ funding and smart growth and cost benefits is less well understood. Although the Environmental Protection Agency (EPA) continues to study this phenomenon (EPA, 2012), quality research directly related to funding Smart Growth development is lacking, especially for mixed income housing. This research needs to identify what customers

want, the negative and/or positive impact on economic development, and cost benefit analyses for traditional New Urbanism development methods (Gyourko & Rybczynski, 2000). Steffel Johnson and Talen (2008) conducted a survey of 84 real estate developers from 31 states that have successfully employed a broad range of “public subsidies, incentives, [and/or] non-profit sector support” (p. 584) to use as benchmarks for future New Urbanist developers. Of the 55.6 percent that included affordable housing, 78.6 percent of these respondents reasoned it “fill[ed] a community need,” and 26.2 percent because these units provided them “a financial incentive,” a variety of other reasons were also stated including “it was part of their corporate mission” (p. 592). On the other hand, 44.4 percent of the surveyed developers did not include affordable housing in their projects. Reasons for the exclusion included “inappropriate mix...project requirements were prohibitively expensive...[and] affordable housing could not bring enough profit.” Other reasons included “excessive impact fees, a limited ability to make the architectural modifications needed for cost-effectiveness, the inflexibility of government programs, and the ability to pay cash to local governments in lieu of providing housing units” (p. 596). In order to overcome these exclusionary reasons, New Urbanist developers innovate with a combination of public programs, not for profit organizations, and unique designs to insure affordable housing is included in their housing projects.

Discovering the linkages between how investment in smart growth initiatives and population health can have the potential to improve lives while generating socially responsible and profitable financial, social, and environmental returns. The US’ health

care costs are unsustainable; a metric based on the built environment's influence on health outcomes may be an innovative way for public and private payers to incentivize health care expenditures (Adler, 2012; Robert Wood Johnson Foundation, 2009). Further, there can be financial and human profitability in investing in enterprises that solve social problems and deliver self-sustaining programs (Ruttman, Elmer, Fleming, & Hemrika, 2012). Although there are increasing opportunities to invest in social change enterprises, there is no fund that focuses on real estate and health to invest for impact. Ernst von Kimakowitz, the director and co-founder of the Humanistic Management Center in Switzerland, recognized that "business as usual is no longer an option" resulting in more traditional investors interested in transformational, "for-profit, socially driven businesses" (Ruttman et al., 2012, p. 16); therefore, more impact investment vehicles, public-private partnerships, and private-government partnerships are evolving to create innovative financing instruments. One such example are community development financial institutions (CDFIs) that concentrate private capital with government tax incentives and subsidies (Belsky & Fauth, 2012). These socially motivated investors want to know what their money accomplished relative to financial return and social return (Erickson, Galloway, & Cytron, 2014).

Policy. With any building project, there are standard rules that must be followed. In establishing TND projects, developers and builders experience most challenges with local regulations, such as zoning, parking, subdivision regulations, mixed-use development, lack of public support for Smart Growth principles, and financing (Kirby &

Hollander, 2004; Leinberger & Alfonzo, 2012; Parker, McKeever, Arrington, & Smith-Heimer, 2002). Restrictive zoning regulations and subdivision controls relating to density and mixed-use land impact health and physical activity with the built environment (Schilling & Linton, 2005; Transportation Research Board, 2014). Regulatory and policy issues impede investors with regard to the belief that only nonprofit organizations and the government can invest in programs addressing social issues (Bugg-Levine, 2012), but cross-sector collaboration of all stakeholders is critical to improving health through community development (Lavizzo-Mourey, 2012; Erickson et al., 2012). Social enterprises fill in the gap created by a current economic system and policies based solely on financial results and the government provided spending and aid (The Schwab Foundation for Social Entrepreneurship and the World Economic Forum, 2013). These policies do not consider positive social or environment impacts of these enterprises. Besides social investors, it is important for policy makers to understand and appreciate their ROI in enacting legislation but few interventions or policy changes present a rigorous economic evaluation (Ananthapavan, Sacks, Moodie, & Carter, 2014; Moodie, Sheppard, Sacks, Keating, & Flego, 2013).

With the institutional, political, economic, and socio-cultural barriers to transforming communities with smart growth principles, a greater involvement and authority from local governments may be needed to alter public perceptions and fiscal policies (Grant, 2009). LOCUS is a coalition of more than 250 real estate developers and investors who advocate for sustainable, walkable development to create economic and

environmental opportunities in the United States and help guide how federal and state policy is set and funds are allocated. LOCUS advocates for federal tax policy changes, lending and spending policies, and loan guarantees that support the expanded development and growth of healthy communities throughout the United States (Smart Growth America, 2014).

Hence, in determining public health investment funding at the state and local levels, Levi, Juliano, and Richardson (2007) identified the lack of transparency in public spending on programs, no accounting system for federal public health grants, and no outcome measurement on how this grant money has met health needs and expectations. Bacon (2013) proposed a funding distribution change for government funding to be prioritized to those projects that have the highest rate of return as measured by ameliorated congestion, improved safety, reduced pollution, and creation of jobs. Bacon (2013) also advocated significantly less governmental regulations for land use.

Kent and Thompson (2012) acknowledged that an acceptable healthy built environment may be economically risky, politically challenged, or affects the environment negatively. A built environment can promote or hinder physical activity. Although a healthy built environment has been legislated in many states, stakeholders who include developers and financiers, are motivated by market conditions. Perhaps the entrepreneurial developer will consider the cost benefit analysis of health care cost savings when using Smart Growth principles in building a healthy built environment.

There have been a variety of initiatives that have changed land zoning and financing policies. In 1992, Augusta-Richmond County (Georgia) initiated a downtown revitalization project that included housing rehabilitation and changes to zoning for residential and mixed-use space with an emphasis on “green and healthier living” by providing “incentives for private investments...to include low interest loans and assistance to commercial property owners” (Horton, Kashdan, & Nothstine, 2013, p. 13). Other initiatives include Community Benefit Agreements (CBA) as seen in Sonoma Mountain Village (SOMO) in Rohnert Park, California. Legally binding, CBAs are a project-specific agreement between a developer and a community coalition that specifically addresses how the developer will meet the community needs and garner support thereto. CBAs are advantageous to a community because they maximize government return on investment, hold developers accountable to fulfill their commitments, support smart growth principles, and proceed more quickly than traditional development processes (Partnership for Working Families, 2012). A CBA also details the specifics for affordable housing as seen with the SOMO project (Hammer, Babcock, & Moosbrugger, 2012).

Today, there are more jurisdictions that have updated their zoning ordinances to be more accommodating to TNDs (Ewing et al., 2014). The efforts put forth by the Partnership for Sustainable Communities has stimulated HUD’s Federal Housing Administration (FHA) to be more flexible in their zoning to allow for commercial and

residential uses and relax the building height regulations in mixed use communities to best meet the needs of that community (Environmental Protection Agency, 2014).

Smart growth, zoning, and transportation policies. Smart Growth principles have been included in urban planning for more than a decade. These principles are an effective tool for planning and land use policy (Hawkins, 2011). Through their literature search findings, Kent and Thompson (2012) identified that Smart Growth legislation has been a positive step toward building healthier communities. Further, when land use governance operates in conjunction with a healthy built environment plan, it not only supports physical human health but has a positive effect on climate change.

Sallis et al. (2006) recognized the influence of “zoning, development, land use, and transportation regulations” (p. 302) to encourage active living. Zoning changes that allow for smart growth development in terms of diversity in land use, transportation, building types, and mixed use functions are easily marketable and financially competitive (Environmental Protection Agency [EPA], 2012). Clark (2007) suggested *incentive zoning* as land use regulations to eliminate sprawl, enhance community benefits, and promote environmentalism.

Market and Land Value

Finance and investment. Although the theoretical and professional study of the built environment on health is in its infancy, there is growing evidence to indicate that healthful urban planning is key to policy changes (Kent & Thompson, 2012). However, the study of the built environment costs and benefits for health improvements is needed.

Local and regional government can presumably benefit by preserving green spaces to facilitate physical activity and private developers benefit due to reduced building costs and maintenance in more compact communities, and lower land costs (Ewing et al., 2014). How financing impacts these benefits is an area lacking in research (Shoup & Ewing, 2010). “Benefit research” (Kirby & Hollander, 2004, p. 21) is also lacking for the real estate developer.

Real estate has been “commodified” and extremely specialized to access financing and reduce investment risk (Leinberger, 2005, p. 15). Real estate finance continues to be product-driven, that is, based upon standardized, single use real estate, i.e. residential housing such as single family homes in developments, commercial buildings in strip malls, or commercial buildings for offices. The value of these products can be easily calculated using traditional models of return on investment, such as discounted cash flow (DCF), net present value (NPV), capitation rate (Cap rate), and internal rate of return (IRR). This short term financial approach, combined with minimal construction quality to insure quick build and profit without a life cycle plan for the development, perpetuates the issues with conventional development, development unrelated to the built environment, and urban sprawl (Leinberger, 2001; Russell, 2011). Further, since New Urbanism/complete communities/smart growth is, despite decades of discussion, still in its infancy, there is little historical long term financial information on successful projects, thereby perpetuating the difficulty obtaining financing and requiring higher costs for capital (Leinberger, 2001).

Financing tools for mixed-use development fall into six categories: (a) Bedrock tools, e. g. tax exempt bonds, (b) Targeted tools, e. g. assessment districts, (c) Investment tools, for example, tax credits, TIF, NMTC, (d) Access to capital lending tools, e. g. revolving loan fund, (e) Support tools, e. g. grants, and (f) Developer financing/privatization tools, e. g. debt and equity. (Rittner, 2013). But complete communities and healthy communities incorporate mixed use, open space, multilevel structures, walkable/bikeable streets, and commercial entities all in one large project, a concept without a standard formula for return on investment (ROI) for current investment tools that are inflexible and inadequate. Investors and bankers do not know how to evaluate financial projects on these types of projects, and have been immersed with the 19 standard project types (Leinberger, 2005) (see Table 2, Appendix D) that are easily traded in large quantities nationally and internationally (Leinberger, 2008).

These “nonconforming” (Leinberger, 2008, p. 50) complete/healthy community projects are usually funded by smaller local and private investing firms. Further, one prominent real estate investment banker, Bob Larson, stated that the “investment community will not allow national companies to do that yet” (Leinberger, 2008, p. 159). Political and financial leaders may not see the societal advantages of a walkable urban environment; it is social entrepreneurs leading the charge.

Table 2
The Nineteen Standard Real Estate Types

| Income products | | |
|---|-----------------------------|------------------------|
| Office | Industrial | Retail |
| Built to suit office | Multi-tenant bulk warehouse | Grocery anchored |
| Mixed use urban | Build-to-suit industrial | neighborhood centers |
| office/retail/ restaurants | | Big box anchored Power |
| Medical office | | center |
| Multitenant office | Miscellaneous | Lifestyle center |
| Rental apartments | | Hotel |
| Garden apartments | Self-storage | Budget motel |
| Urban apartments | Mobile home park | |
| Entry level | Move-up housing | Luxury housing |
| Retirement | Resort/second home | Hotel |
| Includes a variety of segments, e.g. assisted living, independent, etc. | | |

Note. From *The Option of Urbanism: Investing in a New American Dream* (p. 51) by C. B. Leinberger, 2008, Washington DC: Island Press. Copyright 2008 by Island Press. Reprinted with permission.

Investors need to have not only a market, but a sizable one to make their projected rate of return in relationship to risk, ideally high potential with limited risk (Merk, Saussier, Staropoli, Slack, & Kim, 2012). New Urbanism's mixed use development financing is complex and perceived risky (Arrington, Faulkner, Smith-Heimer, Golem, & Mayer, 2002; Duany et al., 2000), thereby forcing these developers to generate quick cash flow. Gyourko and Rybczynski (2000) surveyed 23 developers, financiers, and investors from around the United States, and although it was a small sample size (23), the

survey participants identified public demand for smart growth communities that have a “social benefit” (p. 737) as a driver to reduce risk, thus minimizing challenges with traditional funders. Further, Gyourko and Rybczynski (2000) recommended several strategies that could circumvent current lending procedures in the face of risk: (a) use the discounted cash flow methodology, (b) create relationships with nontraditional capital markets, i.e. pension funds and endowments, that will have lower ROI requirements, (c) have developers phase their projects such that there is one aspect of it that will generate cash flow quickly, (d) have a neutral institution, such as the Urban Land Institute, to devise a standardized mixed-use product type that could be used as a basis for a pro forma, (e) increase the product offering types to lower the average value, and (f) obtain historical data of New Urbanism projects and track what aspect of these projects are making money.

Additionally, developers who support TOD or New Urbanism get no special consideration from traditional lenders in securing a loan—no reduced interest rates or points or no improved loan-to-value ratios (LTV). Loans are based on traditional project size and type and the lender’s credit rating, not related to the large scale development of TODs, their benefits, nor the supply and demand for them (Murphy & Falk, 2012). Appraisals to obtain comparable market analysis (CMA or comps) are difficult because there is generally no value added to properties in proximity to transit (Cervero, 2004). Lending is tied to conventional debt financing, market demand, and value, with the lender using a template based on a suburbia neighborhood development and sprawl instead of a

template based on urban planning developments, such as TODs and TNDs, i.e. mixed-use, TOD (Cervero, 2004; Leinberger, 2001). Moreover, when lenders and investors provide financing, they tend to separate and evaluate each property type individually, and then use a weighted average of these individual property types (Gyourko & Rybczynski, 2000) because there is currently not a standard formula for complete communities.

Moreover, as identified earlier, there is not standardized methodology or metrics for evaluating TODs or a shared list of investment risk factors (Cervero, 2004). TOD projects take longer to see the financial value but investors want relatively short payoff periods (Gyourko & Rybczynski, 2000). Perhaps a measurement of population health standards can be utilized for ROI on complete communities rather than just short-term gains and returns; Leinberger (2007) called this ‘patient equity’ ” that seeks an alternative approach from standard underwriting processes to those of goals of New Urbanism/complete communities (i.e. gains far beyond a financial return, but one in population health). Walkable urban development, sprawl repair, and retrofitting are more costly, provide better built projects, and generally have a full development window of seven to 20 years or longer. Conversely, current real estate investment returns are just three to five years, requiring no patience (Cowan, 2013; Leinberger, 2008).

Durand et al. (2011) reviewed 204 articles that evaluated the association of the ten smart growth factors with physical activity or body mass. Only 25 percent of those studies had up to three principles, and no studies contained seven or more out of the ten principles. In fact, one of the principles not studied is “Make Development Decisions

Predictable, Fair and Cost Effective” (National Center for Appropriate Technology, n.d., para. 1). This was also the same principle that was least likely to be implemented in a study sponsored by the EPA that examined how smart growth changes can improve the health of an aging population and support aging in place (Sykes & Robinson, 2014). This principle, that emphasizes cooperation and transparency to further economic growth and attractiveness to investors and developers (McConville, 2013) and determine metrics to assess cost effectiveness is related to the focus of this study.

Further research on the financial gains of mid to long term real estate investors is needed (Leinberger, 2001). Those stakeholders who engaged in projects through the Partnership for Sustainable Communities stated a community’s need for sources of data and tools for analysis (US Environmental Protection Agency, 2014). Even those cities that have received millions of dollars for a variety of renovation projects through the New Markets Tax Credits (NMTC) do not have a system or metric in place that measures the effectiveness of these programs (Hardin & Noland, 2011). Erickson and Andrews (2011) posited that the health care sector already has in place tools that measure and document outcomes. These tools could be incorporated to include health outcomes in community development. Likewise, Talen (2013) interviewed 34 US affordable housing developers to determine the barriers with funding walkable, mixed income communities. Besides better access to funding, the necessity of financing regulation reform and zoning, and incentives, Talen (2013) identified the need for additional research that identifies the benefits of walkable, mixed income communities.

In 2009, the Partnership for Sustainable Communities was formed with the US Department of Housing and Urban Development (HUD), the US Department of Transportation (DOT) and the US Environmental Protection Agency (EPA). One of the partnership's goals is to effectively coordinate policies and resources to support areas that have a variety of transportation options and affordable housing (US Environmental Protection Agency, 2014). In May, 2010, then Secretary Shaun Donovan acknowledged that the current paradigm of lending decisions is flawed and vowed to spend "\$10 million to create metrics calculating the 'true combined cost of housing and transportation in a way that underwriters could lend to'" (Mader, 2010, para. 11) to obtain hard figures to define what the "holistic qualities of New Urbanism are worth" (Lindsay, 2010, para. 10).

Thus, unless a developer can improve market value in the project, private financing is difficult for these high quality projects. As a result, private-public partnerships are crucial to leverage financing for affordable housing and development (Peterson, 2014). Tax increment financing (TIF) is one method of an economic development tool that leverages private and public financial strengths (Peterson, 2014). After municipalities designate an area for revitalization, TOD, TND, and/or brownfield remediation, property tax revenue for that area is earmarked and assessed values increased for future development for infrastructure or other initiatives in those targeted areas (Dye & Merriman, 2006). Although states differ in their procedures and conditions, capital investments are funded through borrowing or issuing bonds that are paid back through TIF funds (Merk et al., 2012). Unfortunately, TIF has been wasted on projects

that do not attain public goals, cater to special interest developers, or develop in areas where it is least needed (Kerth & Baxandall, 2011).

Another strategy suggested by Belzer (2014) to encourage smart growth is for developers to partner with municipalities using public investment funding. This has been done through Community Benefits Agreements (CBA) that clearly define expectations for the community and incentivizing those goals. The Public Private Partnerships (P3) is a growing trend in development financing that is gaining significant traction for investments in sustainable infrastructure (Rittner, 2013). As stated earlier, there is no financial model nor is there knowledge based on historical data for developers to make financial decisions for TNDs, but one is needed (Kirby & Hollander, 2004). Smart growth environments, such as transit-oriented or traditional neighborhood development, could have a significant impact on reducing the health care costs of chronic diseases, especially obesity, and addressing health disparities (Church, 2013). Creating new financing techniques or innovative funding models must be acknowledged in creating complete communities and smart growth. Erickson and Andrews (2011) suggest financial incentives that reward health and wellness investments.

If changes in the built environment to facilitate health promotion were seen as a social program, an alternate way to fund these programs is with private investment. First piloted in Britain and then in Australia, Pay for Success (PFS) is a social impact bond (Von Glahn & Whistler, 2011) that combines funding, program evaluation and management, and financial incentives if goal targets are met. This model is attractive to

state and local governments because it overcomes major cuts in health and human service programs, supports innovation and new initiatives, reduces government spending and risk, improves transparency, and moves state and local governments into prevention that benefits the recipients of the programs. Additionally, the investor wins by earning a profit and improving society (Bireg, 2013). In 2012, the US Federal Budget allocated \$100 million to pay for programs for recidivism, early childhood special education intervention, summer academic programs for challenged students, elder care services, and youth disabilities transition services (Office of Management and Budget; n.d.). For fiscal year 2014, nearly \$500 million was allocated (Office of Management and Budget, 2013). To date, there have been four PFS initiatives in the United States but unrelated to health programs (Galloway, 2014). Rinzler, Tegeler, Cunningham, and Pollack (2015) suggested that PFS is a worthwhile financial strategy for housing mobility and reduction of medical costs of obesity and diabetes.

Many municipalities impose a one-time 'development charge' to finance infrastructure needed for new on-site development or in a subdivision, along with off-site costs for access roads, water, and sewage services. Some municipalities expand these charges to include other services such as libraries, schools, and recreational facilities (Merk et al., 2012). Slack and Bird (as cited in Merk et al., 2012) surmised that the ultimate payer of this development charge, be it the developer or new homeowner, is based on the supply and demand for the new development. In 1995, the National Neighborhood Indicators Partnership (NNIP) formed a partnership with the Urban Land

Institute and local partners in 36 cities to develop and use a database of neighborhood level information collected by city and community leaders, vice independent research reports (National Neighborhood Indicators Partnership, 2014). Financial data, historically difficult to capture, integrated with the NNIP could provide quantitative data on the impacts of development, prevention strategies, outcomes, and their cost effectiveness (Cytron, 2012; Erickson et al., 2012).

Funding could also be evaluated for social value worth. Social impact assessment methods are broken into three basic categories— process, impact, and monetization (Clark, Rosenzweig, Long, & Olsen, 2004). Perhaps a condition in order to get funding for projects is a collaborative effort among stakeholders that includes smart growth practices and a health component metric. One stakeholder may invest, for example developers, but another stakeholder benefits, such as the health care system (Arkin, Braveman, Egerter, & Williams, 2014).

Consumer Preferences

Comprehensive plans and health impact assessments (HIAs). A comprehensive plan establishes a long range (20 to 30 year) needs assessment, policy decisions, and forecasts that consider the dependencies and interrelationships of a community's agencies. It is usually updated every 10 to 15 years, and considers the existing social, economic, and environmental goals and objectives for the community's current and future needs (Hodgson, 2011). Although not all local governments are required to develop a comprehensive plan, some local governments are recognizing the

public health benefits of a holistic comprehensive plan, inclusive of sustainability.

Comprehensive plans consider land use, transportation, parks and open spaces, water resources, economic development, urbanization and redevelopment areas (Schively, Forsyth, Krizek, Baum, Johnson, & Pennucci , 2007), population and resources, youth and education, and health and community (Phillips, 2003).

Further, many local communities have stand-alone Health Impact Assessments or health elements aside from a comprehensive plan (Hodgson, 2011; Ricklin & Kushner, 2011). HIAs facilitate planning for health issues into the collaborative planning process. HIAs focus on those human health areas in which planners are not traditionally involved, such as tobacco sales and HIV/AIDs counselling (Forsyth, Schively, Slotterback, & Krizek, 2010). Although a relatively new tool, HIAs have traditionally focused on health facilities and social programs, but are now expanding into urban design to consider the key determinants of physical and mental health.

Additionally, land use and population health are inextricably tied to health outcomes; therefore, an HIA can be used by community stakeholders and decision makers to facilitate and establish short and long term planning goals and address community needs. Based on the elements of an HIA, the San Francisco Department of Public Health developed a Healthy Development Measurement Tool to evaluate health indicators related to access to public transportation, health care, and healthy foods. Researchers have demonstrated that this tool is able to be modified and customized for different communities seeking to design the built environment to meet their health goals

(Denver Housing Authority, 2010; Farhang, Bhatia, Scully, Corburn, Gaydos, & Malekafzali, 2008; Wernham, 2014).

Impact of healthy communities on society. New Urbanism is built upon the idea that many Americans are tired of conventional suburban development and are willing to pay for an alternative. Market research indicates that between 30 and 50 percent of targeted populations want to live in “mixed-use, walkable places” (Leinberger, 2005, p. 28), but the detached housing supply is 62% of the market (LaRue and Healy, 2016). Although acknowledging a monumental shift is needed from the way the built environment is currently developed and supported, Leinberger (2008) proposed five steps to achieve the next American Dream, one of which is to present to the financial community the unique opportunities inherent with TND and a sustained long-term built environment.

In a 2010 random sample survey of members of the National Association of Realtors and the National Association of Home Builders (NAHB) assessed current and future trends of TNDs. While realtors believed homebuyers were focused on affordability, safety, and school district, homebuyers were increasingly demanding energy efficiency and walkable communities. Although real estate developers realize the significant market value and profitability to building walkable communities, greater density, and mixed use developments, especially in inter-suburban areas (Levine & Inam 2004; Smith-Heimer and Golem 2001 as cited in Kirby and Hollander 2004; TRB, 2014), they are reluctant to build TNDs. Many home builders still perceive low demand, and are

hampered by government and policies (Carnoske et al., 2010; Grant & Gonzalez, 2012). Developers generally do not understand that a community that promotes physical activity is now what the market desires (Lopez, 2012). Similar findings were reported in earlier studies synthesized by Kirby and Hollander (2004).

However, a later survey conducted by the National Association of Realtors (2013) found that the majority of participants surveyed prefer to live in communities with smart growth principles. Approximately one third of Americans surveyed indicated they are weary of suburbia and are willing to pay for New Urbanism as an alternative (Frank, Engelke, & Schmidt, 2003; Leinberger, 2008). However, the supply of TNDs was found to be inadequate in meeting the demands, thus putting a price premium on these properties (Leinberger & Alfonzo, 2012). Similarly, when compiling the interviews and survey responses of over 1,000 real estate leaders and industry experts for their 2014 report, Warren, Kramer, Blank, and Shari (2013) identified the Generation Y's preference for multifamily housing, urban mixed-use properties, and town center development. Similarly, Baby Boomers were downsizing from houses to apartments, from the suburbs to urban communities in proximity to health care facilities.

When Shoup and Ewing (2010) reviewed and synthesized 83 peer-reviewed and independent reports related to economic benefits of walkable community design strategies, they found that parks and recreation areas as well as the surrounding areas were prone to result in higher property tax revenues, increased economic benefits to nearby homeowners as a result of higher home values, and higher home sales prices with

greater marketability to real estate developers. Sohn, Moudon, and Lee (2012) measured economic value of neighborhood walkability of single family, rental, and multi-family residential, and commercial/retail land use. Sohn et al.'s findings supported previous studies that high density neighborhoods are desirable and more valuable than low density neighborhoods. The Robert Wood Johnson Foundation (2011) had similar findings: Not only does TND reduce the risk of chronic illnesses, their research has shown that TND leads to higher property values and home sale prices, and attracts new home buyers. According to Robert Wood Johnson Foundation's research, when healthy food was made available in these TNDs, it created new job markets, businesses, and greater opportunities for farmers.

Mapes and Wolch (2011) posited that smart growth developments are defined differently between developers, environmentalists, and local governments, thereby often creating compromises of sustainability and New Urbanism and uniform performance indicators. Conscientious developers have a dilemma: to allow sprawl to continue, or to orchestrate new designs for health, community, and sustainability (Duany et al., 2000). Most developers build what they believe the market demands: status quo with suburbia, sprawl, and car-dependence. The unforeseen consequences of this unchecked development is more automobile driving, less physical activity, hence more chronic illness such as obesity, diabetes, and heart disease. Public health workers and urban planners advocate counteraction of sprawl with smart growth components of high

population density with low automobile traffic, mixed use development, green spaces, alternative transit, and walkable/bikeable safe neighborhoods (Resnick, 2012).

Many towns and cities have now adopted smart growth principles in their planning and development intended for positive health, ecological, and economic outcomes (Jackson & Kochtitzky, 2002). This research may identify why some towns and cities have moved in the direction of smart growth, either through local, state policy, or market demand, while others have not. Another approach that may further encourage demand for smart growth development and reduce the growth of sprawl would be to minimize the mortgage interest deduction (MID) for large homes on large lots, i.e. sprawl, and incentivize those buyers purchasing in greater density areas or those that are being revitalized (Tachieva, 2011).

Health and the built environment. Although a large pool of research indicates a relationship between health and the built environment, obesity and chronic disease correlations are only one specific focus of the negative impact of the built environment (Collins Perdue et al., 2003). For example, Booth et al. (2005) evaluated nine papers assessing the relationships between the built environment and obesity, and found evidence to support policy development to combat obesity in lower SES neighborhoods that usually lack recreational areas, health food access, and safety for walkability. Hodgson (2012) expanded the discussion specifically on the food system and its connection to the built environment that requires policy and regulator action to address health and sustainability. Further, Erickson and Andrews (2011) also identified better

access to healthy food to improve healthy behaviors in the environment. Erickson and Andrews (2011) proposed an evidence based metric system that could provide the data to establish financial incentives for investments supporting health promotion. Likewise, the Institute of Medicine has identified safety concerns with walking and biking, a lack of healthy affordable food outlets, and continuous marketing of unhealthy food and beverages as some contributing factors to obesity (Glickman et al., 2012).

Previous studies on individuals and communities have concluded that there is an inverse relationship between socioeconomic status and obesity. Vandergrift and Yoked (2004) noted obesity rates increased to a greater degree in areas with sprawl. They noted that sprawl created a reliance on cars for work, school, and play that decreased physical activity leading to a more sedentary lifestyle, thus attributing to higher obesity levels. However, of the 63 research papers reviewed by Feng et al. (2010), there was no scientifically founded evidence that there was a strong relationship between the built environment and obesity, except in consideration of the county sprawl index and land use mix, and that a consistent, standardized study design and methodology be used to provide evidential relationships.

Because of varying research, Ding and Gebel (2012) analyzed 36 articles comparing the built environment's role on physical activity and obesity but with an emphasis on study quality and identification of future research. Ding and Gebel acknowledged the relevance of the social ecological framework within the context of built environment and physical activity and suggested future research consider the

complexity of moderators and mediators via a simple correlation and for more vigorous research methods and operationalization of measurements., More recently, Marshall et al. (2014) found that more compact streets correlated with decreases in obesity, diabetes, high blood pressure, and heart disease, and have better health outcomes in general.

Interestingly, not all consumers are in favor of walking, biking, and transit-friendly communities. Survey participants in Logan, Frank, Noelle, Leersen, and Engelke's research (2004) perceived that higher densities or mixed-use developments negatively affect property value. However, in Brooks, Ohland, Thorne-Lyman, and Wampler's (2012) survey, those residents who initially opposed the trends toward new urban communities, Nimbys (Not In My Back Yard), are now becoming Yimbys (Yes In My Back Yard) because they see the economic benefits to development and density. In fact, there are consumers willing to pay a premium to live in TNDs, such as the Kentlands in Gaithersburg, Maryland, because of access to physical activity opportunities just outside their home that is appealing to real estate developers (Kirby & Hollander, 2004).

Health outcomes. Although smart growth principles are being utilized more extensively, a direct correlation between smart growth and health outcomes has not been empirically linked. One reason this may be is that the immediate or short term study length health benefits are difficult to measure or quantify (Sykes & Robinson, 2014). In addition to the longevity of research required to measure health outcomes, Adler (2012) stressed the methodology (the when and how), the necessity of common indicators, and a

database for storage of information is significant to measure health in a population in relationship to the impact of a built environment project. Ultimately, disease specific biomarkers are an objective and quantifiable way to identify population health improvements after prevention interventions. But for the present time, self-reported surveys on health and disease continue to be used.

In the effort to improve lifestyles to create healthy choices that will improve public health, behavior alone is not sufficient. A restructuring of home and work settings and the built environment for all socioeconomic, racial, and geographical considerations is essential (Story, Kaphingst, Robinson-O'Brien, & Glanz, 2008). Grzywacz and Fuqua (2000) described “four leverage points for health [and the] possible links between environmental or situational contexts and individual outcomes” (p. 103). These leverage points include socioeconomic status, the family, employment/work, and school. Further, Grywacz and Ruqua (2000) contended the social ecological approach provides a “nonreductionist” view of health to facilitate more effective health intervention and research (p. 109). Changes to the built environment using smart growth principles that eliminate obesogenic environments, such as physical activity opportunities, safety, and availability of better food choices, could affect entire communities, not just individuals. These changes to the built environment make healthy choices the easy choice (Bell & Rubin, 2007; Lavizzo-Mourey, 2012; National Prevention Council, 2011).

Physical activity. While there is research that suggests that a healthy built environment increases physical activity (Collins Perdue et al., 2003), literature is sparse

that measures a healthy built environment with health outcomes. Sarkar, Gallacher, and Webster (2013) hypothesized that the built environment affected BMI in older men using a three-level mixed effects linear regression and found that there was a significant decrease in BMI in those individuals living in areas that support physical activity. Kramer, Lassar, Federman, and Hammerschmidt (2014) studied 13 wellness intended building projects; three of the projects are being further studied to determine the impact on residents' and workers' health and two previously completed studies found that residents in one of the projects increased their physical activity by 40 to 50 minutes each week. Zhu, Yu, Lee, Lu, and Mann (2014) conducted a case study of one of these projects, Mueller, in Austin, Texas, and concluded that there was a significant increase in physical activity, social interaction and cohesion.

Additionally, land use and transportation policies have been identified as partial culprits responsible for the rise in obesity (American Planning Association, 2007). Sallis' et al. (2006) literature review strongly correlated environmental factors' influence on physical activity for recreation and transport; however, the study concluded that prospective studies are needed to strengthen causality before policy, theory, and design recommendations can be made. The Committee on Physical Activity, Health, Transportation and Land Use (Transportation Research Board, 2005) evaluated 22 studies on urban planning and travel behavior and 28 studies on public health and physical activity. Upon completion of this TRB analysis, it was found that in new-urbanist developments, that is one with greater population density, "employment, stores, mix of

land uses” and positive neighborhood characteristics and design, “the greater the number of walking and other non-motorized trips (TRB, 2005, p. 154). But, there was no correlation that the “built environment caused physical activity” (TRB, 2005, p. 167) because the study found that individuals that chose to live in walkable, bikeable communities preferred to be more physically active. More in depth is Handy’s (2005) analysis of these studies that concluded there is an “association between the built environment and physical activity” (p. 30) but what specifically those built environment characteristics are need further study.

Although the “environment, the built environment, public policy, and an individual’s health status” may affect physical activity, Yang et al. (2012) narrowed their study to the “real-world relationships between activity and the built environment at the individual and community level” (p. 1) using multiple data systems and GIS spatial analysis. While research suggests access, safety, and security as promoters of outdoor physical activity, it does not account for a person’s physical activity level or frequency or individual’s level of fitness (TRB, 2005). Veenstra, Luginnah, Wakefield, Birch, Eyles, & Elliott’s (2005) quantitative study used association and logistical regression modeling that explored the relationship of community association involvement and health as measured by self-rated health status, level of emotional distress, number of chronic health conditions, and body mass index score. After controlling for gender, age, and residential area, they found that more involvement with community associations corresponded with lower chance of being overweight, regardless of other predictors present.

Hence, there appears to be a gap in the research to determine the degree of correlation between the built environment and physical activity level characteristics, such as location, population, socioeconomic status, and these effects on population health, and the relationships of the cost benefit of investment to changes to the built environment that would facilitate increased physical activity (Transportation Research Board, 2014). Partly due to the lack of standardized metrics and methodology for reporting, the relationship of the built environment in the example of healthy communities to health outcomes remains unknown.

The Guide to Community Preventive Services: Sociocultural Environment Logic Framework (Institute of Medicine [IOM], 2002, p. 251; see Figure 5, Appendix E) depicts a framework that uses a social ecological model for preventive services. Many of these determinants and health outcomes have been discussed in this study. However, this study further examines the particular pathway highlighted in red and blue, and incorporates the additional variables into the IOM diagram that will be used in this proposal. The enhanced depiction, as indicated by the blue call out in the diagram, will be presented in Chapter 3, Figure 6.

Summary and Conclusions

In 2013, the United States spent 16.4% of the Gross Domestic Product (GDP) on healthcare, compared with an OECD average of 8.9% (Organisation for Economic Co-operation and Development, 2015). Further, the United States ranks 33rd for infant mortality and 28th for life expectancy among developed countries (Murray, Phil, &

Frenk, 2010; Rosen, Maddox, & Ray, 2013; OEDC, 2015). Yet, despite health promotion initiatives, insurance incentives, employee wellness centers, pharmaceuticals, and drastic surgery, the United States ranks last of 11 high income countries for health outcomes (Davis et al., 2014). These poor outcomes can be viewed through the social ecological framework, and attributed to a multitude of health determinants, such as age, gender, race and ethnicity, culture, social status, education level, genes, socioeconomic status, health behaviors, social environment, access to medical care, the health care industry itself, policy, and the physical or built environment. This study addressed one health determinant: the built environment. Where one lives, works, studies, and plays matters in obtaining positive health outcomes. Making the healthy choice the easy choice may significantly impact the increasing rate of lifestyle diseases in the United States (Centers for Disease Control and Prevention, 2013). *Complete communities, healthy communities, TOD, TND*, or communities that are built using *Smart Growth* principles provide the opportunity for people to be in a surrounding that supports health and makes health the easy choice.

The development of these well-designed, multi-modal, and mixed-use town centers has been hampered by the absence or presence of a comprehensive plan, current antiquated funding mechanisms and policies, outdated zoning laws, local and federal policies and statutes, and transportation financing and policies. Further, there are no standardized metrics or methodology to measure the profitability of these healthy communities, nor are there long term studies on the precise mix of development for these

communities, or a well-established direct correlation or causal link made empirically between smart growth, the built environment, and improved health outcomes.

Real estate has been commodified and extremely specialized to access financing and reduce investment risk (Leinberger, 2001, 2005). Real estate finance continues to be product-driven, that is, based upon 19 standard project types. However, complete communities incorporate mixed use, open space, multilevel structures, walkable and bikeable streets, and commercial entities all in one large project, a concept without a standard formula for return on investment (ROI) for current investment tools that are inflexible and inadequate. Investors and bankers do not know how to evaluate financial projects on these types of projects. Political and financial leaders may not see the societal or economic advantages of a walkable urban environment, hence entrepreneurial real estate developers must find a way to secure funding for these projects.

as location, population, socioeconomic status, and these effects on population health.

Lastly, there is a gap in determining the relationships of the cost benefit of investment to changes to the built environment that would create healthful behaviors. This study extended the knowledge in urban planning, real estate development, economics, and politics to identify barriers and promoters of policy affecting the built environment and health. The review and synthesis of the literature detailed in this chapter established the foundation for the research design rationale, and methodology discussed in Chapter 3.

Chapter 3: Research Method

The purpose of this quantitative multiple regression analysis was to use the urban planning theory to explore the degree to which comprehensive plans, finance, and zoning policies predict the likelihood that real estate developers will build certain types of communities in the United States. Additionally, I examined the extent that associations exist between the IVs and DV using urban planning theory. In this chapter, I provide an overview of this study's research design, rationale, research methodology, and threats to validity, and conclude with a brief summary of information presented throughout this chapter.

Research Design and Rationale

In this quantitative research, I sought to examine the relationship between the IVs of comprehensive plans, finance policies, and zoning policies, as they impact the DV of real estate developers' decisions of whether to build communities that promote healthy living.

Variables of Interest in This Study

Although a variety of factors may influence the development of healthy communities as described in Chapter 2, in this study, I focused on the IVs of comprehensive planning, finance policies, and zoning policies. A comprehensive plan assists decision makers and stakeholders in developing future policies regarding an area's built environment and considers the relationships between components that comprise a community (i.e., housing, transportation, land use, economic development, environmental

protection, and health [Hodgson, 2011; Schilling & Keys, 2003]). Antiquated financing policies affecting changes to the built environment also impact the social determinants of health (Gostin, Boufford, & Martinez, 2004). Lending is still tied to conventional debt financing, market demand, and value, with the lender using a template based on a suburbia neighborhood development and sprawl instead of a template based on urban planning developments, such as TODs and TNDs, that is mixed-use TOD (Cervero, 2004).

Lastly, zoning was considered while examining built environment's influence on health outcomes of those living in built environments (Rossen & Pollack, 2012). In many areas, zoning is categorized as single use, commercial, residential, or agricultural and forces people to drive to meet their destinations of daily living, such as shopping, work, school, and recreation because the destinations between these activities is too far to walk or bike (Fenton, 2012). An inextricable link exists among zoning, land use, and transportation. Land use and transportation policies have been identified as partial culprits responsible for the rise in poor health outcomes, namely obesity (American Planning Association, 2007). Because current transportation policies are automobile centric, by increased capacity and speeds and sprawl enabling, they do little to improve safety and active transport (SmartGrowthAmerica.com, 2015). The use of automobiles as the primary means of traveling decreases the possibility of people engaging in physical activity (Seskin & Murphy, 2014).

The DV in this study was real estate developers' choice of what type of communities to build in the United States. Hammond and Levine (2010) identified obesity's societal economic impact in direct medical and productivity costs, transportation costs, and human capital costs, thus stressing the need for policy changes and future research. In their review of 63 papers on built environment and obesity, Feng et al. (2009) concluded that more standardized metrics and longitudinal research needs to be developed to correlate the effects of the built environment on obesity.

Figure 6 depicts how the many variables relate to one another and within the contextual framework as shown earlier in the Institute of Medicine's Sociocultural Environment Logic Framework, Figure 5. Note that the additional blue areas are variables and topics of interest discussed throughout Chapter 2 that I have added to this figure.

Research Design and Time Restrictions

Multiple regression analysis was used to statistically model how the predictor IVs explained the variance in the DV (Lammers & Badia, 2011). Understanding correlational data between variables using a survey are well suited to regression analysis (Constantine, 2012). Ewing (2014) called regression analysis the "work horse" for the field of planning (p. 62). Although correlation does not mean causation, knowing how a comprehensive plan, finance, and zoning policies are interrelated and a most significant driver to each other and to health outcomes could offer insight into improved policy development for real estate developers wanting to develop healthy communities.

There were no time or resource constraints consistent with the design choice. Emails were sent to prospective participants, who were asked to complete the online survey within 15 days. Since a sufficient sample size was not reached, the study went on for 2 more weeks to maximize sample size.

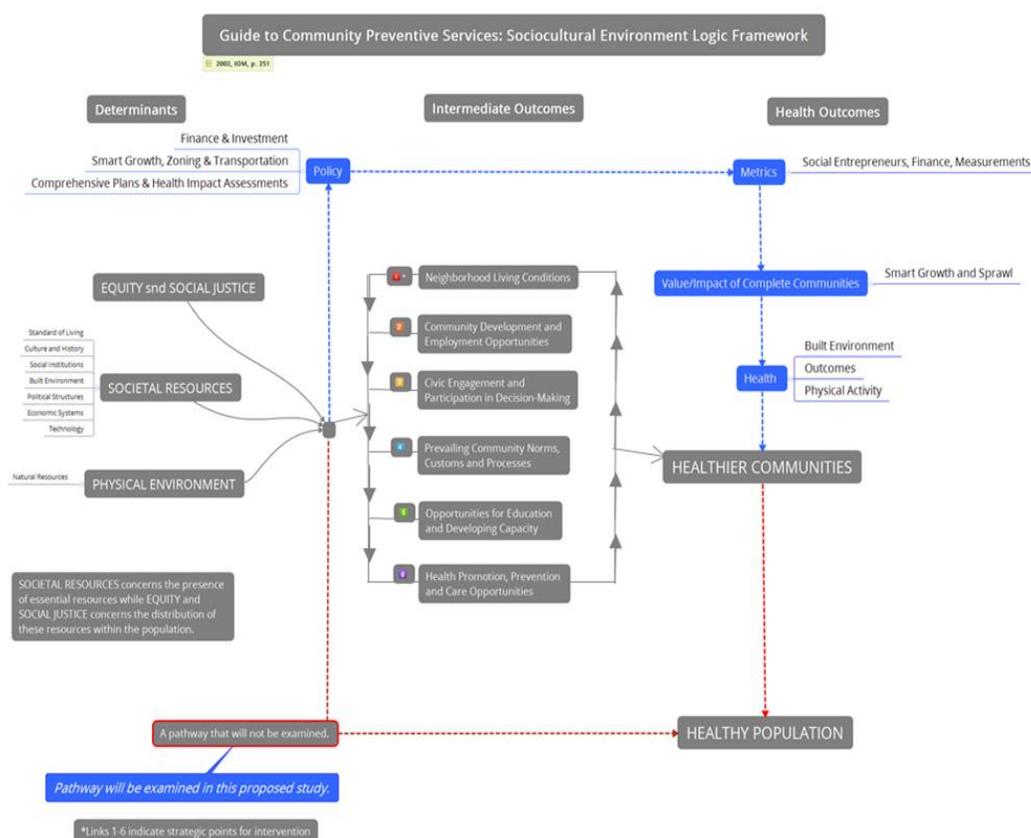


Figure 6. Logic framework edited to include IVs. Adapted from Guide to Community Preventive Services: Sociocultural Environment Logic Framework. Adapted from Speaking of Health: Assessing Health Communication Strategies for Diverse Populations (p, 251). By Institute of Medicine, 2002, Washington DC: The National Academies Press. Copyright 2002 by National Academy of Science. Adapted with permission.

Several previous researchers have identified the need for future causal research (Adler, 2012; Boarnet, 2003; Durand et al., 2011; Marshall et al., 2014; McCoy et al., 2010; Sallis et al., 2006) and less correlative research. Samimi, Mohammadian, and Madanizadeh (2009) however, recognized challenges with causality as a result of a lack of standardized data, assessment methods, and theoretical framework. Similarly, Mackenbach et al. (2014) used five electronic databases to review methodology in the literature published between 1995 and 2013 in four languages that addressed correlations between physical environment and obesity, suggesting that more emphasis was needed on causation versus correlation. Feng et al. (2009) evaluated 63 papers that correlated a variety of aspects of the built environment and obesity and recommended using a standard metric evaluation for correlations. The research of Yang et al. (2012) included individual and community level data to determine the associations among physical activity, individual characteristics, and the built environment. Yang et al. used multilevel mixed model logistic regression analysis to discover alignment with previous relationship studies and any new correlations. Lastly, although mortality rates and public health spending were the variables used to study a causal effect on population health, Mays and Smith (2011) used multivariate regression models to estimate public health spending on health outcomes while controlling for environmental factors that can influence population health. To be more specific, 12 studies were identified that researched New Urbanism/TOD/mixed use communities and associated real estate professionals and stakeholders for real estate developers (see Appendix F).

A similar study design to my study was derived from Carnoske et al. (2010) with the St. Louis Prevention Research Center's Study of Health in Families in Transition (SHIFT). In two phases, the researchers first surveyed developers to identify influencers and barriers in developing TNDs and secondarily measured residents before and after moving into TNDs for health outcomes. Although the before and after quasi-experimental study was not published due to a small sample size, the SHIFT study initially provided the backdrop for the survey tool and model for this study. The original SHIFT Survey can be found in Appendix G.

Lastly, Galloway, MacCleery, and Hammerschmidt (2014) surveyed 241 public and 202 private economic development and real estate professionals to determine what promotes and hinders real estate development. The ULI and Ernst and Young (EY) collaborated on the survey that compared responses of the public and private professionals with an interest in new urbanism development on infrastructure, economic development, finance strategies, and perceptions and priorities. Although five significant factors were discovered, the most important issue for all the surveyed real estate professionals was that the infrastructure that supports the built environment that was the main driver in determining what gets built and by whom (Galloway et al., 2014).

Because a large enough sample size was not reached with Carnoske et al.'s (2010) modified tool, the tool and data obtained from the ULI and EY were subsequently used for my study. After permissions were obtained from the authors (see Appendix H) to use the study and raw data from "Infrastructure 2014: Shaping the Competitive City"

(Galloway et al., 2014; see Appendix I), the study's survey developers and analysts (Beldon, 2014) provided the original survey questionnaire (see Appendix J) with the marginal typed in and the full cross tabs. The methodology for using this study as secondary data is described in this chapter and is noted as the Infrastructure 2014 study.

Methodology

Population

Used in the initial survey for the target population were individual real estate developers who have developed complete communities, healthy communities, and communities that have New Urbanism characteristics or age restricted adult communities. These individual real estate developers included adults (ages 18 to 90), and Question 7 of the survey details their main function in the company or organization. Complete communities are communities that integrate transportation, land use planning, and community design to make more efficient use of land, provide affordable housing, integrate commercial and residential uses, and facilitate a more social environment (Scott & Nau, 2012). Specific New Urbanism principles included walkability, connectivity, mixed-use and diversity, mixed housing, quality architecture and urban design, traditional neighborhood structure, increased density, smart transportation, sustainability, and quality of life (NewUrbanism.org, 2015). These real estate developers were identified by data from the website *The Town Paper* based on their published TND Design Rating Standards (Aurbach, 2005). The contact information of these specific developers to

invite them to participate in this study was obtained through internet searches. As of April 2016, there were 399 communities listed on *The Town Paper* (see Appendix K).

The comparison group was selected from real estate developers who have developed age-specific communities, also known as 55+ communities. The comparison group of real estate developers of 55+ communities has similar characteristics of a healthy community, that can be seen in Table 3 and made a good comparison group. Two distinctions between these groups are the origin of a standard definition: Healthy communities rely on nongovernmental, nonprofit, or for profit organizations whereas the age-restricted community definition has been standardized by HUD. Age restricted communities are now commonplace in the United States, and the developers of these 55+ communities have already experienced the barriers of development, that included consumer and regulatory acceptance (Marcus, Errico, Emmer, & Brooks, 2007), whereas New Urbanism and healthy communities are relatively young in their entry into the marketplace (Steuteville, 2016).

Table 3
Comparison of Healthy and Active Age Restricted Communities

| Characteristics | Healthy communities | Active age-restricted communities (55+) |
|--|--|---|
| Standard definition | Yes, CNU and others | Yes, US HUD |
| Include elements of a Complete Community | Yes | Yes |
| 1 st opened community | Early 1980s: Seaside, FL | 1954: Youngtown, AZ |
| Zoning | Compact, mixture of land uses, mixture of housing types, pedestrian oriented, and often a transit option | Compact, single family home, condo, apartment, modular home, RV or share a home with other single seniors |
| Density | High | High |
| Acceptability | Increasing, especially with baby boomers | High, especially with baby boomers |
| Amenities for physical activity | Walkable, bikeable, green space | Active: Walkable, bikeable, golf, swimming, exercise rooms, green space |
| Locations | US and worldwide | US and worldwide |
| Obtainable information | Yes, internet searches | Yes, internet searches |
| Regular/scheduled Social activities | Not standard in all | Yes, Clubs and special interests |

A list of the active age-restricted community developers was compiled using www.TopRetirements.com. This website was founded in 2007 by John F. Brady, a retired executive vice president of Business & Legal Reports, Inc., a business compliance consulting firm. I selected this website over other retirement living websites because the profiles and facts about the communities were objective and included communities in all 50 states. There is also a comprehensive database that the website user can access to find

specific desired options (TopRetirements.com, 2016). The database filters for the search that I used for this group were all 50 states, 55+ or age restricted, and all amenities. Similar to the test population, a download provided a list of these communities (see Appendix L), and the developers' contact information for these specific communities was obtained through Internet searches.

I ultimately used the Infrastructure 2014 study data. Galloway et al. (2014) used a nonprobability sample that was obtained from a list of ULI members, their contacts and connections, and popular development leaders. This population was a subset of all the real estate developers in the United States that had an interest in or specialized in new urbanism development. Figure 7 depicts the sample frame.

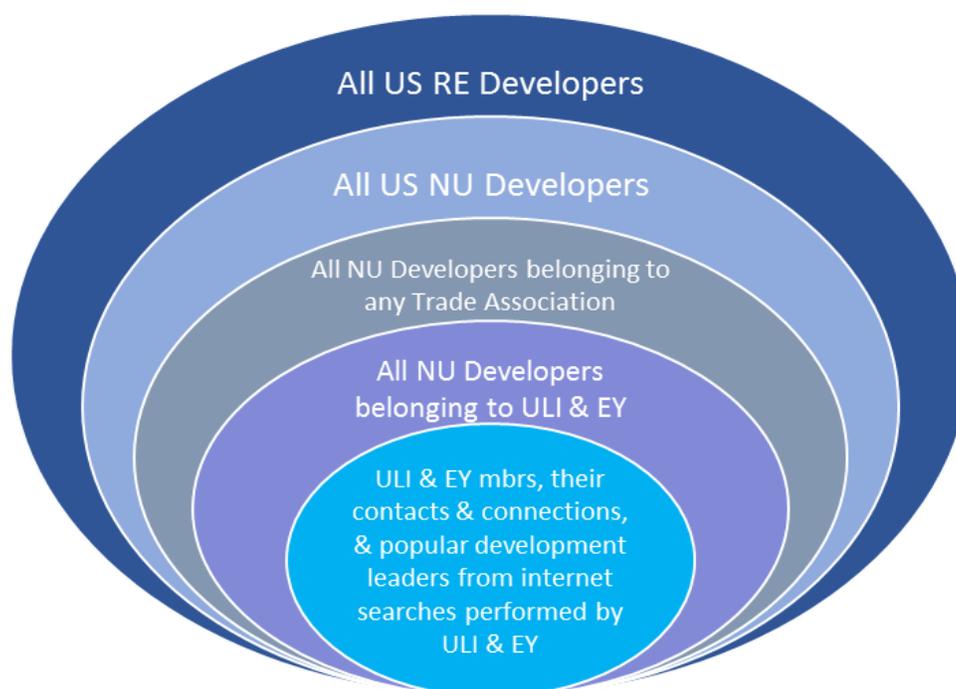


Figure 7. Sample frame.

Sample and Sampling Procedures

Purposive sampling using maximum variation sampling was used as the nonprobability sampling method because the both the study population and the comparison population were inaccessible populations, although both populations had a definition. There are a variety of organizations that defined attributes of complete and healthy communities, such as CNU, LOCUS, Smart Growth America, NeighborWorks America, the Sustainable Cities Institute, the APA, the Oram Foundation for the Environment & Urban Life, the Center for Transit-Oriented Development, the New Town Builders Association, the New Urban Guild, and Reconnecting American. Although these organizations defined healthy communities, none of these organizations provided a comprehensive list of healthy communities in the United States. The website The Town Paper provided both a definition and a comprehensive list of healthy communities in the United States.

Based on the TND named the Kentlands in Maryland, The Town Paper website was founded in 1996 by one of its residents at the time, Diane Dorney (The Town Paper, n.d.). To be listed on this TND website, a community must meet the TND Design Rating Standards that consider the size of the development, housing type, mixed-use capabilities, connectivity, proximity to public transportation and town center services, its streetscape and civic space, its architectural aesthetics, and its regional location (Aurbach, 2005). These standards were adopted in the 2006 EPA compilation of the Smart Growth scorecards.

This list as of January 2016, included 408 communities in 40 states; the real estate developers that were to be contacted were taken from this community listing. Their contact information was obtained using internet searches, and they were formally contacted via email. If they agreed to participate in the survey, the participants were asked to complete an informed consent form online. If this form was signed positively, then the participants used a hyperlink that took them directly into the survey online through a hyperlink provided. SurveyMonkey.com was the survey tool used for this study. Appendix M contains the details of this survey. The same process and procedure was followed for the comparison group of real estate developers (see Appendix N). The sampling details of the Infrastructure 2014 study were unavailable (see Appendix I).

External validity was considered in the sampling process. It was important in this study in order to generalize the conclusions across populations of real estate developers in the United States to developers in other countries experiencing similar concerns about real estate development and planning. The threats to external validity that were seen in this study was how well the study populations were representative of all real estate developers. The populations may have not been perfect representations, the samples were not similar (e.g., one community being much larger than another), have had selection bias with only using one source list, or have had extraneous and confounding variables, such as those resulting from the nonprobability sampling (Laerd, 2012).

Although this research was not performed to determine a cause and effect relationship, internal validity was important nonetheless. One threat to internal validity

was historical effects that could have changed the study's condition and affect the way the participants answered. In particular, the economic downturn in 2008, that resulted in a decrease in new housing construction, could have had an impact on developers' survey answers. Similarly, the timing that the survey was administered and the magnitude and critical significance of the effect of the events prior to the survey, i.e. the great recession, could have impacted survey results. The real estate market crash in 2008 presented a confounding variable that could have affected developers that started building healthy communities but did not finish building them, and therefore may have an effect on how they answered the survey questions, thus changing the results of the study.

A power analysis was needed to determine sample size to achieve statistical significance in this study. In social sciences the standard set values for the alpha level is .05, the power level is .80, and the effect size is .50 (Creswell, 2009; Trochim, 2006; Zint, n.d.). Other than the power level of .95, an alpha level of .05 and an effect size of .5 is consistent with Sarkar et al. (2013), Jongeneel-Grimen, Droomers, van Oers, Stronks, and Kunst (2014), and Berrigan, Tatalovich, Pickle, Ewing, and Ballard-Barbash (2014). Of the 12 studies that evaluated New Urbanism/TOD/mixed use communities and associated real estate professionals and stakeholders for real estate developers (see Appendix F), there were none that specified their alpha level, power level, or effect size that the researchers used for their studies. Therefore, I chose the alpha level as 0.05 and power level as 0.95, because these values were the most common values used throughout the research in my literature review. Coe (2002) and Chinn (2000) recommended odds

ratio as an alternate to effect size when the outcome is dichotomous, thus my calculated odds ratio will be 2.33. These values were entered into G*Power, that was created by the Institute for Experimental Psychology in Dusseldorf, Germany to compute power analysis for many different tests (Buchner, 2016). G*Power offered a wide variety of calculations along with graphics and protocol statement outputs. G*Power calculated sample size as 104.

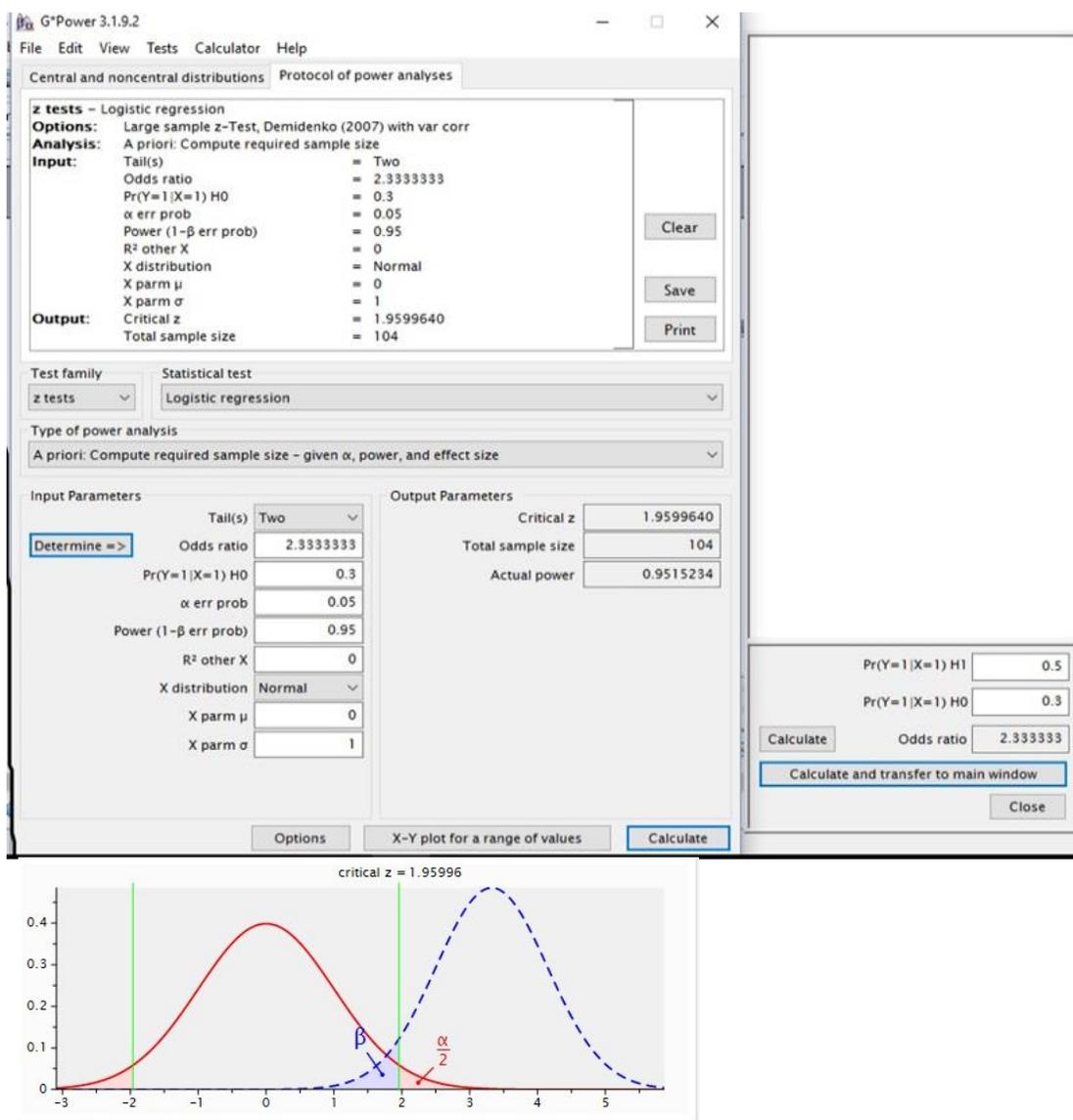


Figure 8. Calculation of sample size using G*Power.

Another online free statistics calculator calculated the sample size as 118 (Soper, 2016), using the parameters shown in Figure 9:

 A-priori Sample Size Calculator for Multiple Regression

This calculator will tell you the minimum required sample size for a multiple regression study, given the desired probability level, the number of predictors in the model, the anticipated effect size, and the desired statistical power level.

Please enter the necessary parameter values, and then click 'Calculate'.

Anticipated effect size (f^2): ***

Desired statistical power level:

Number of predictors:

Probability level:

Minimum required sample size: 118

▶ Related Resources

[x³ Formulas](#) [References](#) [Related Calculators](#) [Search](#)

Figure 9. Calculation of sample size using Soper.

Procedures for Recruitment, Participation, and Data Collection

To begin the process for recruitment for the individual real estate developers, it was necessary to know who the real estate developers of healthy communities are. The Town News website had a downloadable list of the TNDs (healthy communities), from which to find the developer. This was done via the following steps:

1. A Google search for the TND website was done. This website provided the address and county location, a point of contact for the onsite manager, and some history on the developer or founder of the property.
2. If the real estate developer information was not on the TND website, then a google search was done to obtain the contact information of the developer.
3. Online county and state public records may also have been used to get specific developer contact information, but they were not needed in this study.

4. After the developer's email address was found, an email was sent that included the introduction to the survey and instructions, an informed consent to be completed, and the unique link to the survey via www.SurveyMonkey.com.
5. If no direct email address was found, the information in step 4 above was sent using the "Contact Us" for on the website.

Similarly, the comparison group of individual real estate developers for age restrictive active communities was downloaded from www.TopRetirements.com.

1. The download for the list of individual real estate developers of the comparison communities were obtained using the database filters for the search included individual real estate developers (a) all 50 states, (b) '55+ or age restricted,' and (c) 'all amenities.'
2. A Google search for the age restrictive active community's websites was done. This website provided the address and county location, a point of contact for the onsite manager, and some history on the developer or founder of the property.
3. If the real estate developer information was not on the age restrictive active community's website, then a google search was done to obtain the contact information of the developer.
4. Steps 4 to 5 above were repeated with this group.

Email was the chosen method of contact because it is inexpensive, produces a reasonable response rate, and is noncoercive (Boshier, 1990; Selwyn & Robson, 1998).

The introductory email highlighted the nature of the survey, provided the consent form.

Because a sufficient sample size was not reached, the study went on for a month to maximize sample size. When the survey response time of 30 days had elapsed, the final list of the TNDs included in the study were identified, that was minimal due to the low response rate. The last page of the survey incorporated a thank you page as the last page of the survey, and information on how they could obtain the results of the study. No follow up information was needed.

Instrumentation and Operationalization of Constructs

The instrument that was initially used to collect the data to answer the research questions were derived from Carnoske et al. (2010) with the St. Louis Prevention Research Center's Study of Health in Families in Transition (SHIFT) (see Appendix G). This study adopted the survey instrument developed by the Robert Wood Johnson Foundation in conjunction with the researchers at the Washington University in St. Louis Prevention Research Center (PRC) (Prevention Research Center in St. Louis, 2010). The SHIFT research team used the tool to collect developer and realtor perspectives on key factors on building, living, and the future for TNDs. Permission to use the tool was granted on September 22, 2015 (see Appendix O).

The way in which the tool formatted was cumbersome, lengthy, without flow, and difficult to input into SurveyMonkey. As a result, I reformatted it not only to use it on SurveyMonkey more efficiently and effectively, but mapped the variables more accurately to the questions (see Appendix P). The subsequent permission to alter and restructure the questions, and reconstruct the sentence form was also obtained on April 6,

2016 (see Appendix Q). This tool used a Likert-scale, with responses of 1-*not at all influential*, 2-*slightly influential*, 3-*somewhat influential*, 4-*very influential*, 5-*extremely influential*, and 0-*no opinion*. The tool for the TND participants was input into SurveyMonkey can be found in Appendix M. A similar tool was used for the Age Restricted Active Community developers (see Appendix N). Although identical in questions, two surveys were developed because the term “TND” is used throughout the one survey, and the term “Age Restricted Active Community” throughout the comparison survey.

For the PRC tool, real estate developers were selected from 5000 members of the National Association of Home Builders (NAHB), but only those members with residential experience were eligible to participate in the 20-question online survey. Although the survey tool has been used in previous work and approved by SHIFT researchers and the SHIFT protocol committee, the SHIFT researchers noted that some survey items were not rigorously tested for reliability thereby allowing bias to impact the study results (Carnoske et al., 2010). Eventually, due to the low response rate to these two tools, another plan for recruitment, participation, and data collection was executed, using secondary data from a ULI study, and the constructs were operationalized in a similar manner from the original PRC study. Appendix J contains operationalization details for the Infrastructure 2014 study.

Operationalization of Each Variable

Real estate developers' perceptions of the use of comprehensive plans. A comprehensive plan outlines how to create a built environment for health. (Ricklin & Musiol, 2011). It can also be used to provide planners with indicators to assess and measure a community's goals of well-being, economic development, conservation, environmental and public health, transportation, land use, housing, community education, and human dignity indicators (Phillips, 2003) for the next 10 to 20 years. Likewise, a Health Impact Assessment (HIA) provides advice to policy makers specifically on how to make the built environment supportive of good economic and physical health through community design (Centers for Disease Control and Prevention, 2015). A multidisciplinary HIA can be done before a project plan is approved, such as a land redevelopment project (Jacobson, DeCoursey, & Rosenberg, 2011), or during the development of a comprehensive plan (Schively et al., 2007). For my research, this IV was measured as ordinal data using a Likert-type scale. The SHIFT tool included questions specific to the contents of a comprehensive plan, including the built environment topics of land use, transportation, community facilities, houses, open spaces, environmental issues, climate, and the physical and mental health related aspects of the community, such as physical activity, public health and safety, healthy foods, health care access, social capital, and trends (Forsyth et al., 2007; Ricklin, & Musiol, 2012). There were 14 questions measuring comprehensive planning.

Secondary data from the ULI research operationalized comprehensive plans by the study's focus on aspects of infrastructure, human transit, recreation, parks and open spaces, consumer demands, clean air and water, and quality health care that are holistic to the built environment. There were 21 questions used that formed a composite measurement of comprehensive plans.

Real estate developers' perceptions of finance policies. Finance as an IV was operationalized through evaluation of answers within the survey that were sent to the real estate developers. This indicated antiquated policies, specifically, the ease or difficulty in getting traditional bank financing for mixed-use developments, infrastructure costs, market demand and value, availability of government initiatives, and tax incentives. For this research, this IV was measured as ordinal data using a Likert-type scale. The tool included questions specific to tax incentives, clearing and building requirements, mortgages, rent premiums, marketing benefits, impact fees, and infrastructure costs. There was 23 questions that were used in order to measure finance policies. The ULI research operationalized finance policies to include questions on tax structure, financial incentives, payments, value capture strategies, and financial contributions from government for infrastructure. There were 15 questions that were used to form a composite measurement for finance policies.

Real estate developers' perceptions of zoning policies. Zoning was operationalized through a variety of considerations through evaluation of responses within the survey sent to the real estate developers. These included affordable housing

requirements, land-use and automobile-centric transportation policies, mixed-use zoning and density policies, and redevelopment in contaminated areas. For this research, this IV was measured as ordinal data using a Likert-type scale. The tool included questions specific to density, zoning codes and regulations, land use policies, and affordable housing. There was nine questions that were used in order to measure zoning policies.

The ULI research operationalized zoning policies to include factors of development/building regulations, public transit and transportation, well maintained roads, parking, and walkable development. There were 20 questions that formed a composite measurement for zoning policies.

Real estate developers' decisions. The DV was real estate developers' decisions on what type of communities to build. The DV answered the general question "Will real estate developers decide to build healthy communities?" This was answered nominally by a dichotomous response: (0) No or (1) Yes, such that that the IV being tested either had an effect (Yes) or did not have an effect (No) on real estate developer's decisions to build a healthy community. The surveys in Appendices M and O were used to identify the factors that real estate developers use in their decision making process.

Data Analysis Plan

IBM SPSS, version 21.0 was used for data analyses. Data cleaning and screening included seeking missing data, normality, linearity, outliers, and multicollinearity. Details of this process can be found in Chapter 4. The three IVs were operationalization (see Appendix J), transformed into a composite measurement, assumed continuous, that

they were normally distributed, and had a large enough sample size; therefore, parametric tests were be used.

Threats to Validity

External Validity

There were several threats to external validity in this study. I employed purposeful sampling when conducting this study, that created selection bias (Creswell, 2009; Tongco, 2007). Participants were real estate developers working within the United States, and identified by a list of developed healthy communities or 55+ communities. The greatest threat posed in this study to external validity was generalizations to the population of real estate developers that specialize in building New Urbanism and Age Restricted Active Communities. An important determinant of generalizability is the representativeness of the sample. Because data for both the SHIFT and ULI studies were collected from a nonprobability sample, the generalizability of my finds was limited. In fact, Gobo (2004) posited that if a study “is not carried out on a representative sample, its findings are not generalizable” (p. 449). The use of standardized lists of developments from The Town Paper and TopRetirements.com strengthened the representativeness of the sample. Generalizability is also influenced by the sample size of a study and it must be large enough to be statistically significant (Creswell, 2009; Laerd, 2012; Trochim, 2006). If the sample size is not large enough, it cannot be generalized to all populations. The stronger the external validity, the more reproducible the study will be.

Internal Validity

Concurrently, there were several threats to internal validity. Although the originally planned survey was not expected to take more than 30 minutes to complete, maturation may have occurred if the participant was distracted by other phone calls or office interruptions. If an interruption did occur, the participant used the same link to re-enter the survey tool and pick up where the participant stopped. Using SurveyMonkey.com for the online survey with simple questions minimized testing effects and instrumentation by making it easy for the participant to complete the survey. Likewise, the ULI study was sent out via email to leaders identified by survey authors. Experimenter bias could have impacted internal validity by the way survey questions were worded, but using a validated tool minimized experimenter bias. The defined and operationalized constructs, measured variables, and the developed methodology in this study also threatened external validity. Further, all extraneous and confounding variables in the assessment and conclusions needed to be considered generalizable so that they did not become confounding variables and alter the variables' relationships. Because correlation is not equal to cause, variables were controlled correctly (Novella, 2009). Also, there were several assumptions that governed this study. It was assumed that the real estate developers answered the voluntary survey questions honestly and completely. It was also assumed that I entered the data into SPSS correctly, and ran the appropriate tests correctly and that the results were interpreted accurately. Accuracy was double checked by methodology coach.

Ethical Procedures

There was no treatment of human participants for this study, either the initial procedures via survey, nor the use of secondary data that ultimately was used. Real estate developers identified for inclusion in this study were contacted by email, and had the right not to participate without any negative consequences. Participants had the right for anonymity and privacy by using a consent form that was completed prior to the survey, and a secure, unique, and specific participant hyperlink to the survey. Li, Liu, and Jin's (2014) research of privacy concerns indicated that the higher the degree of personalization the lower the user's privacy concerns.

The developers received an explanation of the study in writing via email, and only questions relevant and applicable to the study were included in the survey. Further, SurveyMonkey has two privacy policies: one for the survey creators, the other for the survey respondents. The survey data is owned by the survey creator, respondents' email addresses are safeguarded and data held securely on servers located in the United States. SurveyMonkey allowed the creator to configure responses to provide respondent anonymity (SurveyMonkey, 2015). Access to the data was only be given to the researcher using a password protected account.

For the Infrastructure 2014 study, the individual responses were kept confidential and the data reported in the aggregate only. The researchers obtained some volunteers for a brief follow up interview that elaborated on the real estate developers' views or experiences. These questions or their answers were not included in my study.

Summary

In this chapter, I provided an overview of the research design and rationale, the inquiry, methodology, research questions with hypotheses, threats to validity, and ethical procedures that were used as safeguards to protect the rights of participants. A quantitative regression analysis was utilized. Participants in the study who provided secondary data completed a level of concern Likert-type survey with areas for participant comments regarding the facilitators and barriers to their development of healthy communities and New Urbanism. Lastly, in Chapter 3 I set the framework for Chapter 4, and provided a detailed discussion of this study's results, procedures used, and data collection processes that occurred.

Chapter 4: Results

In this quantitative study, guided by the urban planning theory, I explored the degree to which comprehensive plans, finance, and zoning policies predict the likelihood that real estate developers will build certain types of communities in the United States.

There were two research questions:

RQ1: Are comprehensive plans, finance policies, and zoning policies significant predictors of the likelihood that real estate developers' decisions will build healthy communities in the United States?

H_0 : Comprehensive plans, finance policies, and zoning policies do not significantly affect real estate developers' decisions to build healthy communities.

H_1 : Comprehensive plans, finance policies, and zoning policies significantly affect real estate developers' decisions to build healthy communities.

RQ2: If the answer is yes to Research Question 1, then to what degree do comprehensive plans, finance, and zoning policies influence real estate developers' decisions on the type of communities to build in the United States?

In this chapter, I present a description of the data collection and process, comprehensive results of the multiple regression analysis beginning with the explanation of secondary data use, construction of variables, and testing assumptions to statistically analyze the data and conclude with a final summary of the results.

Data Collection

The initial data collection began on August 19, 2016 according to the process described in Chapter 3. When the response rate was far below what was needed for the study, a request for change in procedure was sent to Walden University's IRB, that was subsequently approved November 3, 2016. As a result, the CNU was contacted for the TND survey, and the NAHB was contacted for the age restricted active communities. Both organizations agreed to contact their members via an emailed newsletter with details of the survey and the appropriate link to the Survey Monkey tool if they agreed to take part in the study. However, this procedure also did not produce an adequate response rate. Hence, another request for change in procedure to use another study by the ULI and Earnest and Young was approved on January 20, 2017, and permissions, raw data, and the original survey questionnaire were obtained (see Appendices U and V). Table 4 summarizes the time frames and difficulty with data collection.

The Infrastructure 2014 study surveyed 241 public sector and 202 private sector respondents. For this study, the responses from the public sector were disregarded because they were irrelevant to this study's research questions. The analysis was focused on the private developers, investors, lenders and advisors, the demographics of which can be found in Table 5. Two participant responses out of the 202 collected responses were incomplete and were not included in the study.

Table 4

Summary of IRB Requests

| Action | IRB request date | IRB approved date | Approval Number | Methods | # Surveys sent date | # surveys sent | Responses rate |
|------------------------------------|------------------|-------------------|------------------|---|--------------------------------|--|--|
| IRB original | 7/23/16 | 8/7/16 | 08-05-16-0356102 | Compiled databases of TNDs and 55+, as described in Ch. 3 | 8/19/16 | TND: 317 55+: 231 surveys + 127 web contact forms | TND: 10/317= 3.14% 55+: 11/358= 3.07% |
| IRB 1 st change request | 11/3/16 | 11/16/16 | 08-05-16-0356102 | National organization s sent out requests | TNDs: 12/7/16 55+: 12/26/16 | Their membership, number unknown | TND: 0 55+: 0 |
| IRB 2 nd change request | 1/10/17 | 1/20/17 | 08-05-16-0356102 | Request to use secondary data | | | |

Table 5

Demographics of Respondents

| Where is your firm involved in real estate activities? Check all that apply. [<i>N</i> = 202] | |
|--|-----|
| United States | 85% |
| Canada | 8% |
| Other North America | 5% |
| Europe | 19% |
| South America | 1% |
| Asia Pacific and/or Australia | 18% |
| Middle East/Africa | 3% |
| Don't know/Refused | 2% |

The data were transformed to fit the needs in answering my research questions.

The survey tool used a Likert scale, with 1 being the highest and 6 being the lowest (1-

top consideration, 2-very important, 3-somewhat important, 4-not very important, 5-not a factor at all, 6-don't know/refused), and the responses all went in the same direction.

Appendix J contains the operationalized details on the actual survey questions separated into those questions that related to the IVs of comprehensive plans (21 questions), zoning (15 questions), and finance policies (11 questions), and the DV (19) questions. Because Beldon (2014) was unable to provide a codebook or explanation of weighted values, if there were any, I had to be satisfied with proxy measures (Appendix I). Beldon's data results were presented in percentages and then manually converted into numbers and input into an SPSS v21 file. The three ordinal IVs were then transformed into an interval composite variable. The DV in the analysis began as an ordinal scale variable that was then converted to a composite of all the survey questions that were unrelated to comprehensive plans, zoning policies, and finance policies. This ordinal scale variable was then transformed to a suitable dichotomous variable (no = 0, yes = 1). Table 6 highlights the variables and survey questions that were used for the composite measurements. More details of the survey questions used can be found in Appendix J.

Table 6

Variables and Corresponding Survey Questions

| Variable | Indicating questions used for the composite |
|---------------------|--|
| Comprehensive plans | Q10a,d,h, Q11b,c,i,k,m,n, Q12b,c,i,k,m,n, Q13b,c,i,k,m,n |
| Zoning policy | Q10f,Q11a,d,e,g, Q12a,d,e,g, Q13a,d,e,g, Q14b,e |
| Finance policy | Q10e, Q14h,i, Q15a,b,c,d,e,f,g |
| Dependent variable | Q10b,c,g, Q11f,h,j,l, Q12f,h,j,l, Q13f,h,j,l, Q14a,c,d,f,g |

The survey analysts could not provide the total number of invitations sent to the members of the organizations (Beldon, 2014). Therefore, the response rate was

unavailable. Determining the valid inferences about a larger population could not be possible because the sample used may not have been sufficient or not a good representative of the target population; therefore, the estimation of confidence intervals and significance tests were problematic. The bootstrapping resampling method was used to overcome these problems.

Study Results

Statistical Assumptions

I tested the null hypotheses by regression analysis, that shows whether an IV has an effect on the outcome of the DV and the depths of those effects. Several assumptions had to be met to determine appropriateness of regression analysis (Laerd Statistics, 2015).

1. Variables: There was a dichotomous DV; there were two or more IVs that were either continuous or nominal; there was independence of observations; and the categories of the variables were mutually exclusive and exhaustive.
2. Sample size: The sample size was large enough, based on the calculation formula of 20 participants per each IV. In this study, there were 20 participants, that was then multiplied by 3 (Statistics Solutions, 2017), for a sample size of at least 60 total participants. Using this formula then, the minimum sample size of 60 was met. To also verify that the sample size was sufficient for making reliable inference, I resampled 1,000 samples from the data using the bootstrapping method. To determine the adequacy of the model,

bootstrapping estimates were used to construct the confidence interval to compare the original sample estimates and the bootstrap estimates.

3. **Linearity:** To test the assumption of a linearity, a linear relationship between the interval IVs and the logit transformation of the DV was needed and was tested using the Box-Tidwell (Box & Tidwell, 1962) approach. As seen in Table R1, the IVs are linearly related to the logit of IVs. Based on this assessment, all continuous IVs were found to be linearly related to the logit of the DV resulting in statistical significance being accepted when $p < .05$. Another method to test the linearity of the variables graphically was to build a scatter plot against each pair of variables (Appendix S). These graphs shows linear relation between each variables, therefore supporting the linearity assumption.
4. **The data must not show multicollinearity.** Multicollinearity exists when two or more of the IVs are highly correlated, meaning there is some redundancy in the IVs, limiting proper data analysis and conclusions. Correlation coefficients and tolerance/variance inflation factor (VIF) values were performed to determine if the data met or violated this assumption. Tolerance is an indication of how much of the variability of a specific IV is not explained by the other IVs in the model. A score very small, less than 0.10, suggests multicollinearity; therefore, the scores in Table R2 show that the comprehensive plans, zoning policies, and finance policies, had a tolerance

factor of 0.014, 0.013, and 0.043 respectively, indicating multicollinearity; therefore, this assumption was not met. Secondly, the VIF quantified how much the tolerance has been inflated. Values above 10 indicate collinearity. The values seen in Table R2 for the VIF score were far above the value of 10; therefore, collinearity was high, so the data again did not meet the assumption of multicollinearity. This indicated that there were serious problems with the data being analyzed using a logistic model.

Multicollinearity is important because it reduces the amount of data available when testing the effects of each individual variable with each other variable. The odd ratio of each variable would not be correctly interpreted, thereby not having correct statistical inferences. Hence, multicollinearity potentially impacted my second research question because I was interested in the degree to which the individual variables affect the DV.

There were several options that could have corrected the multicollinearity assumption. One was to find a different IV or to remove one. I chose not to do this because of needing the data to answer my research question and the limited number of variables available in the secondary data. Another was to increase the sample size, but since I was using secondary data, this counter option was not viable. I could have chosen to follow Gujarati's (2003) advice: Do nothing. However, since I used secondary data, there was very little I

could do to change a “data deficiency problem” (p. 263). What I chose to do to have a model more predictive was to use bootstrap resampling methods.

5. The data should have no significant outliers, high leverage points or highly influential points. Casewise diagnostics (Table R3) were run in order to detect outliers. These unusual cases have residuals 2.5 or more (above 2.5 or below 2.5) standard deviations from the mean and were the cases that may have the largest errors and also be outliers. There were two studentized residuals with values of 3.076 and 2.948 standard deviations, that were removed from further testing. After the assumptions were examined, the regression analysis was run in SPSS, providing the information to report the results.

Data Cleaning and Interpretation of the Results

1. Data coding: There were no missing cases and the expected number of cases was confirmed. The correct coding was used (No = 0, Yes = 1).
2. Baseline analysis: Initial consideration of the predictive logistic model when the model includes just the constant and no IVs was given. The Classification Table (Table R4) indicates that with a logistic approach to the prediction the response variable is correct 78.4% of the time to predict real estate developers' decisions on building healthy communities. The baseline model with the constant is statistically significant, $wald(1) = 27.220, p = .000$ (Tables T5, T6).

3. Logistic regression results: The Omnibus Tests of Model Coefficients (Table R7) indicated that the model improved in accuracy by adding the IVs (chi-square = 72.748, $df = 3$, $p < .0005$). The Hosmer and Lemeshow goodness of fit test (Table R8) was used to determine if the model was poor at predicting the categorical outcomes. Because the test was not statistically significant ($p = 1.000$), the model was not a poor fit. The Cox & Snell *R* Square and Nagelkerke *R* Square (Table R9) values identified how much variation in the DV was explained by the model. Based on these tests, 52.8% to 81.4% of variation in the decisions of real estate developers was as a result of the additive effect of comprehensive plans, zoning policies, and finance policies.
4. Category prediction: Table R10 indicates that the percentage accuracy in classification is 93.8%, after the IVs were added to the model. Of the participants who would build healthy communities, 92.1% of the participants were classified to build healthy communities. Likewise, 100% of participants were correctly classified that they would not build healthy communities.
5. Variables in the equation: Table 8 shows that when variables are added to the model, comprehensive plans, zoning policies, and finance policies showed statistical significance at 0.05 level of significance with standard error values of 49.249, 29.878, and 38.832 respectively.

Research Questions

Research Question 1: Are comprehensive plans, finance policies, and zoning policies significant predictors of the likelihood that real estate developers would build the type of communities to build in the United States?

H_0 : Comprehensive plans, finance policies, and zoning policies do not significantly affect real estate developers' decisions to build healthy communities.

H_1 : Comprehensive plans, finance policies, and zoning policies significantly affect real estate developers' decisions to build healthy communities.

Analysis of variance (ANOVA; Table R9) and measures of associations (Table R10) were conducted to explore the impact degree of each IV on the decision of real estate developers to build healthy communities. The effect of comprehensive plans was statistically significant on real estate developers' decisions to build healthy communities, $F(5,91) = 21.014$, $p < .05$, and independently contributed 53.6% to the variation in decisions. The effect of finance policies was statistically significant on real estate developers' decisions to build healthy communities, $F(6,90) = 37.887$, $p < .05$, and independently contributed 71.6% to the variation in decisions. The effect of zoning policies was statistically significant on real estate developers' decisions to build healthy communities, $F(5,91) = 16.024$, $p < .05$, and independently contributed 46.8% to the variation in decisions.

The ANOVA, the linearity tests, the goodness of fit, the adequacy of the logistics model, and the regression analysis (Table 7) identified that 52.8% to 81.4% of variation

in the decisions of real estate developers was as a result of the additive effect of comprehensive plans, zoning policies, and finance policies. These results provided limited value, as indicated by the high standard error. Since multicollinearity existed when all three IVs were present, I could have dropped one of the IVs from the model, but I employed the bootstrap resampling method to improve measures of accuracy. Table 8 is the Bootstrap summary Table Rhat indicated that when IVs were added to the model, comprehensive plans, zoning policies, and finance policies showed statistical significance at 0.05 level of significance with standard error values of 49.249, 29.878, and 38.832 respectively. Based on the results of these tests, I rejected the null hypothesis that comprehensive plans, finance policies, and zoning policies do not significantly affect real estate developers' decisions to build healthy communities. I accepted the alternative hypothesis that comprehensive plans, finance policies, and zoning policies are significant predictors that affect real estate developers' decisions to build healthy communities. The predictive model for possible decision of real estate developers to build communities is

$$H_i = \exp[-87.372 - 221.105\text{compreh_plan} + 132.211\text{zoning_policies} + 159.054\text{finance_policies}]^{-1}$$

H_i is the probably of real estate developers making decisions to build healthy communities given comprehensive plans, finance policies, and zoning policies.

Table 7
Variables in the Equation

| | B | S.E. | Wald | df | Sig. | Exp(B) | 95% C.I. for EXP(B) | |
|---|----------|-----------|------|----|------|-----------|---------------------|-------|
| | | | | | | | Lower | Upper |
| Step 1 ^a Comprehensive_Plans | -221.105 | 24425.582 | .000 | 1 | .993 | .000 | .000 | |
| Zoning_Policies | 132.211 | 13900.323 | .000 | 1 | .992 | 2.621E+57 | .000 | |
| Financing_Policies | 159.054 | 25417.316 | .000 | 1 | .995 | 1.192E+69 | .000 | |
| Constant | -87.372 | 7307.201 | .000 | 1 | .990 | .000 | | |

a. Variable(s) entered on step 1: Comprehensive_Plans, Zoning_Policies, Financing_Policies.

Table 8
Bootstrap for Variables in the Equation

| | B | Bootstrap ^a | | | 99% Confidence Interval | |
|----------------------------|----------|------------------------|------------|-----------------|-------------------------|---------|
| | | Bias | Std. Error | Sig. (2-tailed) | Lower | Upper |
| Step 1 Comprehensive_Plans | -221.105 | 31.021 | 49.249 | .002 | -268.199 | -34.719 |
| Zoning_Policies | 132.211 | -15.952 | 29.878 | .001 | 9.880 | 179.204 |
| Financing_Policies | 159.054 | -18.509 | 38.832 | .002 | 17.463 | 218.228 |
| Constant | -87.372 | 2.831 | 5.065 | .001 | -102.096 | -66.527 |

a. Unless otherwise noted, bootstrap results are based on 1000 bootstrap samples

Research Question 2: If the answer is yes to Question 1, then to what degree do comprehensive plans, finance, and zoning policies influence real estate developers' decisions on the type of communities to build in the United States?

Based on the Eta-squared test, the data analysis showed that the IVs comprehensive plans, finance policies, and zoning policies significantly influenced the real estate developers' decisions on the type of communities to build in the United States by 53.6%, 71.6%, and 46.8% respectively. These data can be used for future decision making and/or research.

Summary

A logistic regression was performed to determine if comprehensive plans, finance policies, and zoning policies are predictors of the likelihood that real estate developers would build the type of communities to build in the United States. Linearity of the continuous variables with respect to the logit of the DV was assessed via the Box-Tidwell (Box & Tidwell, 1962) procedure. Based on this assessment, all continuous IVs were found to be linearly related to the logit of the DV. There were two studentized residuals with values of 3.076 and 2.948 standard deviations, that were removed from the analysis. The logistic regression model was statistically significant, $\chi^2(3) = 101.353$, $p < .05$. The model explained 81.4% (Nagelkerke R^2) of the variance in real estate developers' decisions to build healthy communities and correctly classified 100.0% of cases. Sensitivity was 100%, specificity was 0%, positive predictive value was 78.4% and negative predictive value was 0%. Although human decisions are not always logical and predictable, the adequacy of the model supports that real estate developers' decisions are affected by comprehensive plans (53.6%), finance policies (71.6%), and zoning policies (46.8%).

Although the original data collection process as described in Chapter 3 was not executed, a second methodology was used. This second method utilized secondary data from an Urban Land Institute study that was sufficient to answer the research questions for this study. The secondary data of 202 surveys were entered into SPSS, prepared and

converted for analysis, and the data were then analyzed. The study used logistic regression analysis to answer the research questions.

For research question 1: Are comprehensive plans, finance policies, and zoning policies significant predictors of the likelihood that real estate developers would build the type of communities to build in the United States?

Yes, comprehensive plans, finance policies, and zoning policies are significant predictors of the likelihood that real estate developers will build health communities in the United States.

H₀: Comprehensive plans, finance policies, and zoning policies do not significantly affect real estate developers' decisions to build healthy communities.

H₁: Comprehensive plans, finance policies, and zoning policies significantly affect real estate developers' decisions to build healthy communities.

Based on the output obtained from the ANOVAs, I rejected the null hypothesis.

For research question 2: If the answer is yes to Question 1, then to what degree do comprehensive plans, finance policies, and zoning policies influence real estate developers' decisions on the type of communities to build in the United States?

The data analysis showed that the IVs comprehensive plans, finance policies, and zoning policies significantly influence the real estate developers' decisions on the type of communities to build in the United States by 53.6%, 46.8%, and 71.6% respectively.

In the following chapter, I provided a brief introduction to the study, the interpretation of the findings, the limitations of the study, and recommendations for

further research. The study's potential impact for social change and a strong conclusion ended the research.

Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this quantitative study was to use the urban planning theory to explore the degree to which comprehensive plans, finance, and zoning policies predict the likelihood that real estate developers will build certain types of communities in the United States. This was done by using secondary data from a survey of 200 private developers, investors, lenders, and advisors across the United States to discover their thoughts about how infrastructure influences their work and future development plans. I used logistic regression analysis with the IVs of the influence of comprehensive plans, finance policies, and zoning policies to predict the outcome or explain the relationship on the DV of the real estate developers' decisions to build. Key findings identified that comprehensive plans, zoning policies, and finance policies significantly affected what real estate developers choose to build, by 53.6%, 46.8%, and 71.6% respectively.

Interpretation of Findings

The study was conducted to identify influential policies that promote or inhibit real estate developer's decisions to build healthy communities. Numerous researchers have indicated the built environment where one lives and works impacts a person's health and psychological development (Bloom et al., 2011; Braunstein & Lavizzo-Mourey, 2011; Cummins et al., 2007; Ding & Gebel, 2012; Ewing et al., 2014; Lavizzo-Mourey, 2012; McGinnis et al., 2002; Meridian Planning Consultants, 2011; PolicyLink, 2014; Woolf & Braveman, 2012; World Health Organization, 2008). The findings in this empirically based research could facilitate improved policies and practices, that in turn

could help to improve overall health, reduce chronic illness and health care costs, and generate socially responsible and profitable financial, social, and environmental returns.

The information presented in this study is important to urban planners/designers, health care professionals, and municipal officials because of the intradisciplinary approach of the built environment as a nonmedical determinant of health. Building communities that facilitate healthy choices improve population health and economic development by stimulating job growth that is important to economists and are important to policy makers to further facilitate improvements in housing and education (Miller et al., 2011). Knowing what barriers exist and how to facilitate better decisions in building healthy communities may assist policy makers on reevaluating policies that prohibit or stimulate development of healthy communities. Investors may want to invest in building healthy communities because of the greater impacts on health, environment, social capital, and economic development and growth.

If policies could address the factors that promote or inhibit real estate developer's choices on the types of communities to build, real estate developers may be more innovative and effective in providing healthy communities to meet customer demand and assist with affordable housing initiatives. I evaluated how the institutional environment, community, and public policy factors interact with real estate developers to improve population health by maximizing the health benefits of the built environment. I additionally added to the Institute of Medicine's Guide to Community Preventive

Services: Sociocultural Environment Logic Framework (2002; see Figure 6) research by identifying a pathway that the IOM researchers had not been previously examined.

In the early phase of policy development, SEF and urban planning theory should be considered to determine the long term and/or unintended consequential health impacts of policy on population health. SEF and urban planning theory combined set the framework in this research by discovering what policies impact real estate developers' choices to building healthy communities. I determined that comprehensive plans and zoning policies were significant drivers of real estate developers' choices.

According to the SEF, when there are organizational programs in place, community factors can focus on safe, accessible, and reliable transportation, fitness and recreation opportunities, construction of safe green space and walking/biking lanes, and availability and affordability of healthy fruits and vegetables that can further facilitate behavior change and promote healthy eating and physical activity. In this study, I focused on the built environment relative to community factors and public policy levels. These factors were addressed in the survey questions to which comprehensive plans and zoning policies were significant influencers on real estate developers' decisions on what types of communities to build.

The New Urbanism planning theory as subscribed by CNU in 1993 provided the theoretical framework for this study. Urban planning theory argues that several factors affect health through built environment. Urban planning theory, and the movement of New Urbanism, features "high-density, transit-and pedestrian-friendly neighborhoods"

with multi-use zoning, sustainability, and affordable housing to address an antidote for sprawl that has been implicated as one factor in the rise of obesity (Fainstein & Campbell, 2012, p. 13) and a public health approach to where people live, work, and play (Barton, 2005). Also, planning theory considers the circumstances by which planners and stakeholders can produce a better environment for the people living there (Fainstein, 2012). This study supported the urban planning theory that the factors of comprehensive plans and zoning policies affected real estate developers' decisions on what types of communities to build, and consequently those community designs may affect health negatively.

One key finding in the 2014 ULI research that provided the secondary data for this study was that transportation was cited as the top issue to holding back real estate development (as cited in Galloway et al., 2014). Land use and transportation policies have been identified as partial culprits responsible for the rise in obesity (American Planning Association, 2007). ULI survey questions regarding land use and transportation were averaged for the construct of zoning policies; thus, the findings in this study and the ULI study were consistent, citing zoning policies as influencing their decisions for development. Garde (2006) also identified zoning policies as barriers for developers who included existing land-use regulations and approval and permit processes that take longer than suburban designs. Likewise, the zoning policies in this study comprised of questions regarding passenger connections, sufficient parking, and sufficient public transit services were also consistent with the ULI study findings.

Ninety percent of the public sector developer respondents in the ULI study considered consumer demand, a factor in comprehensive plans, as influencing their choices for what to build, that was also consistent with the key findings of this study. Consumer demand was also significant driver in prior research by Carnoske et al. (2010), Kirby and Hollander (2004), Leinberger (2005, 2008), and Levine and Inam (2004). My research was also consistent with the ULI study, that found that real estate developers deemed the financial aspects and funding the second most barrier to future development (the first being transportation as stated above). Further, this study supported the research of Steffel Johnson and Talen (2008) and Talen (2011) that financing is difficult, and developers are frustrated by financial and regulatory barriers.

Limitations of the Study

There is little research on the relationship of urban planning theory, development and community policies, the built environment, and health outcomes; hence, this study may be more exploratory than correlational. Regression analysis only discovers relationships; it does not determine the underlying cause. The validity and reliability of the survey instrument could have been a potential limitation. Every possible consideration was given to the constructs in the literature, but there was still a question of its effectiveness.

If the initial survey tool (Carnoske et al., 2010) had been used, there would have been reliability issues because some of the survey items were not rigorously tested, that could have allowed bias to impact the study. Due to challenges with obtaining

appropriate sample size, the ULI study was used for secondary data. This added significantly to the limitations of this study. Because Beldon (2014) was unable to provide a codebook or explanation of weighted values, if there were any, or operational definitions of the variables, the internal and external validity of the data were limiting, and accuracy, validity, and reliability of the data were unknown. Also, valid inferences about a larger population cannot be made because the sample was not representative of a population and confidence intervals and significance tests cannot be estimated. Hence, I had to be satisfied with proxy measures to complete my analysis. This put into question the reliability of the conclusions that I drew from the results. However, the bootstrapping sampling method helped to overcome insufficient or poor representations of the target population to improve the estimation of confidence intervals.

I received the data as results in percentages. I manually converted responses into numbers and input these numbers into an SPSS v21 file. From there, I was able to get the average of each question and variable to form my constructs so that I was left with three IVs and one DV to perform the regression analysis. Errors could have occurred due to inappropriate transformation of data.

Numerous diagnostics were performed to test assumptions, and multicollinearity was identified. Multicollinearity may have skewed the effects of the IVs on the DV. One solution for overcoming multicollinearity was to drop some variables from testing, that was not done due to the limitations of the nature of the secondary data. Consequently,

interpretations could not be made uniquely about each IV on the DV, but only as a whole model effect. Multicollinearity also limits the reliability and robustness in prediction.

The ULI study was created to answer specific questions for the original researchers. My research questions differed, the appropriateness of the data was questionable, and my research questions may have only been answered partially, thereby reducing the validity of my results. Further, because I used statistical tests, there may have been the possibility of experimental errors. Type I errors could have indicated that the null hypothesis was correct (α -error, false positives) despite it being rejected. Conversely, type II errors (β -errors, false negatives) could have indicated that the hypothesis was correct despite it being rejected (Kalla, 2009).

Recommendations

The medical community can no longer be responsible for addressing all the social determinants of health, especially when they fall in the realm of different disciplines (Lavizzo-Mourey, 2012; Williams & Marks, 2011) and nonmedical determinants, such as the built environment. Real estate developers, investors, planners, and public officials can directly or indirectly affect what gets built (see Figure 4). There has not been a well-established direct correlation or causal link made empirically between the built environment and improved health outcomes. In this study, I evaluated the steps to get to the built environment and healthy communities by way of policy and input into community development. It was strong in identifying generalized policy issues (with

comprehensive plans and zoning policies), but limited in specificity or causality. Hence, there are several areas for further study:

The IVs could be more specific. For instance, using the variable zoning policies encompasses many specific factors related to zoning, affordable housing, mixed use, and density, and these specific factors could also be used as distinct IVs. For the variable of comprehensive plans, use of specific elements that are included in a comprehensive plan, such as community facilities (schools, libraries, and health care facilities as examples), health impact assessment requirements, and need for walking and bike paths could also be used as specific IVs.

The entrepreneurial framework or theory to identify real estate developers who build healthy communities could be used. Healthy community developers and investors can be seen as entrepreneurs, going against the current methods of the built environment and taking risks for the greater societal benefit (Duany et al., 2000).

More research is needed to determine how theory or a contextual framework is used in relationship to zoning and financial policies, real estate development, and health and the degree of correlation between the built environment and physical activity level characteristics, such as location, population, socioeconomic status, and these effects on population health. Lastly, there is a gap in determining the relationships of the cost benefit of investment to changes to the built environment that would create healthful behaviors.

This research could have been improved by doing a survey specific to data that would more appropriately answer the research question. In order to get a sufficient response rate, I would have contacted the organizations (i.e., CNU, LOCUS, NAHB) first, participated in their conference as a speaker, and made the survey completion part of the overall program. Also, a qualitative study could be done with a few specific states to identify their major challenges in building healthy communities. This could be compared to each state and within the states to learn major policy challenges. In my future research, this would be my next logical step.

Still unresolved is a causal link to determine specific policies that hinder or promote real estate developers' decisions to build healthy communities. More focus is needed for causality research. For example, if x zoning policy were to change to y policy, would real estate developers build healthy communities? I did not determine causality, nor did I identify specific policies that are challenging to real estate developers, but rather I provided a broad scope of a variable for another researcher to further investigate.

Implications

The study was conducted to identify influential policies that promote or inhibit real estate developer's decisions to build healthy communities. Because where one lives matters, the potential implications for positive social change are the indirect improvements in mental and physical well-being, social capital and health impacts, decreased health care costs, stimulation of job growth and economic development, and improvements in policy development in education and housing. By understanding the

factors that could minimize risk and maximize rate of return for developing healthy communities, real estate developers could indirectly and potentially reduce health disparities and facilitate improvements in health relative to changes in social and physical environments throughout the United States.

Urban planning or spatial planning theory attempts to explain a variety of social issues involved with urban development in order to invoke social control or reform (Yiftachel, 1997). With this view, urban planning could be used as an effective tool for positive social change. Further, some researchers have suggested that New Urbanist developers are entrepreneurial, although research on this contextual framework is lacking. Healthy community developers and investors can be seen as entrepreneurs, going against the current methods of the built environment and taking risks for the greater societal benefit (Duany et al., 2000).

Modeling the built environment where people live, work, go to school, and play in relationship to health and healthy behaviors can identify opportunities for improved outcomes via supportive policy, in early intervention and over time. Gortmaker et al. (2011) proposed modeling holistically and synergistically, the overall strategy for initiatives and solutions with government, international agencies, the private sector, civil organization groups, health professionals, and individuals. Absent from their identified players include financiers, planners, and developers. Researchers have agreed that health should be included in all policy making (Adler, 2012; Gortmaker et al., 2011).

Conclusions

Where one lives matters. Since 1990, the built environment has been studied as a health determinant that either enhances or impedes health behaviors (Barton, 2009). Thus, altering the design of the built environment to make it more health promoting by using well-designed, walkable, urban places creates healthy and prosperous communities, provides economic and social benefits, and promotes sustainability and equity (Congress for the New Urbanism, 2015). When communities experience mental and physical well-being their social capital and health care outcomes improve and health care costs decrease (Renalds et al., 2010). Improving population health also has an effect on economic development by stimulating job growth, and further facilitating improvements in housing and education (Miller et al., 2011), all having positive social change implications. Researchers agree that changing correlative factors of the built environment is often a slow process with drivers and barriers associated with policy changes. This study focused on the policy issues that affect real estate developers' decisions to build healthy communities, with a potential positive consequence of improving the relationship of population health and the built environment.

As a result of this study, comprehensive plans, finance policies, and zoning policies had a statistically significant influence on real estate developers' decisions on the types of communities to build in the United States by 53.6%, 46.8%, and 71.6% respectively. The information presented in this study is important to urban planners/designers, health care professionals, and municipal officials because of the

interdisciplinary approach of the built environment as a nonmedical determinant of health. Cultivating public and private collaboration with an interdisciplinary approach to develop public policy could affect social change by indirectly affect the improvements in health outcomes through alterations in the built environment.

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Appendix A: Permission Letter Health Resources in Action

Michele A. Williams
 12001 Old Vine Blvd., Unit 304
 Lewes, DE 19958
 Michele.williams5@waldenu.edu

6 April 2016



Hello,

I am completing a dissertation at Walden University, tentatively entitled "Where One Lives Matters: A Quantitative Study Correlating Policy and Health" under the direction of my dissertation committee chaired by Dr. Anne Hacker. My dissertation examines barriers and challenges that new urbanism real estate developers face in building healthy (complete) communities. I would like your permission to reprint in my dissertation a diagram from the following report:

Health Resources in Action. (2013, July 25). Defining healthy communities. Retrieved from http://www.hria.org/uploads/catalogerfiles/defining-healthy-communities/defining_healthy_communities_1113_final_report.pdf. I would like to use the diagram on page 9.

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To grant this permission, please sign this letter where indicated below and return it to me at Michele.williams5@waldenu.edu. Please contact me via email or my cell, 302-344-0658, should you have any questions or need additional information. Thank you very much.

Sincerely,

A handwritten signature in cursive script that reads "Michele Williams".

Michele A. Williams

PERMISSION GRANTED FOR THE USE REQUESTED ABOVE:

Judi Foley

HRIA

Date: 5/16/16

Appendix B: Permission Letter McLeroy, Steckler, Bibeau, and Glanz (1988)

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Title: An Ecological Perspective on Health Promotion Programs:
Author: Kenneth R. McLeroy, Daniel Bibeau, Allan Steckler, Karen Glanz

Publication: Health Education & Behavior

Publisher: SAGE Publications

Date: 12/01/1988

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Appendix C: Permission Letter RCLCO

Michele A. Williams



3 April 2016

RCLCO
7200 Wisconsin Avenue
Suite 1110
Bethesda, MD 20814

Dear Ms. Healy,

I am completing a dissertation at Walden University, tentatively entitled "Where One Lives Matters: A Quantitative Study Correlating Policy and Health" under the direction of my dissertation committee chaired by Dr. Anne Hacker. My dissertation examines barriers and challenges that new urbanism real estate developers face in building healthy (complete) communities. I would like your permission to reprint in my dissertation excerpts from the following:

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Sincerely,

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RCLCO

Date: 5/31/16

Appendix D: Permission Letter Leinberger (2005)

Walden University Mail - (no subject)

<https://mail.google.com/mail/u/0/?ui=2&ik=8b7e008d52&view=pt&sea...>Michele A. Williams


4 December 2015

Christopher B. Leinberger
cleinberger@brookings.edu

Dear Mr. Leinberger,

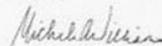
I met you at the 2014 APA DE/MD Regional Planning Conference in Newark when you were the Tuesday lunch keynote speaker, and indicated that I would be using some of your work in my dissertation. I am completing my dissertation at Walden University, tentatively entitled "Where One Lives Matters: A Quantitative Study Correlating Policy and Health" under the direction of my dissertation committee chaired by Dr. Anne Hacker. My dissertation examines barriers and challenges that new urbanism real estate developers face in building healthy (complete) communities. I would like your permission to reprint in my dissertation excerpts from the following:

Leinberger, Christopher B. (2005). Creating Alternatives to the Standard Real Estate Types (The Need for Alternatives to the Nineteen Standard Real Estate Product Types) [Research and Debate]. *Places*, 17(2), 24, p. 27 [chart].

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To grant this permission, please sign this letter where indicated below and return it to me at Michele.williams5@waldenu.edu. Please contact me via email or my cell, 302-827-3575, should you have any questions or need additional information. Thank you very much.

Sincerely,



Michele A. Williams

PERMISSION GRANTED FOR THE USE REQUESTED ABOVE:



Christopher B. Leinberger

Date: 12/3/15

Walden University Mail - (no subject)

<https://mail.google.com/mail/u/0/?ui=2&ik=8b7e008d52&view=pt&sea...>**Michele Williams** <michele.williams5@waldenu.edu>

(no subject)

1 message

Christopher Leinberger <cleinberger@email.gwu.edu>
To: michele.williams5@waldenu.edu

Sat, Dec 5, 2015 at 11:59 AM

good luck.

Christopher B. Leinberger
Charles Bendit Distinguished Scholar and Research Professor of Urban Real Estate
Chair, Center for Real Estate and Urban Analysis
<http://www.chrisleinberger.com/>
<http://business.gwu.edu/about-us/research/center-for-real-estate-urban-analysis/>
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Appendix E: Permission Letter National Academies Press

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Michele Williams <michele.williams5@waldenu.edu>

Permission to use book excerpt

2 messages

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 To: permissions@nas.edu

Fri, Dec 4, 2015 at 6:05 PM

Hello Publisher,

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 Thank you in advance.

Blessings,

m

Michele A. Williams
 Public Policy and Administration
 Walden University
 302-827-3575

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Murphy, Barbara <BMurphy@nas.edu>

Tue, Dec 8, 2015 at 2:40 PM

To: Michele Williams <michele.williams5@waldenu.edu>, permissions <permissions@nas.edu>

Hi Michele,

We can grant permission for this request. I've attached a permission letter for your records. Please contact me if you have any questions or need additional assistance.

Best,

Barb

Barbara Murphy
 Assistant Manager, Sales & Marketing
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Appendix F: New Urbanism/TOD/Mixed Use Communities and Associated Real Estate Professionals/Stakeholders Research

| Reference (1st author, year) | Type of study | Methodology | Sampling (size) | Mode of data collection | Purpose | Outcome |
|------------------------------|---------------|------------------------|--|---|---|--|
| Arrington, 2002 | Qualitative | Exploratory, Narrative | 10 TOD Activities in Major U.S. Transit Systems Outside California and 12 TODs in California | Case studies, panel discussions, focus groups, and interviews | Define strategies that California could use to encourage greater implementation of TOD near major transit stations | Recommendations of 14 strategies to encourage TOD near major transit stations |
| Carnoske, 2010 | Quantitative | Comparative | National Association of Realtors 1.3 million members, 40,000 real estate agents and brokers selected randomly. (n = 495, 12.4% response rate) and developers from the National Association of Home Builders survey panel of 5000 members (n = 162) | Surveys | Obtain developer and realtor perspectives on the key factors affecting interest in TODs, the outlook for TODs following the housing crisis | TODs are increasing in demand, but developers and realtors reported significant barriers to creating these communities |
| Cervero, 2004 | Qualitative | Narrative | Developers and lenders through telephone interview and five public sector stakeholder groups surveyed. 10 case studies. All from large metropolitan areas where TOD exists. | Literature review, survey, interviews, and case studies | Comprehensive review of TOD, its impacts, successful design principles and characteristics, joint development and practice, land values, collaboration between stakeholders, and potential benefits of TOD. | TOD in the US is healthy. Partnerships advance implementation of TODs. What works and what does not work is helpful to developers to react to regulations. |

| | | | | | | |
|----------------|------------------------------|---------------------------------|---|---|--|---|
| Galloway, 2014 | Quantitative | Survey | Survey of 241 public and 202 private real estate professionals | Survey and open ended questions | To determine what promotes and hinders real estate development | Built environment infrastructure was the main driver in determining what gets built and by whom. |
| Garde, 2006 | Quantitative and Qualitative | Comparative and Survey research | Survey of stakeholders of 202 new urbanist projects (response rate of 61%) from which 11 individuals were interviewed | Survey of designers, developers and planners and semi-structured elite interviews | Evaluates the nature and promotion of new urbanism and suburban design in the US, and identifies barriers and facilitators for more new urbanism development | Strong agreement among 3 groups of respondents that new urbanism projects offer a variety of benefits. Significant barriers included existing land-use regulations, and approval and permit processes take longer than suburban designs. |
| Grant, 2009 | Qualitative | Phenomenology | Thirty-one respondents consisting of planners, development industry representatives, and municipal councilors from three cities (included both new urbanism and gated communities) from different parts of Canada | Semi-structured interviews | Explores the gap between planning theory community design and real-life development practice | Weak political commitment and market pressures impede new urbanism developers. Theory and practice are blurred. |

| | | | | | | |
|---------------|------------------------------|--|--|---|---|--|
| Grant, 2012 | Qualitative | Phenomenology | 90 respondents consisting of planners, development industry representatives, and municipal councilors from 5 municipalities in Canada | Interviews | Examine local perspectives on increased suburban density landscapes in Canada to identify illuminate conflicts between planning theory and practice | Real estate developers primarily concerned with society benefit and returns with higher densities; residents are frustrated because the consumers' expectations while living in suburbia cannot keep up. |
| Kirby, 2004 | Quantitative and Qualitative | Literature review from previous surveys and case studies | 35 secondary data sources of useable information and at one case study that used social marketing techniques for each of the three target audience (consumers, policy makers, real estate developers). | Intervention examples for three target audience groups | Identify real estate developers' behavior for developing mixed-use communities and what ordinances would better support this type of development using social marketing | Made a series of marketing recommendations for active living and the environment. |
| Levine, 2004 | Quantitative | Comparative | 676 developers randomly selected from the total Urban Land Institute database of 4183 (36.5% response rate) | Survey of US developers | To discover if land use and transportation regulations are a barrier to alternative development forms in the US. | Developers believe there is market interest in alternative development but the supply is inadequate primarily due to local government regulations. |
| Malizia, 2003 | Qualitative | Exploratory, Narrative | 29 North Carolina and 27 Virginia developers, city planners, lenders and community activists with inner-city commercial redevelopment | Workshops Focus groups Follow up telephone interviews | Describes expectations and behaviors of private sources of debt equity and actions to reduce risk. | Valuations are difficult with inherently risky urban redevelopment projects; more research is needed. |

| | | | | | | |
|-----------------------|-------------|------------------------|--|--|--|--|
| Schilling, 2008 | Qualitative | Case studies | 40 real estate practitioners and policy makers who were involved with local comprehensive planning processes | Personal interviews | Explores the competing interests and underlying political forces behind the design and passage of Wisconsin's Comprehensive Planning Law of 1999 | Lessons learned from Wisconsin can be used to address relationships of the built environment and health through the establishment of a comprehensive plan. |
| Steffel Johnson, 2008 | Qualitative | Explorative, Narrative | 304 New Urbanism projects located in 35 states + 220 previously surveyed in 2002. Response rate of 38%. | Nationwide survey to all New Urbanist developers in the US | Obtain information on how New Urbanist communities have been able to provide affordable housing | Mixed-use financing is difficult; New Urbanist developers partner with nonprofits, or take government subsidies to include affordable housing |
| Talen, 2011 | Qualitative | Explorative, Narrative | 54 developers contacted, 34 responded. Response rate of 63% | Phone interview of US developers | To suggest strategies to help promote walkable, mixed-income neighborhoods, identify barriers, and more research on benefits. | Developers frustrated by financial and regulatory barriers, and lack of access to capital for affordable housing. |

Appendix G: Original SHIFT Survey

RWJF Survey of Developers:**Definition of a Traditional Neighborhood Development (TND)**

A Traditional Neighborhood Development has most of these elements:

- a mix of uses that provide opportunities to live, work, and play with reasonable walking distances
- an integrated mix of housing types and price ranges to create a social mixture as well as land use mix
- an interconnecting street network with direct pathways between destinations (rather than a reliance on cul-de-sacs with circuitous circulation)
- a town center, formal public spaces and squares (rather than informal or "leftover" open spaces)
- pedestrian oriented design with garages to the rear of house lots and parking lots behind buildings that are set close to the street and frame sidewalk spaces

Domain: Factors influencing development decisions**Incentives and Benefits to Developing a TND****1. To what extent do the following factors encourage you to develop a TND:**

| | Strength of Encouragement | | | | | |
|---|---------------------------|---|----------|---|-------------------|------------|
| | Not at all | | Somewhat | | To a great extent | |
| Flexible Development Regulations | | | | | | |
| a. Performance Zoning | 1 | 2 | 3 | 4 | 5 | No opinion |
| <input type="checkbox"/> Density Bonuses | | | | | | |
| <input type="checkbox"/> Incentive for below market rate units | 1 | 2 | 3 | 4 | 5 | No opinion |
| <input type="checkbox"/> Meet other specified goals for land development (e.g., aesthetics, open space, parks, or buffers) | 1 | 2 | 3 | 4 | 5 | No opinion |
| b. Subject to form-based codes (<i>a zoning code designed to regulate development to achieve a specific urban form oriented towards pedestrian-friendly design</i>) | 1 | 2 | 3 | 4 | 5 | No opinion |
| c. Regulations allowing grid-streets | 1 | 2 | 3 | 4 | 5 | No opinion |

| | | | | | | |
|--|---|---|---|---|---|------------|
| d. Fast track permitting processes for more sustainable development | 1 | 2 | 3 | 4 | 5 | No opinion |
| e. Requirement to conform with LEED-ND standards | 1 | 2 | 3 | 4 | 5 | No opinion |
| Fiscal Incentives | | | | | | |
| f. The government and their lenders absorb most of the risk should a real estate venture fail | 1 | 2 | 3 | 4 | 5 | No opinion |
| g. Availability of tax incentives | 1 | 2 | 3 | 4 | 5 | No opinion |
| h. Reduced parking requirements | 1 | 2 | 3 | 4 | 5 | No opinion |
| i. Ability to build some units without on-site parking | 1 | 2 | 3 | 4 | 5 | No opinion |
| j. Car sharing programs available in area of development | 1 | 2 | 3 | 4 | 5 | No opinion |
| Potential for Increased Marketability | | | | | | |
| k. Significant amounts of new real estate investment underway in area or near site. | 1 | 2 | 3 | 4 | 5 | No opinion |
| l. Availability of location-efficient mortgages (<i>increases the amount of money homebuyers in urban areas are able to borrow by taking into account the money they save by living in "walkable" area</i>). | 1 | 2 | 3 | 4 | 5 | No opinion |
| n. Potential rent premiums for superior location/access | 1 | 2 | 3 | 4 | 5 | No opinion |
| Environmental Benefits | | | | | | |
| m. Adjacent to transit station | 1 | 2 | 3 | 4 | 5 | No opinion |
| n. Ability to market benefits related to walking, health, or reduced car use | | | | | | No opinion |
| Potential Cost Savings | | | | | | |
| o. Reduced clearing and grading costs | 1 | 2 | 3 | 4 | 5 | No opinion |
| p. Potentially reduced infrastructure costs (streets, curbs, gutters, sidewalks) | 1 | 2 | 3 | 4 | 5 | No opinion |
| q. Reduced storm water management costs | 1 | 2 | 3 | 4 | 5 | No opinion |
| r. Reduced impact fees and increased lot yields | 1 | 2 | 3 | 4 | 5 | No opinion |
| s. Increased marketability of properties | 1 | 2 | 3 | 4 | 5 | No opinion |
| t. Preserved existing vegetation | 1 | 2 | 3 | 4 | 5 | No opinion |

Reference:
[Transit-oriented Development in the United States: Experiences, Challenges...](#)

by Robert Cervero, United States Federal Transit Administration, Transit Cooperative Research Program, National Research Council (U.S.). Transportation Research Board, Transit Development Corporation - [Transportation](#) - 2004

National study of Transit Oriented Development and Joint Development, “Transit Oriented Development in the United States: Experiences, Challenges and Prospects. Transportation Research Board of the National Academies

www.builderonline.com

Barriers/Obstacles to Developing a TND

2. To what extent do the following factors prevent or discourage you from developing a TND:

| | Strength of Discouragement | | | | | No Opinion |
|--|----------------------------|---|----------|---|-------------------|------------|
| | Not at all | | Somewhat | | To a great extent | |
| Restrictive Development Regulations | | | | | | |
| Zoning/Land Use Policies | | | | | | |
| a. Affordable housing requirements | 1 | 2 | 3 | 4 | 5 | No Opinion |
| b. Automobile oriented land-use policies | 1 | 2 | 3 | 4 | 5 | No Opinion |
| Subdivision Policies | | | | | | |
| c. Regulations requiring cul-de-sacs, large lots, large setbacks, wide streets, and separation of uses | 1 | 2 | 3 | 4 | 5 | No Opinion |
| Lack of Support or Interest | | | | | | |
| d. NIMBY (not in my backyard) | 1 | 2 | 3 | 4 | 5 | No Opinion |
| e. Resistance to density | 1 | 2 | 3 | 4 | 5 | No Opinion |
| f. Lack of political support | 1 | 2 | 3 | 4 | 5 | No Opinion |
| g. Inability to overcome governmental/political hurdles | 1 | 2 | 3 | 4 | 5 | No Opinion |
| h. Inability of government agencies to work together | | | | | | No Opinion |
| i. Lack of market demand | 1 | 2 | 3 | 4 | 5 | No Opinion |
| j. Lack of lender familiarity with TNDs | 1 | 2 | 3 | 4 | 5 | No |

| | | | | | | |
|---|---|---|---|---|---|---------------|
| | | | | | | Opinion |
| k. Lender policies do not recognize or value mixed-use | | | | | | No Opinion |
| Potential Costs | | | | | | |
| l. Gas/fuel prices for construction activities | 1 | 2 | 3 | 4 | 5 | No Opinion |
| m. Cost of sidewalks and intersection treatments | 1 | 2 | 3 | 4 | 5 | No Opinion |
| n. Financing for integrated, mixed-use development (commercial and residential) | 1 | 2 | 3 | 4 | 5 | No Opinion |
| o. Inadequate transit services | 1 | 2 | 3 | 4 | 5 | No Opinion |
| p. Minimum parking requirements | 1 | 2 | 3 | 4 | 5 | No Opinion |
| Lack of Experience in TND | | | | | | |
| q. Lack of experience with TND within my company | 1 | 2 | 3 | 4 | 5 | No Opinion |
| r. Lack of experience with TND in local development community | 1 | 2 | 3 | 4 | 5 | No Opinion |

[Transit-oriented Development in the United States: Experiences, Challenges ...](#)

by Robert Cervero, United States Federal Transit Administration, Transit Cooperative Research Program, National Research Council (U.S.). Transportation Research Board, Transit Development Corporation - [Transportation](#) - 2004

3. To what extent do the following factors either discourage OR encourage you from developing a TND:

| | Strongly Discourages | | Neutral | | Strongly Encourages |
|---|-------------------------|---|---------|---|------------------------|
| a. Public sector participation in development plan | 1 | 2 | 3 | 4 | 5 |
| b. Zoning that allows or even encourages mixed-use development | 1 | 2 | 3 | 4 | 5 |
| c. Brownfield issues (abandoned or underused properties where redevelopment is complicated by actual or perceived environmental contamination). | 1 | 2 | 3 | 4 | 5 |
| | | | | | |

Domain: Policy and Role of Government

4. **How often have you encountered public policy and regulations that prohibit or impede the construction of TNDs?**
- Frequently
 - Somewhat frequently
 - Somewhat infrequently
 - Infrequently
5. **How active would you like STATE government to be in encouraging TNDs in local communities as part of growth management?**
- Very active
 - Somewhat active
 - Not sure
 - Not very active
 - Not at all active
6. **How active would you like your LOCAL government to be in encouraging TNDs in local communities as part of growth management?**
- Very active
 - Somewhat active
 - Not sure
 - Not very active
 - Not at all active

Effects of Housing Downturn

7. **How soon do you expect the housing market to begin improving?**
- Middle of 2009
 - End of 2009
 - Middle of 2010
 - After 2010
 - The housing market has been stable in my area
 - Not sure
8. **How has the poor market affected your company within the past year?**
- Dramatically reduced development
 - Reduced development
 - No impact
 - Increased development
 - Dramatically increased development

Skip to Question 9

9. Has the poor market and high gas prices:

- affected TNDs more than conventional suburban developments
- affected TNDs and conventional suburban developments about the same
- affected conventional suburban developments more than TNDs

10. Please explain how the market has affected TND?: _____

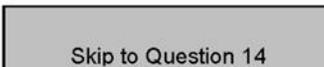
Trends in Buying and Energy

11. Clients are influenced by rising gas and oil prices in where they look to buy a home.

- Strongly Agree
- Agree
- Not Sure
- Disagree
- Strongly Disagree

12. Clients are more interested in living in a TND compared to five years ago.

- Strongly Agree
- Agree
- Not Sure
- Disagree
- Strongly Disagree



 Skip to Question 14

13. Please rate your perception of how much the following factors have increased clients' interest in living in a TND.

| | Strongly Disagree | Disagree | Not Sure | Agree | Strongly agree |
|---------------------------------------|-------------------|----------|----------|-------|----------------|
| a. Save on gas | 1 | 2 | 3 | 4 | 5 |
| b. Proximity to public transportation | 1 | 2 | 3 | 4 | 5 |
| c. Reduce commute time | 1 | 2 | 3 | 4 | 5 |
| d. Getting older and do | 1 | 2 | 3 | 4 | 5 |

| | | | | | |
|----------------------------------|---|---|---|---|---|
| not want to drive as much | | | | | |
| f. Walk to more places | 1 | 2 | 3 | 4 | 5 |

14. Clients are increasingly looking for homes with ‘green’ amenities such as sealed windows, solar and wind power to save on heating, cooling and electricity costs.

- Strongly Agree
- Agree
- Not Sure
- Disagree
- Strongly Disagree

Domain: Background

15. Please indicate your primary business occupation. Please select only one option:

- Builder
- Remodeler
- Land Developer
- Subcontractor
- Architect/Designer
- Industry Product Manufacturer/Service Provider
- Industry Dealer/Distributor/Supplier
- Other

16. How long have you been working in this field? Number of years: _____

17. In what state or U.S. territory is your company located? (Drop-down box of states.)

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- District of Columbia (D.C.)
- Florida
- Georgia
- Guam
- Hawaii
- Idaho
- Illinois
- Indiana

- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Puerto Rico
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virgin Islands
- Virginia
- Washington
- West Virginia
- Wisconsin

18. Where does your company primarily develop?

- Develop only in the area surrounding the company office: _____
- Develop only in this state
- Develop in multiple states (please list): _____

19. What is the main type of housing your company sells/develops? (Check all that apply)

- Detached single-family residences
- Townhouses, row houses, apartments, or condos of 2-3 stories
- Mix of single-family residences and townhouses, row houses, apartments or condos.
- Apartments or condos of 4-12 stories
- Apartments or condos of more than 12 stories
- Other

Domain: Experience of Firm

20. What type of development does the agency/company that you work for most commonly develop? Check all that apply.

- Build new homes in outlying areas
- Build new homes in existing, partially developed suburban areas
- Build new homes on vacant land in the central city or inner suburbs
- Develop/remodel existing homes and neighborhoods (infill development)
- Develop homes as part of TNDs

Appendix H: Permission Letter for Infrastructure 2014 Report

Michele A. Williams


18 December 2016

Urban Land Institute
2001 L Street NW, Suite 200
Washington, DC 20036
Sara.Hammerschmidt@uli.org

Hello Sara,

Thank you for clarifying the print vs electronic edition of *Infrastructure 2014*. This report proved most valuable. I am asking your further assistance by forwarding this letter to the appropriate office/person.

I am completing a dissertation at Walden University, tentatively entitled "Where One Lives Matters: A Quantitative Study Correlating Policy and Health" under the direction of my dissertation committee chaired by Dr. Anne Hacker. My dissertation examines barriers and challenges that new urbanism real estate developers face in building healthy (complete) communities. I am seeking permission to utilize the survey questions and raw data in my dissertation from the publication: *with appropriate credit given to ULI smd*

Urban Land Institute and EY. *Infrastructure 2014: Shaping the Competitive City. Methodology.*
Washington, D.C.: Urban Land Institute, 2014.

The requested permission extends to any future revisions and editions of my dissertation, including non-exclusive world rights in all languages, and to the prospective publication of my dissertation by ProQuest Information and Learning (ProQuest) through its UMI® Dissertation Publishing business. ProQuest may produce and sell copies of my dissertation on demand at my request. I may also elect to make my dissertation available for free internet download. These rights will in no way restrict republication of the material in any other form by you or by others authorized by you. ULI's signing of this letter will also confirm that ULI owns the copyright to the above-described material, or that you otherwise have sufficient rights to the material in order to grant the requested permission.

To grant this permission, please sign this letter where indicated below and return it to me at Michele.williams5@waldenu.edu. Please contact me via email or my cell, 302-827-3575, should you have any questions or need additional information. Thank you very much.

Sincerely,



Michele A. Williams

PERMISSION GRANTED FOR THE USE REQUESTED ABOVE:


Urban Land Institute
Date: 12/19/16

Appendix I: Beldon (2014) response

Walden University Mail - Infrastructure 2014: Shaping the Competitive C... <https://mail.google.com/mail/u/0/?ui=2&ik=3b7e008d52&view=pt&sea...>



Michele Williams <michele.williams5@waldenu.edu>

Infrastructure 2014: Shaping the Competitive City i

Nancy Belden <NancyBelden@brspoll.com>

Thu, Jan 5, 2017 at 2:01 PM

To: Michele Williams <michele.williams5@waldenu.edu>

Michele:

I am attaching a copy of the questionnaire, which has the marginals typed in. If you are looking at the ULI website then you have the full cross tabs. I do not have a code book available for this project.

I am glad our report may be useful for you. All the best of luck to you in your research, Nancy

From: Michele Williams [mailto:michele.williams5@waldenu.edu]

Sent: Wednesday, January 04, 2017 12:52 PM

To: Nancy Belden; Belden Russonello Strategists

[Quoted text hidden]

[Quoted text hidden]

 **q-filled.docx**
291K

Appendix J: ULI Survey Questions and Constructs

Questions asked of private sector respondents:

| | | |
|--|--|-----------------------|
| Q6. Private: What is the primary nature of your company's business activity or activities? [n=202] | Real estate development or property company | <i>Private</i> 67% |
| | Equity investor or investment manager | 14 |
| | Lender | 5 |
| | Real estate services company (management, advisory, accounting, brokerage, etc.) | 12 |
| | Other | 2 |
| | Don't know/Refused | -- |
| Q7. Private: Check the real estate sectors on which your company focuses. [n=202] [MULTIPLE RESPONSES ALLOWED] | Office | <i>Private</i> 57% |
| | Retail | 50% |
| | Residential for sale | 46% |
| | Residential for rent | 44% |
| | Land | 33% |
| | Hotel and lodging | 32% |
| | Industrial | 28% |
| | Mixed used/planned communities (VOL) | 4% |
| | Health care/municipal/public buildings (VOL) | 3% |
| | Infrastructure (VOL) | 3% |
| | Other | 3% |
| Don't know/Refused | *% | |
| Q8. Private: In what city or metropolitan area is your own work focused? (If you work in more than one city or metropolitan area, please select one you are familiar with.) [n=202] | Metropolitan areas <1 million people | <i>Private</i> 5% |
| | 1-5 million people | 31 |
| | 5-10 million people | 24 |
| | >10 million people | 21 |
| | Don't know/Refused | 19 |

Questions asked of all respondents:

| | | Total | Public | Private |
|--|-------------------------------|--------------|---------------|----------------|
| Q9. Public: Where are you located? [n=241] | United States | 87% | 90% | 85% |
| Private: Where is your firm involved in real estate activities? Check all that apply. [n=202] | Canada | 6% | 4% | 8% |
| | Other North America | 2% | * | 5% |
| | Europe | 10% | 2% | 19% |
| | South America | *% | -- | 1% |
| | Asia Pacific and/or Australia | 9% | 2% | 18% |
| | Middle East/Africa | 2% | * | 3% |
| | Don't know/Refused | 2% | 1% | 2% |

Q10: Private: In your experience, how important are the following factors in influencing where your company makes real estate investments?

- Q10a. Quality of infrastructure, including transportation, utilities, telecommunications, etc.
- Q10b. Quality of government, including transparency, accountability, and service delivery
- Q10c. Quality of schools
- Q10d. Availability of recreation and cultural attractions
- Q10e. Tax structure, including development incentives, ongoing tax burden, etc.
- Q10f. Regulations that encourage or discourage development
- Q10g. Availability of a skilled workforce
- Q10h. Consumer demand

Q11: Private: And in your experience, how important are the following infrastructure-related factors in influencing where your company makes real estate investments? [RANDOMIZED]

- Q11a. Sufficient, well-maintained roads and bridges
- Q11b. Sufficient, well-maintained bicycle infrastructure
- Q11c. Sufficient, well-maintained sidewalks and pedestrian infrastructure
- Q11d. Sufficient public transit services (bus and/or rail)
- Q11e. Sufficient parking
- Q11. Available car sharing or other new mobility services
- Q11g. Good passenger connections to other cities via airplane, train, intercity bus, etc.
- Q11h. Good freight infrastructure including ports and rail
- Q11i. High quality water and wastewater systems
- Q11j. Strong telecommunications systems and connectivity
- Q11k. Clean air
- Q11l. Reliable and affordable energy

Q11m. Sufficient parks and open space

Q11n. Quality health care facilities such as hospitals and medical providers

Q12. Private: Thinking specifically about the city or metropolitan area where your own work is most concentrated (the place you identified above), how would you rate the current quality of the following aspects of its infrastructure? [RANDOMIZE]

Q12a. Roads and bridges

Q12b. Bicycle infrastructure

Q12c. Sidewalks and pedestrian infrastructure

Q12d. Public transit services (bus and/or rail)

Q12e. Parking

Q12f. Car sharing/new mobility services

Q12g. Passenger connections to other cities via airplane, train, intercity bus, etc.

Q12h. Freight infrastructure including ports and rail

Q12i. Water quality and wastewater treatment

Q12j. Telecommunications infrastructure

Q12k. Air quality

Q12l. Energy utilities

Q12m. Parks and open space

Q12n. Health care facilities such as hospitals and medical providers

Q13. Private: Thinking again about the city or metropolitan area where your work is most concentrated, how high a priority do you think should be given to each of these infrastructure improvements over the next ten years? [RANDOMIZE]

Q13a. Improved roads and bridges

Q13b. Improved bicycle infrastructure and services (such as bike share systems)

Q13c. Improved pedestrian infrastructure

- Q13d. Improved public transit services (bus and rail)
- Q13e. Improved management of parking
- Q13f. More car sharing or other transportation services
- Q13g. Better passenger connections to other cities via airplane, train, intercity bus, etc.
- Q13h. Better freight infrastructure including ports and rail
- Q13i. Better water and wastewater infrastructure
- Q13j. Improved telecommunications infrastructure
- Q13k. Improved air quality
- Q13l. More reliable or high quality energy infrastructure
- Q13m. More parks and open space
- Q13n. Improved health care facilities
- Q14. Private: And over the next ten years, how much of an impact do you think each of the following factors will have in shaping infrastructure and real estate investments in the city or metropolitan area where your work is most concentrated? [RANDOMIZE]
- Q14a. Families with children choosing to live in your city or area
- Q14b. Growing demand for compact, walkable development
- Q14c. Climate change or extreme weather events
- Q14d. Cost and availability of energy
- Q14e. Innovative or flexible parking policies (such as easing of minimum parking requirements, shared parking, ability to flex car parking for bike parking, etc.)
- Q14f. Rise of car-sharing systems
- Q14g. Increase and advances in technology (such as real time information for bus or train arrivals, remote payment systems, real time monitoring of energy usage, etc.)
- Q14h. Use of pricing innovations to manage, operate, and pay for infrastructure (such as dynamic or variable pricing of roadways, smart meters with dynamic pricing, etc.)
- Q14i. The public's willingness or ability to pay for infrastructure

Q15. Private: How significant a role do you think each of the following will play in funding new infrastructure investments over the next ten years in the city or metropolitan area where your work is concentrated? [RANDOMIZE]

- Q15a. User charges or fees
- Q15b. Value capture strategies (for example, tax increment financing and special assessments)
- Q15c. Joint development or cooperation between developers and local government
- Q15d. Negotiated exactions (for example, development rights tied to infrastructure delivery)
- Q15e. Income taxes or property taxes
- Q15f. Contributions from federal/national government
- Q15g. Contributions from state or provincial government

Q16. Private: In the city or metropolitan area where your work is concentrated, do you think enough attention is being paid to allocating resources for long-term operations and maintenance of infrastructure? [n=202]

- Yes, it's usually an integrated part of decision making
- Some of the time
- No, the costs for operations and maintenance are usually neglected
- Don't know/Refused

Q17 (Open Ended). Private: In your opinion, what is the most important infrastructure-related barrier to increased real estate investment in the metropolitan area where your work is concentrated? [n=202]

- Transportation
 - Public transportation
 - Roads/bridges/traffic
 - Bicycle/pedestrian
 - Airport/inter-city
 - Parking
 - Other/general
- Cost
 - General, not enough funding
 - Solutions, financing suggestions
- Political
 - Lack of leadership/willingness to pay
 - Lack of long-term planning
 - Need regional collaboration
 - Sprawl/poor land use decisions/lack of density

Bad regulation/ overregulation
 High taxes/fees
 Environmental regulations
 Environmental/water
 Groundwater, sewer, water utility issues
 Water availability
 Pollution, other environmental issues
 Other
 Maintenance, aging infrastructure
 Education, schools
 Land (values, availability, readiness for development)
 Affordable housing
 Internet/connectivity
 Freight/goods movement
 Keeping up with growth
 Economy/poverty/lack of jobs
 Energy costs
 All other
 Don't know/Refused

| | Private Sector | Private Sector | Private Sector | Private Sector |
|----|------------------------------|--------------------------|-----------------------------|--|
| IV | IV1 Comprehensive Plans (21) | IV2 Zoning Policies (15) | IV3 Financing Policies (11) | DV RE Developers' choice to build (20) |
| 1 | Q10a | Q10f | Q10e | Q10b |
| 2 | Q10d | Q11a | Q14h | Q10c |
| 3 | Q10h | Q11d | Q14hi | Q10g |
| 4 | Q11b | Q11e | Q15a | Q11f |
| 5 | Q11c | Q11g | Q15b | Q11h |
| 6 | Q11i | Q12a | Q15c | Q11j |
| 7 | Q11k | Q12d | Q15c | Q11l |
| 8 | Q11m | Q12e | Q15d | Q12f |
| 9 | Q11n | Q12g | Q15e | Q12h |
| 10 | Q12b | Q13a | Q15f | Q12j |
| 11 | Q12c | Q13d | Q15g | Q12l |
| 12 | Q12i | Q13e | | Q13f |
| 13 | Q12k | Q13g | | Q13h |
| 14 | Q12m | Q14b | | Q13j |
| 15 | Q12n | Q14e | | Q13l |
| 16 | Q13b | | | Q14a |
| 17 | Q13c | | | Q14c |
| 18 | Q13i | | | Q14d |
| 19 | Q13k | | | Q14f |
| 20 | Q13m | | | Q14g |
| 21 | Q13n | | | |

Appendix K: List for Target Healthy Communities/TNDs to Identify Real Estate

Developers

| Name of Village | City | State |
|--------------------------------|-------------------|--------------|
| Gorham's Bluff | Pisgah | AL |
| Hampstead | Montgomery | AL |
| Metropolitan Gardens | Birmingham | AL |
| Mt Laurel | Birmingham | AL |
| Tannin | Orange Beach | AL |
| Providence | Huntsville | AL |
| The Preserve | Hoover | AL |
| The Waters | Pike Road | AL |
| Trussville Springs | Trussville | AL |
| Agritopia | Gilbert | AZ |
| Laurel | Yuma | AZ |
| Mercado District of Menlo Park | Tuscon | AZ |
| Har-Ber Meadows | Springdale | AK |
| Rockwater Village | North Little Rock | AK |
| Midtown | Bryant | AK |
| Village at Hendrix | Conway | AK |
| 101 San Fernando | San Jose | CA |
| Bay Meadows | San Mateo | CA |
| Britton Courts | San Francisco | CA |
| Central Petaluma | Petaluma | CA |
| Courtside Village | Santa Rosa | CA |
| Del Mar Station | Pasadena | CA |
| Doe Mill Neighborhood | Chico | CA |
| Downtown & Cannery Plans | Hayward | CA |
| Easter Hill | Richmond | CA |
| East Garrison | Monterey County | CA |
| Fruitvale Village | Oakland | CA |
| Gilroy Cannery | Gilroy | CA |
| Grand Central Square | Los Angeles | CA |
| Hercules Waterfront | Waterfront | CA |
| Liberty Station, San Diego | San Diego | CA |
| Mills Ranch | King City | CA |

| | | |
|-------------------------------|------------------|----|
| Mission Station | Pasadena | CA |
| Mountain View Downtown | Mountain View | CA |
| North Beach Place | San Francisco | CA |
| North Montclair Downtown | Montclair | CA |
| Parkview Neighborhood | Redding | CA |
| Pleasant Hill Transit Village | Contra Costa | CA |
| Richmond Transit Village | Richmond | CA |
| Rivermark | Sacramento | CA |
| Santana Row | San Jose | CA |
| Sonoma Mountain Village | Rohnert Park | CA |
| Suisun City Redevelopment | Suisun City | CA |
| Tassafaronga Village | Oakland | CA |
| Theatre District | Petaluma | CA |
| The Crossings | Mountain View | CA |
| Town Green Village, | Windsor | CA |
| Uptown District, San Diego | San Diego | CA |
| Valencia Gardens | San Francisco | CA |
| Victoria Gardens | Rancho Cucamonga | CA |
| Westgate Pasadena | Pasadena | CA |
| Yuba Central City | Yuba City | CA |
| Belmar | Lakewood | CO |
| Bradburn | Westminster | CO |
| Curtis Park | Denver | CO |
| Highlands' Garden Village | Denver | CO |
| Holiday Neighborhood | Boulder | CO |
| Iris Hollow | Boulder | CO |
| Lowell Neighborhood | Colorado Springs | CO |
| Lowry | Denver | CO |
| Pitchfork | Crested Butte | CO |
| Prospect | Longmont | CO |
| Riverfront Park | Denver | CO |
| South Main | Buena Vista | CO |
| Stapleton | Denver | CO |
| The Commons | Denver | CO |
| Three Springs | Durango | CO |
| Uptown Broadway | Boulder | CO |
| Wellington Neighborhood | Breckenridge | CO |
| Blue Back Square | West Hartford | CT |

| | | |
|---------------------------|------------------|----|
| Georgetown | Georgetown | CT |
| Harbor Point | Stamford | CT |
| Storrs Center | Mansfield | CT |
| Village of Eastlake | Wilmington | DE |
| Whitehall | Middletown | DE |
| Capitol Quarter | Washington | DC |
| Henson Ridge | Washington | DC |
| Townhomes on Capitol Hill | Washington | DC |
| Wheeler Creek Estates | Washington | DC |
| Alys Beach | Walton County | FL |
| Amelia Park | Fernandia Beach | FL |
| Aragon | Pensacola | FL |
| Avalon Park | Orlando | FL |
| Baldwin Park | Orlando | FL |
| Belmont Heights | Tampa | FL |
| Botanica | Jupiter | FL |
| Bradenton Village | Bradenton | FL |
| Brytan | Gainesville | FL |
| Cagan Crossings | Clermont | FL |
| Cape Coral | Coral Plan | FL |
| Celebration | Osceola County | FL |
| City Place | West Palm | FL |
| Clematis Street | West Palm | FL |
| Downtown Kendall | Kendall | FL |
| Downtown Doral | Doral | FL |
| Evening Rose | Tallahassee | FL |
| Fifth Avenue South | Naples | FL |
| Fort Myers Downtown | Fort Myers | FL |
| Gillespie Park Village | Sarasota | FL |
| Haile Village Center | Alachua | FL |
| Harbour Place | Tampa | FL |
| Horizon West | Orange County | FL |
| Longleaf | New Port Ritchey | FL |
| Miramar Town Center | Miramar | FL |
| Mizner Park | Boca Raton | FL |
| Naranja Urban Center | Miami | FL |
| Naranja Lakes | Miami | FL |
| Old San Carlos Boulevard | Fort Myers Beach | FL |
| Owl's Head | Freeport | FL |

| | | |
|-----------------------------|-----------------|----|
| Park Avenue | Winter Park | FL |
| Pensacola Historic District | Pensacola | FL |
| Rosemary Beach | Walton County | FL |
| Sarasota Downtown | Sarasota | FL |
| Seacrest Beach | Walton County | FL |
| Seaside | Walton County | FL |
| South Miami Hometown | Miami | FL |
| Stuart Downtown | Stuart | FL |
| Tapestry Park | Jacksonville | FL |
| Tioga | Gainesville | FL |
| Watercolor | Walton | FL |
| West Palm Beach | West Palm Beach | FL |
| Winter Springs Town Center | Winter Springs | FL |
| Winthrop Village | Brandon | FL |
| Atlantic Station | Atlanta | GA |
| Beall's Hill | Macon | GA |
| Centennial Place | Atlanta | GA |
| Clark's Grove | Covington | GA |
| Collegetown at West End | Atlanta | GA |
| Glenwood Park | Atlanta | GA |
| Inman Park Village | Atlanta | GA |
| Lakewood | Athens | GA |
| Manget, Marietta | Marietta | GA |
| Meeting Park, Marietta | Marietta | GA |
| Savannah River Landing | Savannah | GA |
| Serenbe, Palmetto | Palmetto | GA |
| Seven Norcross | Norcross | GA |
| Suwanee Town Center | Suwanee | GA |
| Vickery Village | Cummings | GA |
| Villages at Carver | Atlanta | GA |
| Woodstock Downtown | Woodstock | GA |
| Mountainside Village | Victor | ID |
| Heart of Peoria | Peoria | IL |
| Horner Neighborhood | Chicago | IL |
| Legends South | Chicago | IL |
| Uptown Normal | Normal | IL |
| St. Charles Towne Centre | St. Charles | IL |
| University Village | Chicago | IL |
| Westhaven Park | Chicago | IL |

| | | |
|------------------------------|------------------|----|
| Whistler Crossing | Riverdale | IL |
| Fall Creek Place | Indianapolis | IN |
| Lawrence Village at the Fort | Indianapolis | IN |
| Millenium Place | Muncie | IN |
| Saxony, Noblesville | Noblesville | IN |
| South Dunn Street | Bloomington | IN |
| Turner Trace, Avon | Avon | IN |
| Village of WestClay | Carmel | IN |
| Peninsula Neighborhood | Iowa City | IA |
| Prairie Trail, Ankeny | Ankeny | IA |
| Village of Ponderosa | West Des Moines | IA |
| Park Place, Leawood | Leawood | KS |
| Liberty Green | Louisille | KY |
| Park DuValle | Louisille | KY |
| Norton Commons | Prospect | KY |
| Acadia Plantation | Thibodaux | LA |
| Baton Rouge Downtown Plan | Baton Rouge | LA |
| Long Farm Village | Baton Rouge | LA |
| Olde Towne at Millcreek | Lafayette | LA |
| Provenance | Shreveport | LA |
| River Garden | New Orleans | LA |
| River Ranch | Lafayette | LA |
| Riverview | West Baton Rouge | LA |
| Settlement at Willow Grove | Baton Rouge | LA |
| Sugar Mill Pond | Youngsville | LA |
| TerraBella | Covington | LA |
| Village at Magnolia Square | Central | LA |
| Walnut Grove | Lake Charles | LA |
| Acton's Landing | Annapolis | MD |
| Albemarle Square | Baltimore | MD |
| Arts District Hyattsville | Hyattsville | MD |
| Crown | Gaithersburg | MD |
| East Baltimore | Baltimore | MD |
| East Street Extension | Frederick | MD |
| Harbor East | Baltimore | MD |
| Heritage Crossing | Crossing | MD |
| Kentlands | Gaithersburg | MD |
| King Farm | Rockville | MD |
| Lafayette Courts | Baltimore | MD |

| | | |
|-------------------------------|----------------|----|
| Lakelands | Gaithersburg | MD |
| Lexington Terrace | Baltimore | MD |
| Maple Lawn | Fulton | MD |
| Metro Centre at Owings Mills | Owings Mills | MD |
| Rockville Town Square | Rockville | MD |
| Silver Spring Downtown | Silver Spring | MD |
| Twinbrook Station | Rockville | MD |
| Westport Waterfront | Baltimore | MD |
| West Side Initiative | Baltimore | MD |
| White Flint | Bethesda | MD |
| Assembly Row | Somerville | MA |
| Churchill Homes | Holyoke | MA |
| Eastern Cambridge | Cambridge | MA |
| Harbor Point, Boston , | Boston | MA |
| Homes at Old Colony | Boston | MA |
| Mashpee Commons | Mashpee | MA |
| NorthPoint, Cambridge | Cambridge | MA |
| Arborpoint at Station Landing | Medford | MA |
| University Park, Cambridge | Cambridge | MA |
| Celadon New Town | Grand Rapids | MI |
| Cottages at Lites Woods | Pentwater | MI |
| Forester Square | Augurn Hills | MI |
| Labadie Park | Wyandotte | MI |
| Macomb Town Center | Macomb | MI |
| Mason Run | Monroe | MI |
| New Neighborhood | Empire | MI |
| Town Commons | Howell | MI |
| Woodward Place at Brush Park | Detroit | MI |
| Excelsior & Grand | St. Louis Park | MN |
| Heart of the City | Burnsville | MN |
| Heritage Park | Minneapolis | MN |
| Lino Lakes Town Center | Lino Lakes | MN |
| Riverfront/Lowertown | St. Paul | MN |
| Wacouta Commons | St. Paul | MN |
| Cotton District | Starkville | MS |
| District at Eastover | Jackson | MS |
| Lost Rabbit | Madison County | MS |
| Midtown | Hattiesburg | MS |
| Plein Air | Taylor | MS |

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|---------------------------------|----------------|----|
| The Township at Colony Park | Ridgeland | MS |
| Tradition | Biloxi | MS |
| Crescent Creek | Raytown | MO |
| New Longview | Lee's Summit | MO |
| New Town at St. Charles | St. Charles | MO |
| Northgate Village | Kansas City | MO |
| Power & Light District | Kansas City | MO |
| Station Plaza | Kirkwood | MO |
| Village of Cherry Hill | Columbia | MO |
| Ho-Chunk Village | Winnebago | NE |
| Village Gardens | Lincoln | NE |
| Symphony Park | Las Vegas | NV |
| Baldwin's Run | Camden | NJ |
| Elizabethport | Elizabeth | NJ |
| Gateway at Carteret | Carteret | NJ |
| Landings at Harborside | Perth Amboy | NJ |
| Liberty Harbor North | Jersey City | NJ |
| Livingston Town Center | Livingston | NJ |
| Oceanfront Asbury | Asbury Park | NJ |
| Washington Town Center | Robbinsville | NJ |
| Wesmont Station | Wood-Ridge | NJ |
| Albuquerque Historic District | Albuquerque | NM |
| Campus at Albuquerque High | Albuquerque | NM |
| Mesa del Sol | Albuquerque | NM |
| Oshara Village | Santa Fe | NM |
| Averne by the Sea | Arverne | NY |
| Battery Park City | Manhattan | NY |
| Wyandanch Village | Wyandanch | NY |
| Afton Village | Concord | NC |
| Antiquity | Cornelius | NC |
| Birkdale Village | Huntersville | NC |
| Cheshire | Black Mountain | NC |
| Cline Village | Conover | NC |
| Devaun Park, Calabash | Calebash | NC |
| First Ward Place Apartments | Charlotte | NC |
| Gateway Commons | Winston-Salem | NC |
| Gateway Village | Charlotte | NC |
| Hickory City Center Master Plan | Hickory | NC |
| Locust Town Center | Locust | NC |

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|-------------------------------|----------------|----|
| Sanctuary Village | Franklin | NC |
| Southern Village | Chapel Hill | NC |
| Southside | Greensboro | NC |
| Spring Brook Meadows | High Point | NC |
| St. Albans Square | Davidson | NC |
| Vermillion | Huntersville | NC |
| Viewmont Square | Hickory | NC |
| Willow Oaks | Greensboro | NC |
| Woodsong | Shallotte | NC |
| Arbor Park Village | Cleveland | OH |
| Arena District | Columbus | OH |
| City West | Cincinnati | OH |
| New Haven | Barberton | OH |
| The Jeffery | Columbus | OH |
| Shaker Town Center | Shaker Heights | OH |
| The Banks | Cincinnati | OH |
| Carlton Landing | Eufaula | OK |
| Country Club Gardens, | Tulsa | OK |
| Bella Beach | Depoe Bay | OR |
| Belmont Dairy | Portland | OR |
| Brewery Blocks | Portland | OR |
| Crescent Village | Eugene | OR |
| Fairview Village | Portland | OR |
| New Columbia | Portland | OR |
| Northwest Crossing | Bend | OR |
| Olivia Beach | Lincoln City | OR |
| Orenco Station | Portland | OR |
| Pearl District | Portland | OR |
| Pringle Creek | Salem | OR |
| River Place | Portland | OR |
| South Waterfront | Portland | OR |
| The Round | Beaverton | OR |
| Village Wiestoria | Bend | OR |
| Villebois | Wilsonville | OR |
| Wilder | Newport | OR |
| Crawford Square | Pittsburgh | PA |
| Martin Luther King, Jr. Plaza | Philadelphia | PA |
| Oak Hill | Pittsburgh | PA |
| Sadsbury Park | Chester | PA |

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|--------------------------|------------------|----|
| SouthSide Works | Pittsburgh | PA |
| Weatherstone | Chester | PA |
| Village at Valley Forge | Valley Forge | PA |
| Downcity Providence Plan | Providence | RI |
| Baxter Village | Fort Mills | SC |
| Canalside | Columbia | SC |
| Celia Saxon Neighborhood | Columbia | SC |
| Habersham | Beaufort | SC |
| Hammonds Ferry | North Augusta | SC |
| I'On | Mount Pleasant | SC |
| Market Common | Myrtle Beach | SC |
| Mixson Avenue | North Charleston | SC |
| Noisette | North Charleston | SC |
| Old Town Master Plan | Bluffton | SC |
| Patrick Square | Clemson | SC |
| Port Royal | Port Royal | SC |
| Carothers Crossing | Nashville | TN |
| Cowart Place | Chattanooga | TN |
| Lenox Village | Nashville | TN |
| Mechanicsville Commons | Knoxville | TN |
| Morgan Park Place | Nashville | TN |
| Pleasant View Village | Pleasant View | TN |
| The Gulch | Nashville | TN |
| Westhaven | Franklin | TN |
| Addison Circle | Addison | TX |
| Austin Ranch | Dallas | TX |
| Beachtown | Galveston | TX |
| Cinnamon Shore | Port Aransas | TX |
| The Domain | Austin | TX |
| Eastside Village | Plano | TX |
| Evia | Galveston | TX |
| Frisco Square | Frisco | TX |
| Home Town | N Richland Hills | TX |
| Legacy Town Center | Plano | TX |
| Mockingbird Station | Dallas | TX |
| Mueller Redevelopment | Austin | TX |
| Museum Place | Fort Worth | TX |
| Plum Creek | Kyle | TX |
| Regent Square | Houston | TX |

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|-----------------------------|----------------|----|
| Southlake Town Square | Southlake | TX |
| The Triangle | Austin | TX |
| Town Creek | New Braunfels | TX |
| Verano at City South | San Antonio | TX |
| Victoria Commons | San Antonio | TX |
| Victory Park | Dallas | TX |
| Village at Colleyville | Colleyville | TX |
| Vintage Township | Lubbock | TX |
| West Village | Dallas | TX |
| Daybreak | South Jordan | UT |
| Fairbourne Station | West Valley | UT |
| Heritage | Cedar City | UT |
| Cottonwood | Holladay | UT |
| Overlake | Tooele | UT |
| Arlington Square | Arlington | VA |
| Belmont Greene | Ashburn | VA |
| Cameron Station | Alexandria | VA |
| Carlyle/Eisenhower East | Alexandria | VA |
| City Center at Oyster Point | Newport News | VA |
| Market Common Clarendon | Arlington | VA |
| Columbia Pike | Arlington | VA |
| Daleville Town Center | Daleville | VA |
| Diggs Town | Norfolk | VA |
| East Beach | Norfolk | VA |
| Eisenhower East Plan | Alexandria | VA |
| Ladysmith Village | Ruther Glen | VA |
| Mosaic District | Fairfax | VA |
| Mt. Vernon Avenue Plan | Alexandria | VA |
| New Town | Williamsburg | VA |
| Norfolk Downtown | Norfolk | VA |
| Old Town Fairfax | Fairfax | VA |
| One Loudoun | Ashburn | VA |
| Pentagon Row | Arlington | VA |
| Potomac Yard | Alexandria | VA |
| Randolph Neighborhood | Richmond | VA |
| Rocketts Landing | Richmond | VA |
| Shirlington Village | Arlington | VA |
| Virginia Beach Town Center | Virginia Beach | VA |
| Westbury | Portsmouth | VA |

| | | |
|------------------------------|---------------|----|
| High Point | Seattle | WA |
| Issaquah Highlands | Issaquah | WA |
| Kendall Yards | Spokane | WA |
| NewHolly/Othello Station | Seattle | WA |
| Ranier Vista | Seattle | WA |
| Salishan | Tacoma | WA |
| Seabrook | Pacific Beach | WA |
| Vancouver Center | Vancouver | WA |
| Vancouver City Center Vision | Vancouver | WA |
| Beerline River Homes | Milwaukee | WI |
| Cannery Square | Sun Prarie | WI |
| Harborpark | Kenosha | WI |
| Liberty Square | Sun Prarie | WI |
| Middleton Hills | Madison | WI |
| Providence | Sun Prarie | WI |
| Smith's Crossing | Sun Prarie | WI |

Appendix L: List of Target Age Restricted Active Communities to Identify Real Estate
Developers

Table L1

List of Target Age Restricted Active Communities to Identify Real Estate Developers

| <u>Community</u> | <u>State</u> | <u>City</u> |
|---|--------------|-----------------|
| The Legacy at Cary Creek | Alabama | Auburn-Opelika |
| Galleria Woods | Alabama | Birmingham |
| Mt Laurel | Alabama | Birmingham |
| LiveOak Village | Alabama | Foley |
| The Grove | Alabama | Foley |
| Danberry at Inverness | Alabama | Hoover |
| Ross Bridge | Alabama | Hoover |
| The Preserve Alabama | Alabama | Hoover |
| Hampton Cove | Alabama | Huntsville |
| The Village of Providence | Alabama | Huntsville |
| Capstone Village | Alabama | Tuscaloosa |
| Chester Park Cooperative | Alaska | Anchorage |
| Apache East | Arizona | Apache Junction |
| Bonita Vista Resort | Arizona | Apache Junction |
| Denali Park | Arizona | Apache Junction |
| Desert Harbor | Arizona | Apache Junction |
| Dolce Vita at Superstition Mountain | Arizona | Apache Junction |
| La Casa Blanca | Arizona | Apache Junction |
| La Hacienda RV Resort | Arizona | Apache Junction |
| Lost Dutchman | Arizona | Apache Junction |
| Min-Ari | Arizona | Apache Junction |
| Montesa at Gold Canyon | Arizona | Apache Junction |
| Mountainbrook Village | Arizona | Apache Junction |
| Palmas del Sol East | Arizona | Apache Junction |
| Rancho Mirage | Arizona | Apache Junction |
| Sun Valley | Arizona | Apache Junction |
| Sunrise RV Resort | Arizona | Apache Junction |
| Superstition Views | Arizona | Apache Junction |
| Meritage Homes at Sundance | Arizona | Buckeye |
| Sun City-Festival | Arizona | Buckeye |

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| Sundance | Arizona | Buckeye |
| Verrado | Arizona | Buckeye |
| Victory at Verrado | Arizona | Buckeye |
| Fiesta RV Resort | Arizona | Bullhead City |
| Laughlin Ranch | Arizona | Bullhead City |
| The Reserve at Fox Creek | Arizona | Bullhead City |
| Ironwood Village | Arizona | Casa Grande |
| Mission Royale | Arizona | Casa Grande |
| Palm Creek Golf and RV Resort | Arizona | Casa Grande |
| Rancho Val Vista | Arizona | Casa Grande |
| Robson Ranch Arizona | Arizona | Casa Grande |
| Villa des Jardines | Arizona | Casa Grande |
| Evergreen Villa | Arizona | Chandler |
| IronOaks at Sun Lakes | Arizona | Chandler |
| Renaissance Luxury Retirement Living | Arizona | Chandler |
| Solera | Arizona | Chandler |
| SunBird | Arizona | Chandler |
| Cottonwood Village | Arizona | Cottonwood |
| Desert Gardens RV Park | Arizona | Florence |
| Sun City Anthem Merrill Ranch | Arizona | Florence |
| Trilogy at Power Ranch | Arizona | Gilbert |
| Val Vista Lakes | Arizona | Gilbert |
| Casa Del Sol Resort East | Arizona | Glendale |
| Stetson Hills | Arizona | Glendale |
| La Loma Village | Arizona | Goodyear |
| PebbleCreek | Arizona | Goodyear |
| Canoa Ranch | Arizona | Green Valley |
| Casa Paloma II | Arizona | Green Valley |
| Esperanze Estates | Arizona | Green Valley |
| Green Valley | Arizona | Green Valley |
| La Posada | Arizona | Green Valley |
| Las Campanas-Green Valley | Arizona | Green Valley |
| Legends at Santa Rita Springs | Arizona | Green Valley |
| Madera Highlands | Arizona | Green Valley |
| Quail Creek | Arizona | Green Valley |
| Sunrise Pointe | Arizona | Green Valley |
| The Links at Santa Rita Springs | Arizona | Green Valley |
| The Springs at Santa Rita | Arizona | Green Valley |
| Traditions at Desert Creek | Arizona | Green Valley |

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| CastleRock Village | Arizona | Kingman |
| Apache Wells | Arizona | Mesa |
| Brentwood West | Arizona | Mesa |
| Crescent Run | Arizona | Mesa |
| Dreamland Villa | Arizona | Mesa |
| Encore at Eastmark AZ | Arizona | Mesa |
| Hacienda de Valencia | Arizona | Mesa |
| Las Palmas | Arizona | Mesa |
| Las Palmas Grand | Arizona | Mesa |
| Leisure World Arizona | Arizona | Mesa |
| Palm Gardens | Arizona | Mesa |
| Palmas Del Sol | Arizona | Mesa |
| Silveridge | Arizona | Mesa |
| Sunland Springs Village | Arizona | Mesa |
| Sunrise Village | Arizona | Mesa |
| Towerpoint Resort | Arizona | Mesa |
| Velda Rose Estates | Arizona | Mesa |
| Venture Out RV Resort | Arizona | Mesa |
| Verde Groves | Arizona | Mesa |
| ViewPoint Golf Resort | Arizona | Mesa |
| Sun City Oro Valley | Arizona | Oro Valley |
| Vistoso Village | Arizona | Oro Valley |
| Apollo Village | Arizona | Peoria |
| Blackstone at Vistancia | Arizona | Peoria |
| Casa del sol Resort West | Arizona | Peoria |
| Immanuel Campus of Care | Arizona | Peoria |
| Trilogy at Vistancia | Arizona | Peoria |
| Ventana Lakes | Arizona | Peoria |
| Vistancia | Arizona | Peoria |
| Westbrook Village | Arizona | Peoria |
| CantaMia AZ | Arizona | Phoenix |
| Central Park Village | Arizona | Phoenix |
| Desert Skies | Arizona | Phoenix |
| Gold Canyon RV and Golf Resort | Arizona | Phoenix |
| LifeStream Living | Arizona | Phoenix |
| Paradise North | Arizona | Phoenix |
| Province | Arizona | Phoenix |
| Sagewood | Arizona | Phoenix |
| Sunrise Heights | Arizona | Phoenix |

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| Thunderbird Retirement Resort | Arizona | Phoenix |
| Whispering Palms | Arizona | Phoenix |
| Courtyards at the Gardens | Arizona | Prescott |
| Las Fuentes Resort Village | Arizona | Prescott |
| Orchard RV Resort | Arizona | Prescott |
| Pine Lakes | Arizona | Prescott |
| Talking Rock | Arizona | Prescott |
| The Gardens at Willow Creek | Arizona | Prescott |
| Victorian Estates | Arizona | Prescott |
| Victorian Estates | Arizona | Prescott |
| Rio Verde Country Club | Arizona | Rio Verde |
| Encanterra - A Trilogy Country Club | Arizona | San Tan Valley |
| Crescent Manor | Arizona | Scottsdale |
| DC Ranch | Arizona | Scottsdale |
| Heritage Village - Scottsdale Ranch | Arizona | Scottsdale |
| Maravilla Scottsdale | Arizona | Scottsdale |
| McDowell Mountain Ranch | Arizona | Scottsdale |
| Pueblo Sereno | Arizona | Scottsdale |
| Roadrunner Lake Resort | Arizona | Scottsdale |
| Tuscany at McCormick Ranch | Arizona | Scottsdale |
| Vi at Silverstone | Arizona | Scottsdale |
| Westminster Village | Arizona | Scottsdale |
| Brookfield at Verde Santa Fe | Arizona | Sedona |
| Sedona Shadows | Arizona | Sedona |
| Verde Santa Fe | Arizona | Sedona |
| Vista View Resort | Arizona | Sierra Vista |
| Winterhaven | Arizona | Sierra Vista |
| Grandview Terrace | Arizona | Sun City |
| Sun City | Arizona | Sun City |
| Sun City West | Arizona | Sun City |
| The Fountains at Sun City Apartments | Arizona | Sun City |
| Sun Lakes Arizona | Arizona | Sun Lakes |
| Arizona Traditions | Arizona | Surprise |
| Marley Park | Arizona | Surprise |
| Pueblo El Mirage | Arizona | Surprise |
| Sun Village | Arizona | Surprise |
| The Colonnade | Arizona | Surprise |
| Friendship Village Tempe | Arizona | Tempe |
| The Meadows | Arizona | Tempe |

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|---|------------|----------------|
| The Barrio de Tubac | Arizona | Tubac |
| Academy Village | Arizona | Tucson |
| Casa Del Oro Norte | Arizona | Tucson |
| Copper Crest | Arizona | Tucson |
| Country Club of La Cholla | Arizona | Tucson |
| Desert Pueblo Mobile Home Park | Arizona | Tucson |
| Fairview Manor | Arizona | Tucson |
| Rincon Country East | Arizona | Tucson |
| Rincon Country West RV Resort | Arizona | Tucson |
| SaddleBrooke | Arizona | Tucson |
| Splendido at Rancho Vistoso | Arizona | Tucson |
| The Highlands at Dove Mountain | Arizona | Tucson |
| Trails West Tucson | Arizona | Tucson |
| Tucson Meadows | Arizona | Tucson |
| Villa Hermosa | Arizona | Tucson |
| Coyote Creek | Arizona | Vail |
| Westpark | Arizona | Wickenburg |
| The Palms RV Resort | Arizona | Yuma |
| The Homes of Stonebrook Cove | Arkansas | Conway |
| Holiday Island AR | Arkansas | Eureka Springs |
| Butterfield Trail Village | Arkansas | Fayetteville |
| Forest Lakes Garden Homes | Arkansas | Hot Springs |
| FountainGlen at Jacaranda | California | Anaheim |
| Friendly Village La Habra | California | Anaheim |
| Trilogy at Glen Ivy | California | Anaheim |
| Walnut Village Retirement Community | California | Anaheim |
| Sun City Apple Valley | California | Apple Valley |
| Victor Villa | California | Apple Valley |
| Auburn Ravine Terrace | California | Auburn |
| Lake of The Pines | California | Auburn |
| Brighton Parks | California | Bakersfield |
| Solera at Kern Canyon | California | Bakersfield |
| Village Green | California | Bakersfield |
| Four Seasons at Beaumont | California | Banning |
| Highland Springs Country Club | California | Banning |
| Plantation on the Lake | California | Banning |
| Solera at Oak Valley Greens | California | Banning |
| Sun Lakes Country Club | California | Banning |
| Ashby Village | California | Berkeley |

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| Berkeley Town House Cooperative | California | Berkeley |
| Grand Lake Gardens | California | Berkeley |
| Discovery Bay | California | Brentwood |
| Summerset Orchards | California | Brentwood |
| Trilogy at the Vineyards | California | Brentwood |
| Burbank Senior Artists Colony | California | Burbank |
| Friendly Village Simi | California | Camarillo |
| Leisure Village | California | Camarillo |
| Mission Oaks | California | Camarillo |
| Vallecito | California | Camarillo |
| Sycamore Glen Retirement Center | California | Chico |
| Claremont Manor Retirement Community | California | Claremont |
| Pilgrim Place | California | Claremont |
| Sunny View Retirement Community | California | Cupertino |
| Glenbrooke by Del Webb | California | Elk Grove |
| Eskaton Village | California | Grass Valley |
| Wolf Creek Lodge | California | Grass Valley |
| Clover Springs | California | Healdsburg |
| Four Seasons at Hemet | California | Hemet |
| Golden Village Palms | California | Hemet |
| Maravilla Estates | California | Hemet |
| Perris Station | California | Hemet |
| Royal Holiday | California | Hemet |
| Ryland Oasis | California | Hemet |
| Solera at Diamond Valley Del Webb | California | Hemet |
| The Colony | California | Hemet |
| The Oasis | California | Hemet |
| Four Seasons at Terra Lago | California | Indio |
| Heritage Palms Golf Club | California | Indio |
| Portola Country Club | California | Indio |
| Sun City Shadow Hills by Del Webb | California | Indio |
| Trilogy at The Polo Club | California | Indio |
| Azulon at Mesa Verde | California | Irvine |
| Jackson View Active Adult Community | California | Jackson |
| Casa de Manana | California | La Jolla |
| Chateau LaJolla Inn | California | La Jolla |
| The White Sands at La Jolla | California | La Jolla |
| Vi at La Jolla Village | California | La Jolla |
| El Toro Mobile Estates | California | Laguna Woods |

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| Laguna Woods Village | California | Laguna Woods |
| The Covington | California | Laguna Woods |
| The Willows Community | California | Laguna Woods |
| Heritage Estates | California | Livermore |
| Palos Verdes Shores | California | Long Beach |
| Ramona Park Senior Apartments | California | Long Beach |
| The Canterbury | California | Long Beach |
| Belcaro | California | Los Angeles |
| Friendly Valley | California | Los Angeles |
| Kingsley Manor Retirement Community | California | Los Angeles |
| Mountview | California | Los Angeles |
| Nantucket Creek | California | Los Angeles |
| NOHO Senior Artists Community | California | Los Angeles |
| Primera Terra | California | Los Angeles |
| Shady Grove at Dos Lagos | California | Los Angeles |
| Teramachi Homes | California | Los Angeles |
| The Palms | California | Los Angeles |
| Coralwood | California | Manteca |
| Woodbridge by Del Webb | California | Manteca |
| Yosemite Gardens | California | Manteca |
| Casta del Sol | California | Mission Viejo |
| Gavilan | California | Mission Viejo |
| Palmia | California | Mission Viejo |
| Napa Valley Community | California | Napa |
| Blacklake Village | California | Nipomo |
| Costa Serena | California | Oceanside |
| Emerald Lake Village | California | Oceanside |
| Ocean Hills Country Club | California | Oceanside |
| Oceana | California | Oceanside |
| Pacifica | California | Oceanside |
| Pilgrim Creek Estates | California | Oceanside |
| Villa Trieste | California | Oceanside |
| Seabridge | California | Oxnard |
| Palm Desert Greens Country Club | California | Palm Desert |
| Sun City Palm Desert | California | Palm Desert |
| Villa Portofino-Palm Desert | California | Palm Desert |
| 4 Seasons at Palm Springs | California | Palm Springs |
| Avant at Escena Palm Springs | California | Palm Springs |
| Caliente Springs | California | Palm Springs |

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| Date Palm Country Club | California | Palm Springs |
| Desert Shadows | California | Palm Springs |
| Royal Palms California | California | Palm Springs |
| Sands RV and Golf Resort | California | Palm Springs |
| Sky Valley Resorts | California | Palm Springs |
| The Fountains at The Carlotta | California | Palm Springs |
| Trilogy at La Quinta | California | Palm Springs |
| Watercolors | California | Palm Springs |
| MonteCedro | California | Pasadena |
| Villa Gardens Retirement Community | California | Pasadena |
| The Village at Ironwood | California | Pleasanton |
| The Vineyard | California | Redding |
| Tuscany Villas | California | Redding |
| Trilogy at Rio Vista | California | Rio Vista |
| Alta Laguna | California | Riverside |
| Altavita | California | Riverside |
| Cambria at Riverwalk | California | Riverside |
| Leisure Pointe | California | Riverside |
| Loma Linda Springs | California | Riverside |
| Plaza at Sierra | California | Riverside |
| Riverside Meadows | California | Riverside |
| Victoria Springs | California | Riverside |
| Sierra Regency | California | Roseville |
| Sun City Lincoln Hills | California | Roseville |
| Sun City Roseville | California | Roseville |
| The Club by Del Webb | California | Roseville |
| Arcade Creek Manor | California | Sacramento |
| Four Seasons Westshore | California | Sacramento |
| Saddle Creek Resort | California | Sacramento |
| Springfield at Whitney Oaks | California | Sacramento |
| Winding Commons | California | Sacramento |
| Cotton Point Senior Apartments | California | San Clemente |
| Rancho Alipaz | California | San Clemente |
| San Clemente Villas by the Sea | California | San Clemente |
| Shorecliffs Terrace | California | San Clemente |
| Talega Gallery | California | San Clemente |
| The Fountains at Sea Bluffs | California | San Clemente |
| Carlsbad By The Sea Retirement Community | California | San Diego |
| Casa de las Campanas | California | San Diego |

| | | |
|---|------------|-----------------|
| Casa de Manana Retirement Community | California | San Diego |
| Chateau Lake San Marcos | California | San Diego |
| Fredericka Manor Retirement Community | California | San Diego |
| High Country Villas | California | San Diego |
| Oaks North | California | San Diego |
| Pacific Regent La Jolla | California | San Diego |
| Paradise Village | California | San Diego |
| Rancho Mesa | California | San Diego |
| Rancho Monserate | California | San Diego |
| Rio Bend RV and Golf Resort | California | San Diego |
| Santaluz | California | San Diego |
| Seven Oaks | California | San Diego |
| Wesley Palms Retirement Community | California | San Diego |
| The Villages Golf and Country Club | California | San Jose |
| Valley Village | California | San Jose |
| Versailles | California | San Jose |
| Las Brisas | California | San Luis Obispo |
| Sea Oaks | California | San Luis Obispo |
| Sunrise Terrace | California | San Luis Obispo |
| Trilogy Central Coast | California | San Luis Obispo |
| Smith Ranch Homes | California | San Rafael |
| Hummel Village | California | Santa Barbara |
| Vista Del Monte Retirement Community | California | Santa Barbara |
| Oakmont Village | California | Santa Rosa |
| The Orchard | California | Santa Rosa |
| Huntington Landmark | California | Seal Beach |
| Leisure World Seal Beach | California | Seal Beach |
| Temelec | California | Sonoma |
| Parkview Court | California | Torrance |
| Sol y Mar | California | Torrance |
| Rancho Vista | California | Vista |
| Shadowridge | California | Vista |
| Byron Park | California | Walnut Creek |
| Heritage Pointe | California | Walnut Creek |
| Rossmoor Walnut Creek | California | Walnut Creek |
| Heather Gardens | Colorado | Aurora |
| Heritage Eagle Bend | Colorado | Aurora |
| Villas at Great Plains Park | Colorado | Aurora |
| Carillon at Boulder Creek | Colorado | Boulder |

| | | |
|---|----------|------------------|
| Hover Place | Colorado | Boulder |
| Latitude at Vista Ridge | Colorado | Boulder |
| Silver Sage Village | Colorado | Boulder |
| Highland Trail | Colorado | Broomfield |
| Skystone | Colorado | Broomfield |
| The Avenues Crofton Park | Colorado | Broomfield |
| Cheyenne Place | Colorado | Colorado Springs |
| La Cresta Mobile Estates | Colorado | Colorado Springs |
| MacKenzie Place at Colorado Springs | Colorado | Colorado Springs |
| Stonebridge | Colorado | Colorado Springs |
| Sunridge | Colorado | Colorado Springs |
| Wolf Ranch | Colorado | Colorado Springs |
| 1375 High Street | Colorado | Denver |
| Anthem Ranch | Colorado | Denver |
| Bay Bridge Condominiums | Colorado | Denver |
| Bear Creek Village | Colorado | Denver |
| Cottage Hill Senior Apartments | Colorado | Denver |
| Fairway Villas at Green Valley Ranch | Colorado | Denver |
| Heritage at Todd Creek | Colorado | Denver |
| Highlands Village Garden | Colorado | Denver |
| Holiday Hills Village | Colorado | Denver |
| The Grove at Stapleton | Colorado | Denver |
| Vi at Highlands Ranch | Colorado | Denver |
| Windsor Gardens | Colorado | Denver |
| Three Springs | Colorado | Durango |
| Rocky Mountain Village | Colorado | Evergreen |
| MacKenzie Place at Fort Collins | Colorado | Fort Collins |
| Skyline | Colorado | Fort Collins |
| Sunflower | Colorado | Fort Collins |
| Village at Country Creek | Colorado | Fruita |
| Parkview Villas at Golden | Colorado | Golden |
| Picture Ranch MHC | Colorado | Grand Junction |
| The Cottages of Hilltop Community Resources | Colorado | Grand Junction |
| Pelican Lake Ranch | Colorado | Greeley |
| West T-Bone Ranch | Colorado | Greeley |
| Gleneagles Village | Colorado | Highlands Ranch |
| Verona | Colorado | Highlands Ranch |
| Concordia on the Lake | Colorado | Littleton |
| GrandView of Roxborough | Colorado | Littleton |

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| The Ridge at Stony Creek | Colorado | Littleton |
| MacKenzie Place at Ridgeway | Colorado | Lone Tree |
| Balfour Senior Living | Colorado | Louisville |
| Mirasol Senior Living Community | Colorado | Loveland |
| Water Valley | Colorado | Windsor |
| Chatfield Farms | Connecticut | Beacon Falls |
| Pond Spring Village | Connecticut | Beacon Falls |
| Theresa A. Rook Retirement Community | Connecticut | Beacon Falls |
| Beckley Farms | Connecticut | Berlin |
| North Woods of Colchester | Connecticut | Colchester |
| Village at Colchester | Connecticut | Colchester |
| Lakeview by JENSEN communities | Connecticut | Danbury |
| Newbury Village | Connecticut | Danbury |
| Rivington | Connecticut | Danbury |
| The Summit at Bethel | Connecticut | Danbury |
| Meetinghouse Village of Durham | Connecticut | Durham |
| Stagecoach Farms | Connecticut | Durham |
| Watermark at 3030 Park | Connecticut | Fairfield |
| Seabury | Connecticut | Farmington |
| The Village at Buckingham | Connecticut | Farmington |
| Thames Edge at Fairview | Connecticut | Groton |
| The Gables at Guilford | Connecticut | Guilford |
| Beechwood by JENSEN communities | Connecticut | Killingworth |
| Chester Village West | Connecticut | Killingworth |
| Madison Landing | Connecticut | Madison |
| The Hammocks on Long Island Sound | Connecticut | Madison |
| The Hearth at Tuxis Pond | Connecticut | Madison |
| Bella Vista New Haven | Connecticut | New Haven |
| Seacrest Retirement Center | Connecticut | New Haven |
| Whitney Center | Connecticut | New Haven |
| Tall Oaks on the River | Connecticut | New Milford |
| Liberty at Newtown | Connecticut | Newtown |
| The Woods at Newtown | Connecticut | Newtown |
| Chapman Woods | Connecticut | Niantic |
| Whiting Farms Commons | Connecticut | Niantic |
| Eden Harbour | Connecticut | Old Saybrook |
| Yankee Village by JENSEN communities | Connecticut | Old Saybrook |
| Fieldstone Village | Connecticut | Orange |
| Fairview at Oxford Greens by Del Webb | Connecticut | Oxford CT |

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| Meadow Brook Estates | Connecticut | Oxford CT |
| RiverBend Estates | Connecticut | Oxford CT |
| Oak Grove by JENSEN communities | Connecticut | Plainville |
| The Powder Forest | Connecticut | Simsbury |
| Pomperaug Woods | Connecticut | Southbury |
| The Hearth at Southbury | Connecticut | Southbury |
| The Watermark at East Hill | Connecticut | Southbury |
| Cedar Springs by JENSEN communities | Connecticut | Southington |
| Forest Hill by JENSEN communities | Connecticut | Southington |
| Three Gardens by JENSEN communities | Connecticut | Southington |
| Edgehill Senior Living | Connecticut | Stamford |
| Old Mystic Estates at Stonington | Connecticut | Stonington |
| Rolling Hills by JENSEN communities | Connecticut | Storrs |
| Maple Oak Reserve | Connecticut | Stratford |
| Oronoque Village | Connecticut | Stratford |
| Greendale Village | Connecticut | Suffield |
| Lakeside by JENSEN communities | Connecticut | Terryville |
| Hillcrest by JENSEN communities | Connecticut | Uncasville |
| Laurel Heights by JENSEN communities | Connecticut | Uncasville |
| Marina Cove by JENSEN communities | Connecticut | Uncasville |
| Cheshire Crossing | Connecticut | Wallingford |
| Masonicare at Ashlar Village | Connecticut | Wallingford |
| Regency at Prospect | Connecticut | Wallingford |
| Grove Beach by JENSEN communities | Connecticut | Westbrook |
| New England Village by JENSEN communities | Connecticut | Westbrook |
| Cedar Bay Condominiums | Delaware | Bethany Beach |
| Heritage Shores | Delaware | Bridgeville |
| Barclay Farms | Delaware | Dover |
| Longacre Village | Delaware | Dover |
| Noble's Pond | Delaware | Dover |
| High Point Park | Delaware | Frederica |
| Bay Crossing | Delaware | Lewes |
| Heritage Creek | Delaware | Lewes |
| Senators | Delaware | Lewes |
| Sussex West | Delaware | Lewes |
| Village of Cinderberry | Delaware | Lewes |
| Champions Club at Jonathans Landing | Delaware | Magnolia |
| Southern Meadow | Delaware | Magnolia |
| Four Seasons at Silver Maple | Delaware | Middletown |

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| Spring Arbor | Delaware | Middletown |
| The Ponds at Bayberry South | Delaware | Middletown |
| Fork Landing | Delaware | Milford |
| Independence Millsboro | Delaware | Millsboro |
| Plantation Lakes | Delaware | Millsboro |
| The Peninsula on The Indian River | Delaware | Millsboro |
| Cedar Valley | Delaware | Rehoboth Beach |
| Peninsula at Indian River Bay | Delaware | Rehoboth Beach |
| Bon Ayre | Delaware | Smyrna |
| Spring Meadow | Delaware | Smyrna |
| The Villages of Eastridge | Delaware | Smyrna |
| Willowwood | Delaware | Smyrna |
| Legacy at Odessa National | Delaware | Townsend |
| Courtyards at Brandywine | Delaware | Wilmington-DE |
| Milltown Village | Delaware | Wilmington-DE |
| Rockland Place | Delaware | Wilmington-DE |
| Lake Forest Park | Florida | Abacoa |
| Lake Forest Park | Florida | Abacoa |
| Somerset | Florida | Abacoa |
| Somerset | Florida | Abacoa |
| Windsor Park | Florida | Abacoa |
| Windsor Park | Florida | Abacoa |
| Lake Blue | Florida | Auburndale |
| Lake Juliana Landings | Florida | Auburndale |
| The Hamptons | Florida | Auburndale |
| Westside Ridge | Florida | Auburndale |
| Del Webb Naples Community | Florida | Ave Maria |
| Middlebrooke | Florida | Ave Maria |
| Floral Lakes | Florida | Bartow |
| Boca del Mar | Florida | Boca Raton |
| Century Village in Boca Raton | Florida | Boca Raton |
| St. Andrews Estates | Florida | Boca Raton |
| Carousel Cove | Florida | Bonita Springs |
| The Brooks | Florida | Bonita Springs |
| The Terraces at Bonita Springs | Florida | Bonita Springs |
| Canyon Trails | Florida | Boynton Beach |
| Cascade Lakes | Florida | Boynton Beach |
| Coral Lakes | Florida | Boynton Beach |
| Indian Springs Country Club | Florida | Boynton Beach |

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| Maralago Cay | Florida | Boynton Beach |
| Palm Isles | Florida | Boynton Beach |
| Ponte Vecchio | Florida | Boynton Beach |
| The Cascades at Boynton Beach, Florida | Florida | Boynton Beach |
| The Club at Indian Lakes | Florida | Boynton Beach |
| Tivoli Lakes | Florida | Boynton Beach |
| Valencia Pointe | Florida | Boynton Beach |
| Valencia Reserve | Florida | Boynton Beach |
| Valencia Shores | Florida | Boynton Beach |
| Venetian Isles Boynton Beach | Florida | Boynton Beach |
| Villaggio | Florida | Boynton Beach |
| Bayshore Windmill Village | Florida | Bradenton |
| Bradenton Tropical Palms | Florida | Bradenton |
| Central Park at Lakewood Ranch | Florida | Bradenton |
| Chateau Village | Florida | Bradenton |
| Discovery Village at Sarasota Bay | Florida | Bradenton |
| Harbour Isle | Florida | Bradenton |
| Hawaiian Village | Florida | Bradenton |
| Pleasant Lake | Florida | Bradenton |
| Terra Ceia Manor | Florida | Bradenton |
| Waterside Club | Florida | Bradenton |
| Windmill Manor | Florida | Bradenton |
| Gulf Coast Village | Florida | Cape Coral |
| Chiefland Astronomy Village | Florida | Chiefland |
| Bay Aristocrat Village | Florida | Clearwater |
| Doral Village | Florida | Clearwater |
| Down Yonder | Florida | Clearwater |
| Shady Lane Oaks | Florida | Clearwater |
| Shangri La | Florida | Clearwater |
| The Barrington | Florida | Clearwater |
| Esplanade at Highland Ranch | Florida | Clermont |
| Heritage Hills | Florida | Clermont |
| Kings Ridge | Florida | Clermont |
| Outdoor Resorts of Orlando | Florida | Clermont |
| Summit Greens | Florida | Clermont |
| Timber Village | Florida | Clermont |
| Woodlands at Church Lake | Florida | Clermont |
| Lost Lakes | Florida | Cocoa |
| Wynmoor Village | Florida | Coconut Creek |

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| Ridge Manor Mobile Home Park | Florida | Dade City |
| Southfork Mobile Home Community | Florida | Dade City |
| The Highlands at Scotland Yard | Florida | Dade City |
| Del Webb at Orlando | Florida | Davenport |
| High Vista in Ridgewood Lakes | Florida | Davenport |
| Bear Creek | Florida | Daytona Beach |
| Carriage Cove | Florida | Daytona Beach |
| Colonial Colony South | Florida | Daytona Beach |
| Crane Lakes | Florida | Daytona Beach |
| Holly Forest | Florida | Daytona Beach |
| Huntington Village | Florida | Daytona Beach |
| Lakeview Estates | Florida | Daytona Beach |
| Maplewood Estates | Florida | Daytona Beach |
| Sterling Court | Florida | Daytona Beach |
| Kings Lake | Florida | Debary |
| Century Village | Florida | Deerfield Beach |
| Pine Tree Park | Florida | Deerfield Beach |
| Cresswind Victoria Gardens | Florida | DeLand |
| Victoria Park | Florida | DeLand |
| Abbey Delray South | Florida | Delray Beach |
| Four Seasons at Delray Beach | Florida | Delray Beach |
| Harbour's Edge | Florida | Delray Beach |
| Huntington Lakes | Florida | Delray Beach |
| Huntington Pointe | Florida | Delray Beach |
| Kings Point Delray | Florida | Delray Beach |
| Lakes of Delray | Florida | Delray Beach |
| Pine Ridge of Delray | Florida | Delray Beach |
| Valencia Falls | Florida | Delray Beach |
| Villaggio Reserve | Florida | Delray Beach |
| Lake Haven | Florida | Dunedin |
| Spruce Creek Preserve | Florida | Dunnellon |
| Eastern Shores | Florida | Edgewater |
| Edgewater Landing | Florida | Edgewater |
| Hacienda Del Rio | Florida | Edgewater |
| Magnolia Village | Florida | Edgewater |
| The Cascades at Estero | Florida | Estero |
| Amelia Walk | Florida | Fernandina Beach |
| Bulow Plantation | Florida | Flagler Beach |
| Plantation Oaks | Florida | Flagler Beach |

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| Forest Trace | Florida | Fort Lauderdale |
| Park City West | Florida | Fort Lauderdale |
| Aqua Isles Mobile Home and RV Retirement Community | Florida | Fort Myers |
| Cinnamon Cove | Florida | Fort Myers |
| Cinnamon Cove | Florida | Fort Myers |
| Cypress Cove | Florida | Fort Myers |
| Del Tura Country Club | Florida | Fort Myers |
| Heritage Cove | Florida | Fort Myers |
| Horizon Village Co-op | Florida | Fort Myers |
| Lazy Days Village | Florida | Fort Myers |
| Orange Harbor Co-Op | Florida | Fort Myers |
| Pine Lakes Country Club | Florida | Fort Myers |
| River Hall | Florida | Fort Myers |
| Serendipity | Florida | Fort Myers |
| Seven Lakes Golf and Tennis Community | Florida | Fort Myers |
| Shell Point | Florida | Fort Myers |
| Six Lakes Country Club | Florida | Fort Myers |
| Tamiami Village | Florida | Fort Myers |
| Tropicana Co-Op | Florida | Fort Myers |
| Sandhill Shores | Florida | Fort Pierce |
| Oak Hammock | Florida | Gainesville |
| The Village | Florida | Gainesville |
| Town Shores | Florida | Gulfport |
| Lake Hammock Village | Florida | Haines City |
| Lake Henry Estates | Florida | Haines City |
| Plantation Landings | Florida | Haines City |
| Royal Palm Village | Florida | Haines City |
| Village of Casa del Sol | Florida | Haines City |
| Forest View | Florida | Homosassa |
| Stonebrook | Florida | Homosassa |
| Walden Woods | Florida | Homosassa |
| Walden Woods South | Florida | Homosassa |
| Cecil Pines | Florida | Jacksonville |
| Eagle Harbor | Florida | Jacksonville |
| Eagle Landing at Oakleaf Plantation | Florida | Jacksonville |
| Fleet Landing | Florida | Jacksonville |
| Penney Retirement Community | Florida | Jacksonville |
| Sweetwater by Del Webb | Florida | Jacksonville |

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| Westminster Woods Julington | Florida | Jacksonville |
| Ocean Breeze | Florida | Jensen Beach |
| Pinelake Village | Florida | Jensen Beach |
| The Waterford | Florida | Juno Beach |
| Abacoa | Florida | Jupiter |
| Riverwalk Pointe at Mangrove Bay | Florida | Jupiter |
| Harmony | Florida | Kissimmee |
| Solivita | Florida | Kissimmee |
| Solivita Basic | Florida | Kissimmee |
| Whispering Pines Community | Florida | Kissimmee |
| Lexington Park | Florida | Lady Lake |
| Water Oak Country Club Estates | Florida | Lady Lake |
| Cypress Greens | Florida | Lake Alfred |
| Kings Pointe | Florida | Lake Alfred |
| Leisure Homes | Florida | Lake Alfred |
| Heathrow Country Club | Florida | Lake Mary |
| Lake Ashton | Florida | Lake Wales |
| Nalcrest | Florida | Lake Wales |
| Ariana Village | Florida | Lakeland |
| Beacon Terrace | Florida | Lakeland |
| Cypress Lakes | Florida | Lakeland |
| Lake Pointe Village | Florida | Lakeland |
| Lakeland Junction | Florida | Lakeland |
| Mas Verde Estates | Florida | Lakeland |
| Mount Olive Shores | Florida | Lakeland |
| Mount Olive Shores North | Florida | Lakeland |
| Pine Ridge | Florida | Lakeland |
| Woodbrook Estates | Florida | Lakeland |
| Lakewood Ranch Community | Florida | Lakewood Ranch |
| Arlington Ridge | Florida | Leesburg-FL |
| Grand Island Resort | Florida | Leesburg-FL |
| Hawthorne at Leesburg | Florida | Leesburg-FL |
| Lake Griffin Harbor | Florida | Leesburg-FL |
| Lakes at Leesburg | Florida | Leesburg-FL |
| Legacy of Leesburg | Florida | Leesburg-FL |
| Mid Florida Lakes | Florida | Leesburg-FL |
| Pennbrooke Fairways | Florida | Leesburg-FL |
| Royal Highlands | Florida | Leesburg-FL |
| Sunlake Estates | Florida | Leesburg-FL |

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| Village on the Green | Florida | Longwood |
| Alamanda Key | Florida | Melbourne |
| Glenbrooke at Palm Bay | Florida | Melbourne |
| Heritage Isle | Florida | Melbourne |
| Heritage Isle Manors | Florida | Melbourne |
| Indian River Colony Club | Florida | Melbourne |
| Lakes of Melbourne | Florida | Melbourne |
| Lakes of Melbourne | Florida | Melbourne |
| Lamplighter Village | Florida | Melbourne |
| Pine Creek | Florida | Melbourne |
| Sonata at Melbourne | Florida | Melbourne |
| Viera | Florida | Melbourne |
| Viera | Florida | Melbourne |
| Coastal Senior Living - Banana River Villas | Florida | Merritt Island |
| Courtenay Springs Village | Florida | Merritt Island |
| Island Lakes | Florida | Merritt Island |
| Island Village | Florida | Merritt Island |
| The Palace at Coral Gables | Florida | Miami |
| The Palace Suites | Florida | Miami |
| Lakes of Mount Dora | Florida | Mount Dora |
| Southernaire | Florida | Mount Dora |
| Waterman Village | Florida | Mount Dora |
| Cedar Hammock | Florida | Naples |
| Lake San Marino | Florida | Naples |
| Landmark Naples | Florida | Naples |
| Marco Shores Estates | Florida | Naples |
| Moorings Park | Florida | Naples |
| Naples Estates N.E.H.A. | Florida | Naples |
| Pelican Marsh | Florida | Naples |
| Regatta Landing at Windstar | Florida | Naples |
| Sandlewood Village | Florida | Naples |
| Tall Oaks | Florida | Naples |
| The Isles of Collier Preserve | Florida | Naples |
| VeronaWalk | Florida | Naples |
| VI at Bentley Village | Florida | Naples |
| Windjammer Village | Florida | Naples |
| Country Place | Florida | New Port Richey |
| Cross Creek at Summertree | Florida | New Port Richey |
| Hacienda Village | Florida | New Port Richey |

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| Timber Greens | Florida | New Port Richey |
| Quail Hollow | Florida | New Smyrna Beach |
| Coastal Oaks at Nocatee | Florida | Nocatee |
| Harbor Cove Waterfront Resident-Owned Community | Florida | North Port |
| Fairfield Village | Florida | Ocala, FL |
| Foxwood Farms | Florida | Ocala, FL |
| Golden Pond Village | Florida | Ocala, FL |
| Oak Run | Florida | Ocala, FL |
| Ocala Palms | Florida | Ocala, FL |
| On Top of the World Ocala | Florida | Ocala, FL |
| Rolling Greens | Florida | Ocala, FL |
| Saddle Oak Club | Florida | Ocala, FL |
| Spring Lake Village | Florida | Ocala, FL |
| Spruce Creek by Del Webb | Florida | Ocala, FL |
| Stone Creek Del Webb | Florida | Ocala, FL |
| Stonecrest | Florida | Ocala, FL |
| SummerGlen | Florida | Ocala, FL |
| Sweetwater Oaks | Florida | Ocala, FL |
| The Falls of Ocala | Florida | Ocala, FL |
| The Villas at Spanish Oaks | Florida | Ocala, FL |
| Orange Tree Village | Florida | Orange City |
| Villa Grande on Saxon | Florida | Orange City |
| Fleming Island Plantation | Florida | Orange Park |
| Avalon Park | Florida | Orlando |
| BellaTrae at Championsgate | Florida | Orlando |
| Gulfstream Harbor | Florida | Orlando |
| Hidden Valley | Florida | Orlando |
| Lakeshore Landings | Florida | Orlando |
| Oakmonte Village | Florida | Orlando |
| Silver Star | Florida | Orlando |
| Starlight Ranch | Florida | Orlando |
| Swan Lake Estates | Florida | Orlando |
| Trilogy Orlando | Florida | Orlando |
| Village Walk at Lake Nona | Florida | Orlando |
| Baywinds | Florida | Palm Beach |
| Century Village-West Palm Beach | Florida | Palm Beach |
| Cypress Trail | Florida | Palm Beach |
| Devonshire at PGA National | Florida | Palm Beach |

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| La Posada at Palm Beach Gardens | Florida | Palm Beach |
| Palm Lake Co-Op | Florida | Palm Beach |
| RiverWalk Palm Beach | Florida | Palm Beach |
| Grand Landings | Florida | Palm Coast |
| Colony Cove | Florida | Palmetto |
| Country Lakes Village | Florida | Palmetto |
| Fiesta Grove | Florida | Palmetto |
| Cedar Woods at Watercolor | Florida | Panama City |
| Century Village in Pembroke Pines | Florida | Pembroke Pines |
| Hollybrook Golf and Tennis Club | Florida | Pembroke Pines |
| Carrington | Florida | Pensacola |
| University Pines | Florida | Pensacola |
| The Meadows and Arbors at Countrywood | Florida | Plant City |
| Del Webb at Ponte Vedra | Florida | Ponte Vedra |
| Maple Leaf Golf and Country Club | Florida | Port Charlotte |
| Port Charlotte Village | Florida | Port Charlotte |
| Vizcaya Lakes | Florida | Port Charlotte |
| Briarwood | Florida | Port Orange |
| La Costa Village | Florida | Port Orange |
| Lamplighter | Florida | Port Orange |
| Lighthouse Pointe at Daytona Beach | Florida | Port Orange |
| Villages of Royal Palm | Florida | Port Orange |
| Cascades At St. Lucie West | Florida | Port Saint Lucie |
| Kings Isle | Florida | Port Saint Lucie |
| Savanna Club | Florida | Port Saint Lucie |
| Spanish Lakes | Florida | Port Saint Lucie |
| The Brennity at Port St. Lucie | Florida | Port Saint Lucie |
| TownPark at Tradition | Florida | Port Saint Lucie |
| Tradition | Florida | Port Saint Lucie |
| Vitalia at Tradition | Florida | Port Saint Lucie |
| Alligator Park | Florida | Punta Gorda |
| Blue Heron Pines | Florida | Punta Gorda |
| Buttonwood Village | Florida | Punta Gorda |
| Emerald Lake | Florida | Punta Gorda |
| River Haven | Florida | Punta Gorda |
| Tropical Palms Punta Gorda | Florida | Punta Gorda |
| Windmill Village | Florida | Punta Gorda |
| Hawaiian Isles RV Resort | Florida | Ruskin |
| Riverside Club | Florida | Ruskin |

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| Cascades at World Golf Village | Florida | Saint Augustine |
| Coquina Crossing | Florida | Saint Augustine |
| South Hampton | Florida | Saint Augustine |
| Americana Cove | Florida | Saint Petersburg |
| Boca Ciega Point Condominiums | Florida | Saint Petersburg |
| Emmanuel Manor Assisted Living Facility | Florida | Saint Petersburg |
| Gull Harbor | Florida | Saint Petersburg |
| Park Royale | Florida | Saint Petersburg |
| The Fountains at Boca Ciega Bay | Florida | Saint Petersburg |
| The Princess Martha | Florida | Saint Petersburg |
| Village Green St. Petersburg | Florida | Saint Petersburg |
| Bahia Vista Estates | Florida | Sarasota |
| Camelot East | Florida | Sarasota |
| Camelot Lakes | Florida | Sarasota |
| Cascades of Sarasota | Florida | Sarasota |
| Esplanade | Florida | Sarasota |
| North River Estates | Florida | Sarasota |
| Palmer Ranch | Florida | Sarasota |
| Royal Palms | Florida | Sarasota |
| Sarasota Bay Club | Florida | Sarasota |
| The Fountains at Lake Pointe Woods | Florida | Sarasota |
| The Isles on Palmer Ranch | Florida | Sarasota |
| The Winds of St. Armands North | Florida | Sarasota |
| Tri Par Estates | Florida | Sarasota |
| University Park Country Club | Florida | Sarasota |
| Villa Grande at Sarasota | Florida | Sarasota |
| Whispering Sands | Florida | Sarasota |
| Barefoot Bay | Florida | Sebastian |
| Beach Cove Sebastian | Florida | Sebastian |
| Park Place | Florida | Sebastian |
| Pelican Bay | Florida | Sebastian |
| Covered Bridge | Florida | Sebring |
| Highlands Ridge | Florida | Sebring |
| Lily Lake Golf Resort | Florida | Sebring |
| Clover Leaf Farms | Florida | Spring Hill |
| Forrest Glenn | Florida | Spring Hill |
| Heritage Pines Country Club Community | Florida | Spring Hill |
| Timber Pines Community Association | Florida | Spring Hill |
| Wellington at Seven Hills | Florida | Spring Hill |

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| Indian Pines | Florida | Stuart |
| Miles Grant Country Club | Florida | Stuart |
| Monterey Yacht and Country Club | Florida | Stuart |
| Pinelake Gardens | Florida | Stuart |
| Freedom Plaza at Sun City Center | Florida | Sun City Center |
| Kings Point | Florida | Sun City Center |
| Sun City Center | Florida | Sun City Center |
| Sun City Center Old TR | Florida | Sun City Center |
| Westminster Oaks | Florida | Tallahassee |
| Fish Hawk Ranch | Florida | Tampa |
| Fountainview | Florida | Tampa |
| Lakeshore Villas | Florida | Tampa |
| Southshore Falls Del Webb | Florida | Tampa |
| StrawBerry Ridge Community | Florida | Tampa |
| Sun City Center Tampa | Florida | Tampa |
| The Groves | Florida | Tampa |
| University Village | Florida | Tampa |
| Waterset | Florida | Tampa |
| Winward Lakes | Florida | Tampa |
| Winward Lakes | Florida | Tampa |
| Winward Lakes | Florida | Tampa |
| Chesapeake Point Co-op | Florida | Tarpon Springs |
| Village of Lakeside Landings | Florida | The Villages |
| Alameda Isles | Florida | Venice |
| Bay Indies | Florida | Venice |
| Grand Palm | Florida | Venice |
| IslandWalk at West Villages | Florida | Venice |
| Jacaranda Trace | Florida | Venice |
| Venetian Falls | Florida | Venice |
| Venice Isle | Florida | Venice |
| Countryside at Vero Beach | Florida | Vero Beach |
| Heron Cay | Florida | Vero Beach |
| Indian River Estates West | Florida | Vero Beach |
| Oak Harbor Club | Florida | Vero Beach |
| Vista Royale | Florida | Vero Beach |
| Waterway Village | Florida | Vero Beach |
| Woodfield | Florida | Vero Beach |
| Hyde Park | Florida | Winter Garden |
| Cypress Creek Village | Florida | Winter Haven |

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| Four Lakes Club | Florida | Winter Haven |
| Lakeridge Condominiums | Florida | Winter Haven |
| Traditions | Florida | Winter Haven |
| Leisure Days | Florida | Zephyrhills |
| Ramblewood Mobile Home Community | Florida | Zephyrhills |
| Del Webb Village at Deaton Creek | Georgia | Alpharetta |
| Parc Alpharetta | Georgia | Alpharetta |
| The Cottages of Monroe | Georgia | Athens |
| Atlantic Station | Georgia | Atlanta |
| Bel-Aire | Georgia | Atlanta |
| Big Canoe | Georgia | Atlanta |
| Brannon Oak Farm | Georgia | Atlanta |
| Brookhaven at Johns Creek | Georgia | Atlanta |
| Brookhaven at Sugarloaf | Georgia | Atlanta |
| Merrill Gardens at Dunwoody | Georgia | Atlanta |
| Mount Vernon Towers | Georgia | Atlanta |
| Parc at Duluth | Georgia | Atlanta |
| Park Springs | Georgia | Atlanta |
| Peachtree Hills Place | Georgia | Atlanta |
| The Haven at Slater Mill | Georgia | Atlanta |
| The Piedmont at Buckhead | Georgia | Atlanta |
| Riverwood Plantation | Georgia | Augusta |
| Parkland Manor | Georgia | Austell |
| The Oaks at Blue Ridge | Georgia | Blue Ridge |
| Cadence | Georgia | Canton |
| The Lodge at Bridge Mill | Georgia | Canton |
| Serenbe | Georgia | Chattahoochee Hills |
| Ballantrae At Creekstone Estates | Georgia | Cumming |
| Brookhaven at Lanier Ridge | Georgia | Cumming |
| Habersham Grove | Georgia | Cumming |
| Piedmont Corners | Georgia | Cumming |
| Wellstone | Georgia | Cumming |
| River Knoll | Georgia | Dahlonega |
| The Summit of Dahlonega | Georgia | Dahlonega |
| The Villas at Blackberry Run | Georgia | Dallas GA |
| Windsong at Seven Hills | Georgia | Dallas GA |
| Windsong Manor | Georgia | Dallas GA |
| The Regency House | Georgia | Decatur |
| Cresswind at Lake Lanier | Georgia | Gainesville GA |

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| Lanier Village Estates | Georgia | Gainesville GA |
| Magnolia Village Active Adult Community | Georgia | Gainesville GA |
| Sterling on the Lake | Georgia | Gainesville GA |
| Olde Town Grayson | Georgia | Grayson |
| Del Webb at Lake Oconee | Georgia | Greensboro-Oconee |
| Sun City Peachtree | Georgia | Griffin |
| Brookhaven of East Cobb | Georgia | Kennesaw |
| Carlyle Place, Navicent Health | Georgia | Macon |
| The Cottages on Wesleyan | Georgia | Macon |
| The Gables at Wolf Creek | Georgia | Macon |
| Madison Lakes | Georgia | Madison GA |
| Parc at Piedmont - East Cobb | Georgia | Marietta |
| Walton Village | Georgia | Marietta |
| Wymberly by JENSEN communities | Georgia | Martinez |
| The Cottages at Woodland Terrace | Georgia | Milledgeville |
| Arbor Terrace at Peachtree City | Georgia | Peachtree City |
| Horizon Bay | Georgia | Rome |
| Riverwood Retirement Community | Georgia | Rome |
| The Village at Maplewood | Georgia | Rome |
| Marsh's Edge | Georgia | Saint Simons |
| Carlisle Village | Georgia | Savannah-GA |
| SouthBridge | Georgia | Savannah-GA |
| The Fairways at Savannah Quarters | Georgia | Savannah-GA |
| WaterWays Township | Georgia | Savannah-GA |
| Winding River | Georgia | St Marys |
| Madison Grove | Georgia | Thomasville |
| Southern Landing | Georgia | Valdosta |
| Lake Arrowhead | Georgia | Waleska |
| Villas at Winder | Georgia | Winder |
| Heron Pond | Georgia | Woodstock |
| The Cottages of Woodstock | Georgia | Woodstock |
| Windsong Somerset | Georgia | Woodstock |
| Brooke View | Idaho | Boise City |
| Chateau de Boise | Idaho | Boise City |
| Englefield Green | Idaho | Boise City |
| Parkview Rental Condominiums | Idaho | Boise City |
| West Meadow Estates | Idaho | Boise City |
| Affinity at Coeur d Alene | Idaho | Coeur dAlene |
| Golden Spike Estates | Idaho | Coeur dAlene |

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| Meadow Ranch | Idaho | Coeur dAlene |
| The Village at Riverstone | Idaho | Coeur dAlene |
| The Village at Syringa Gardens | Idaho | Coeur dAlene |
| Touchmark at Meadow Lake Village | Idaho | Meridian |
| Carillon at Stonegate | Illinois | Aurora |
| Steeplechase | Illinois | Aurora |
| Regency at the Woods of South Barrington | Illinois | Barrington |
| The Garlands of Barrington | Illinois | Barrington |
| Beacon Hill | Illinois | Chicago |
| Golf Vista Estates | Illinois | Chicago |
| Grand Dominion | Illinois | Chicago |
| Maple Brook | Illinois | Chicago |
| Oak Ridge | Illinois | Chicago |
| Plymouth Place | Illinois | Chicago |
| The Clare | Illinois | Chicago |
| The New Admiral at the Lake | Illinois | Chicago |
| Timbers Edge Villas | Illinois | Chicago |
| The Fountains at Crystal Lake | Illinois | Crystal Lake |
| Oak Trace | Illinois | Downers Grove |
| Bowes Creek Country Club | Illinois | Elgin |
| Carillon at Cambridge Lakes | Illinois | Elgin |
| Edgewater by Del Webb | Illinois | Elgin |
| River Crossing | Illinois | Elgin |
| Willow Lake Estates | Illinois | Elgin |
| The Mather | Illinois | Evanston |
| Saddlebrook Farms | Illinois | Grayslake |
| Haverford Place | Illinois | Hoffman Estates |
| Sun City Huntley | Illinois | Huntley |
| Sedgebrook | Illinois | Lincolnshire |
| Monarch Landing | Illinois | Naperville |
| Carillon | Illinois | Plainfield |
| Lago Vista | Illinois | Plainfield |
| Villas at Fox Run | Illinois | Plainfield |
| Mather Place of Wilmette | Illinois | Wilmette |
| Carmel Health and Living | Indiana | Carmel-IN |
| Parkside Court | Indiana | Columbus |
| Villas of Stonecrest | Indiana | Columbus |
| Willow Park Retirement | Indiana | Evansville |
| Britton Falls | Indiana | Fishers |

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| The Villas at Geist | Indiana | Fishers |
| Vandalia | Indiana | Indianapolis |
| Chesapeake Village | Indiana | North Judson |
| Peabody Retirement Community | Indiana | North Manchester |
| The Hearth at Sycamore | Indiana | North Manchester |
| Holy Cross Village | Indiana | Notre Dame |
| Courtyards at Pepper Creek | Indiana | Valparaiso |
| Villas at Vale Park | Indiana | Valparaiso |
| Northcrest Community | Iowa | Ames |
| Vennehjem | Iowa | Decorah |
| Deerfield | Iowa | Des Moines |
| Green Hills Retirement Community | Iowa | Des Moines |
| The Village at Legacy Pointe | Iowa | Des Moines |
| Claridge Court | Kansas | Kansas City |
| Windhill Estates | Kansas | Kansas City |
| Brandon Woods at Alvarar | Kansas | Lawrence |
| Presbyterian Manor of Lawrence | Kansas | Lawrence |
| Helmwood Healthcare Center | Kentucky | Elizabethtown |
| Atria Summit Hills | Kentucky | Florence |
| Ashwood Place | Kentucky | Frankfort |
| The Lafayette | Kentucky | Lexington-Fayette |
| Oxmoor Lodge | Kentucky | Louisville |
| Ponder Creek Estates | Kentucky | Louisville |
| The Greens at Pelican Point | Louisiana | Baton Rouge |
| Village Charmant | Louisiana | Baton Rouge |
| Village Maison- Active Adult Community | Louisiana | Baton Rouge |
| The Oaks of Louisiana | Louisiana | Bossier City |
| Willow Lake | Louisiana | Bossier City |
| Sugar Mill Pond | Louisiana | Lafayette |
| The Village of River Ranch | Louisiana | Lafayette |
| England Oaks | Louisiana | Natchitoches |
| Eagles Trace | Maine | Acton |
| Keywood Manor LP | Maine | Alfred |
| Shepards Cove on Spruce Creek | Maine | Alfred |
| Birch Bay Village | Maine | Bar Harbor |
| The Cottages At Willett Brook | Maine | Bridgton |
| Highland Green | Maine | Brunswick |
| St. Andrews Village | Maine | Brunswick |
| Thornton Oaks | Maine | Brunswick |

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| Penobscot Shores | Maine | Camden |
| Quarry Hill | Maine | Camden |
| Village Crossings at Cape Elizabeth | Maine | Cape Elizabeth |
| Pheasant Knoll Condominiums | Maine | Gorham |
| Avalon Village | Maine | Orono |
| Dirigo Pines Retirement Community | Maine | Orono |
| Piper Shores | Maine | Portland |
| The Cedars | Maine | Portland |
| The Woods at Canco | Maine | Portland |
| Cameron Grove | Maryland | Annapolis |
| Carrolls Creek | Maryland | Annapolis |
| Emerald Hills Condominiums | Maryland | Annapolis |
| Four Seasons at Saint Margarets | Maryland | Annapolis |
| Heritage Harbour | Maryland | Annapolis |
| Shipleys Crossing | Maryland | Annapolis |
| The Villages at Two Rivers | Maryland | Annapolis |
| Fox Hills Club | Maryland | Bethesda |
| Leisure World of Maryland | Maryland | Bethesda |
| The Harbours at Solomons Island | Maryland | California |
| The Villages at Wildewood | Maryland | California |
| Symphony Village | Maryland | Centreville |
| Heron Point | Maryland | Chestertown |
| Evergreens at Columbia Town Center | Maryland | Columbia-MD |
| Legacy at the Courtyards | Maryland | Columbia-MD |
| Snowden Overlook Villas | Maryland | Columbia-MD |
| Vantage House | Maryland | Columbia-MD |
| Cookes Hope | Maryland | Easton |
| Hyde Park by JENSEN communities | Maryland | Easton |
| Londonderry on the Tred Avon | Maryland | Easton |
| William Hill Manor | Maryland | Easton |
| Village of Cecil Woods | Maryland | Elkton |
| Alta at Regency Crest | Maryland | Ellicott City |
| Castlefield | Maryland | Ellicott City |
| Charlestown Retirement Community | Maryland | Ellicott City |
| Gatherings at Ellicott Mills | Maryland | Ellicott City |
| Lutheran Village at Millers Grant | Maryland | Ellicott City |
| Patapsco Overlook | Maryland | Ellicott City |
| Carroll Vista | Maryland | Frederick |
| Kentlands Manor | Maryland | Gaithersburg |

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| The Kentlands | Maryland | Gaithersburg |
| Village at Freedom Hills | Maryland | Hagerstown |
| Central Parke at Victoria Falls | Maryland | Laurel-MD |
| Legacy at Cherrytree | Maryland | Laurel-MD |
| The Willows at Victoria Falls | Maryland | Laurel-MD |
| Waterfront Street | Maryland | National Harbor |
| The Parke at Ocean Pines | Maryland | Ocean City town |
| Mallard Landing Retirement Community | Maryland | Salisbury |
| SummersGate | Maryland | Salisbury |
| Oakview Estates | Massachusetts | Bedford |
| Regency at Bolton | Massachusetts | Bolton |
| Trail Ridge at Harvard | Massachusetts | Bolton |
| Balancing Rock | Massachusetts | Boston |
| English Commons | Massachusetts | Boston |
| Fairing Way | Massachusetts | Boston |
| Lasell Village | Massachusetts | Boston |
| Leisurewoods | Massachusetts | Boston |
| NewBridge on the Charles | Massachusetts | Boston |
| Regency at Assabet Ridge | Massachusetts | Boston |
| The Apartments at Coolidge School | Massachusetts | Boston |
| The Commons in Lincoln | Massachusetts | Boston |
| Orleans Place | Massachusetts | Chatham |
| The Chatham House | Massachusetts | Chatham |
| The Melrose | Massachusetts | Chatham |
| Duxbury Estates | Massachusetts | Duxbury |
| Rockland Glen | Massachusetts | Duxbury |
| Atria Woodbriar Place | Massachusetts | Falmouth |
| Southport | Massachusetts | Falmouth |
| Meadowbrook Heights | Massachusetts | Franklin MA |
| Angell Brook Village | Massachusetts | Hudson |
| The Villages at Quail Run | Massachusetts | Hudson |
| WestRidge | Massachusetts | Hudson |
| Blue Heron Pond | Massachusetts | Lancaster |
| Kimball Farms | Massachusetts | Lenox |
| Regency at Methuen | Massachusetts | Methuen |
| Stone Castle Estates | Massachusetts | Methuen |
| The Village at Russell Farm | Massachusetts | Methuen |
| Fuller Village in Milton | Massachusetts | Milton |
| North Hill | Massachusetts | Needham |

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| Lathrop Townhomes | Massachusetts | Northampton |
| Red Mill Village | Massachusetts | Norton |
| Great Island by Del Webb | Massachusetts | Plymouth |
| Oak Point | Massachusetts | Plymouth |
| Pine Hill Estates | Massachusetts | Plymouth |
| Plimouth Commons | Massachusetts | Plymouth |
| Seton Highlands | Massachusetts | Plymouth |
| Tara Woods | Massachusetts | Plymouth |
| The Pinehills | Massachusetts | Plymouth |
| The Residences at LeBaron Hills | Massachusetts | Plymouth |
| Village at South Meadow | Massachusetts | Plymouth |
| Village Crossing | Massachusetts | Plymouth |
| The American Inn at Sawmill Park | Massachusetts | Southwick |
| East Village Place | Massachusetts | Springfield |
| Glenmeadow | Massachusetts | Springfield |
| Summerfield at Taft Hill | Massachusetts | Uxbridge |
| Waterstone at Wellesley | Massachusetts | Wellesley |
| Highland Meadows | Massachusetts | Weston |
| Bridgewater | Michigan | Ann Arbor |
| Grand Reserve | Michigan | Ann Arbor |
| University Commons | Michigan | Ann Arbor |
| The Village at the Pines | Michigan | Grand Haven |
| Leisure Village in Michigan | Michigan | Grand Rapids |
| Oaks of Rockford | Michigan | Grand Rapids |
| Sentinel Pointe Retirement Community | Michigan | Grand Rapids |
| Freedom Village | Michigan | Holland |
| The Fountains at Bronson Place | Michigan | Kalamazoo |
| WeatherStone Village Community | Michigan | Kalamazoo |
| Heritage in the Hills | Michigan | Southfield |
| The Fountains at Franklin | Michigan | Southfield |
| Four Seasons at Rush Creek | Minnesota | Minneapolis |
| Friendship Village of Bloomington | Minnesota | Minneapolis |
| Nokomis Square Cooperative | Minnesota | Minneapolis |
| Waters of Minnehaha | Minnesota | Minneapolis |
| Village on the Cannon | Minnesota | Northfield |
| Mineral Creek Landing | Mississippi | Hattiesburg |
| Bella Casa | Missouri | Columbia |
| The Terrace | Missouri | Columbia |
| The Village of Bedford Walk | Missouri | Columbia |

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| The Villas of Eastern Hills | Missouri | Harrisonville |
| The Fountains at Greenbriar | Missouri | Independence |
| Timberlake Village | Missouri | Lake Ozark |
| Villas at Wicklow | Missouri | Springfield |
| GrayHawk Village | Missouri | St Louis |
| Heritage of Hawk Ridge | Missouri | St Louis |
| Meadows of Wildwood | Missouri | St Louis |
| Affinity at Billings | Montana | Billings |
| Aspen View | Montana | Billings |
| Aspen Pointe | Montana | Bozeman |
| The Knolls at Hillcrest | Montana | Bozeman |
| Hunters Pointe | Montana | Helena |
| StoneyBrook Village | Montana | Helena |
| Touchmark on Saddle Drive | Montana | Helena |
| The Springs at Missoula | Montana | Missoula |
| Just Like Home | Montana | Stevensville |
| Kootenai Creek Village | Montana | Stevensville |
| Brentwood Estates | Nebraska | Lincoln |
| Grand Lodge at the Preserve | Nebraska | Lincoln |
| Lake Mountain Estates | Nevada | Boulder City |
| Lake Las Vegas | Nevada | Henderson |
| Merrill Gardens at Green Valley Ranch | Nevada | Henderson |
| Pristine Terra Bella | Nevada | Henderson |
| Sun City Anthem - Henderson | Nevada | Henderson |
| Sun City McDonald Ranch | Nevada | Henderson |
| Terra Bella | Nevada | Henderson |
| The Club at Madeira Canyon | Nevada | Henderson |
| The Villas at Solera | Nevada | Henderson |
| Vintage at Seven Hills | Nevada | Henderson |
| Acacia Springs | Nevada | Las Vegas |
| Boulder Cascade | Nevada | Las Vegas |
| Country Club at the Meadows | Nevada | Las Vegas |
| Country Club at Valley View | Nevada | Las Vegas |
| Desert Greens | Nevada | Las Vegas |
| Destinations at Eastern | Nevada | Las Vegas |
| Destinations at Winterhaven | Nevada | Las Vegas |
| Flamingo West | Nevada | Las Vegas |
| Heritage Park Senior Apartments | Nevada | Las Vegas |
| Las Vegas Manor | Nevada | Las Vegas |

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| Las Ventanas at Summerlin | Nevada | Las Vegas |
| Rancho Las Brisas | Nevada | Las Vegas |
| Regency at Summerlin | Nevada | Las Vegas |
| River Oaks | Nevada | Las Vegas |
| Shea Homes at Ardiente | Nevada | Las Vegas |
| Sienna Apartment Community | Nevada | Las Vegas |
| Solera at Stallion Mountain by Del Webb | Nevada | Las Vegas |
| Tropicana Palms | Nevada | Las Vegas |
| Highland Fairways | Nevada | Mesquite |
| Sun City Mesquite by Del Webb | Nevada | Mesquite |
| Sun City Aliante | Nevada | North Las Vegas |
| Del Webb Sierra Canyon | Nevada | Reno |
| Five Star Premier Residences of Reno | Nevada | Reno |
| Lakeside Manor Reno | Nevada | Reno |
| Montreux | Nevada | Reno |
| Promenade on the River | Nevada | Reno |
| Regency At Damonte Ranch | Nevada | Reno |
| Sky Peaks | Nevada | Reno |
| Toscana | Nevada | Reno |
| Mansfield Woods | New Hampshire | Campton |
| Farmwood Village by JENSEN communities | New Hampshire | Dover-NH |
| Fitts Farm at Durham | New Hampshire | Durham |
| The Cottages at Britton Lane | New Hampshire | Durham |
| The Cottages at Spruce Wood | New Hampshire | Durham |
| The Vineyards at Stratham | New Hampshire | Durham |
| Black Rocks Village | New Hampshire | Exeter |
| Kings Landing | New Hampshire | Exeter |
| Leddy Fields Condominiums | New Hampshire | Exeter |
| Riverwoods at Exeter | New Hampshire | Exeter |
| Sargent Woods | New Hampshire | Exeter |

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| Sterling Hill at Exeter | New Hampshire | Exeter |
| Franklin Mountain View Estates | New Hampshire | Franklin NH |
| Kendal at Hanover | New Hampshire | Hanover |
| The Greens of Hanover | New Hampshire | Hanover |
| Berry Hill Estates | New Hampshire | Hooksett |
| Brook Ridge by JENSEN communities | New Hampshire | Hooksett |
| The Ridge at Quail Hollow | New Hampshire | Lebanon-NH |
| Hickory Woods | New Hampshire | Manchester-NH |
| Riverwalk at Bedford | New Hampshire | Manchester-NH |
| The Meetinghouse at Riverfront | New Hampshire | Manchester-NH |
| The Regency Collection | New Hampshire | Manchester-NH |
| Hunt Community | New Hampshire | Nashua |
| The Huntington at Nashua | New Hampshire | Nashua |
| RiverMead Lifecare Community | New Hampshire | Peterborough |
| Edgewater Preserve | New Hampshire | Winchester |
| Four Seasons at Mirage | New Jersey | Barnegat |
| Heritage Bay | New Jersey | Barnegat |
| Heritage Point | New Jersey | Barnegat |
| Horizons At Barnegat | New Jersey | Barnegat |
| Pheasant Run | New Jersey | Barnegat |
| Pineview Terrace | New Jersey | Browns Mills |
| The Plaza Grande at Garden State Park | New Jersey | Cherry Hill |
| Cedar Village | New Jersey | East Brunswick |
| Renaissance at Raritan Valley | New Jersey | East Brunswick |
| The Reserve at Canal Walk | New Jersey | East Brunswick |
| Pheasant Run -Forked River | New Jersey | Forked River |
| Applewood Estates | New Jersey | Freehold |

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| Equestra at Colts Neck Crossing | New Jersey | Freehold |
| Fountainhead Properties | New Jersey | Jackson |
| Four Seasons at South Knolls | New Jersey | Jackson |
| West Lake Golf and Country Club | New Jersey | Jackson |
| Covington Village | New Jersey | Lakewood |
| Fairways at Lake Ridge | New Jersey | Lakewood |
| Leisure Village-The Village of Seven Lakes | New Jersey | Lakewood |
| The Enclave at The Fairways | New Jersey | Lakewood |
| The Fairways Master Collection | New Jersey | Lakewood |
| Cranberry Creek | New Jersey | Little Egg Harbor |
| Four Seasons at Harbor Bay | New Jersey | Little Egg Harbor |
| Mullica Woods | New Jersey | Little Egg Harbor |
| Mystic Shores | New Jersey | Little Egg Harbor |
| Sea Oaks Adult Community | New Jersey | Little Egg Harbor |
| Sunrise Bay | New Jersey | Little Egg Harbor |
| Atlantic Hills | New Jersey | Manahawkin |
| Fawn Lakes | New Jersey | Manahawkin |
| Paramount Escapes Ocean Breeze | New Jersey | Manahawkin |
| Perrys Lake | New Jersey | Manahawkin |
| Crestwood Village | New Jersey | Manchester Township |
| Del Webb River Pointe at Manchester | New Jersey | Manchester Township |
| Leisure Knoll | New Jersey | Manchester Township |
| Leisure Village West-Pine Lake Park | New Jersey | Manchester Township |
| LeisureTowne | New Jersey | Medford |
| Medford Leas at Lumberton | New Jersey | Medford |
| Medford Leas at Medford | New Jersey | Medford |
| Four Seasons At Millville | New Jersey | Millville |
| Clearbrook | New Jersey | Monroe Township |
| Concordia | New Jersey | Monroe Township |
| Encore at Monroe | New Jersey | Monroe Township |
| Four Seasons at Monroe | New Jersey | Monroe Township |
| Greenbriar at Whittingham | New Jersey | Monroe Township |
| Greenbriar Stonebridge | New Jersey | Monroe Township |
| Regency at Monroe | New Jersey | Monroe Township |
| Renaissance at Cranbury Crossing | New Jersey | Monroe Township |
| Rossmoor | New Jersey | Monroe Township |

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| Summerfields West | New Jersey | Monroe Township |
| The Ponds at Clearbrook | New Jersey | Monroe Township |
| The Fairways at Mays Landing | New Jersey | Ocean City |
| The Shores | New Jersey | Ocean City |
| Cedar Village at Ocean | New Jersey | Ocean Township-Monmouth |
| Nobility Crest | New Jersey | Ocean Township-Monmouth |
| Deep Run by JENSEN communities | New Jersey | Plumsted |
| Princeton Manor | New Jersey | Princeton |
| Princeton Windrows | New Jersey | Princeton |
| Stonebridge at Montgomery | New Jersey | Princeton |
| The Pointe at Turnberry | New Jersey | Princeton |
| Four Seasons at North Caldwell | New Jersey | Robbinsville |
| Washington Town Center | New Jersey | Robbinsville |
| Four Seasons at Chester | New Jersey | Rockaway Township |
| Greenbriar Fox Ridge | New Jersey | Rockaway Township |
| Greenbriar Woodlands | New Jersey | Toms River |
| Holiday Heights | New Jersey | Toms River |
| Lake Ridge in Toms River | New Jersey | Toms River |
| Del Webb Wanaque Reserve | New Jersey | Wanaque |
| Greenbriar Oceanaire | New Jersey | Waretown |
| Country Walk of Lake Ridge | New Jersey | Whiting |
| Pine Ridge at Crestwood | New Jersey | Whiting |
| The Reserve at Lake Ridge | New Jersey | Whiting |
| The Evergreens | New Jersey | Woodbury |
| Woodbury Mews | New Jersey | Woodbury |
| Amber Skies | New Mexico | Alamogordo |
| Affinity at Albuquerque | New Mexico | Albuquerque |
| Albuquerque Meadows | New Mexico | Albuquerque |
| Bear Canyon Estates | New Mexico | Albuquerque |
| Cabezon | New Mexico | Albuquerque |
| Emeritus at Sandia Springs | New Mexico | Albuquerque |
| La Terraza Senior Apartments | New Mexico | Albuquerque |
| La Vida Llana | New Mexico | Albuquerque |
| Loma Colorado | New Mexico | Albuquerque |
| Mesa del Sol | New Mexico | Albuquerque |
| Sunrise Bluffs | New Mexico | Albuquerque |
| The Lofts at Albuquerque High | New Mexico | Albuquerque |

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| Country Club Estates | New Mexico | Deming |
| Boulders at Sonoma Ranch | New Mexico | Las Cruces |
| Golden Mesa | New Mexico | Las Cruces |
| The Overlook | New Mexico | Las Cruces |
| Trails West | New Mexico | Las Cruces |
| Trails West | New Mexico | Las Cruces |
| Jubilee Los Lunas | New Mexico | Los Lunas |
| Fairwinds Rio Rancho | New Mexico | Rio Rancho |
| Deer Crossing RV Park | New Mexico | Ruidoso |
| Aldea de Santa Fe | New Mexico | Santa Fe |
| Rancho Viejo | New Mexico | Santa Fe |
| Sand River Cohousing | New Mexico | Santa Fe |
| Staying in Place | New York | Bethel |
| Glassbury Court at Cold Spring NY | New York | Carmel |
| Retreat at Carmel | New York | Carmel |
| Parkside Village | New York | Cheektowaga |
| The Villas at Calla Pointe | New York | Cheektowaga |
| Cherrywood by JENSEN communities | New York | Clinton |
| Wildflower Hills Community | New York | Finger Lakes Region |
| Meadowbrook Pointe | New York | Islandia |
| The Arbors Assisted Living | New York | Islandia |
| Horizon Villages | New York | Ithaca |
| Kendal at Ithaca | New York | Ithaca |
| Regency at Fishkill | New York | Middletown |
| Wildflowers at Wallkill | New York | Middletown |
| The Fountains at Millbrook | New York | Millbrook |
| Plymouth Estates at Mt. Sinai | New York | Mt. Sinai |
| Atria Bay Shore | New York | New York |
| Atria West 86 | New York | New York |
| Carnegie East House | New York | New York |
| The Tides at Charleston | New York | New York |
| Fountaingate Gardens | New York | Port Jefferson |
| Jefferson's Ferry | New York | Port Jefferson |
| The Vineyards at Miller Place | New York | Port Jefferson |
| Woodcrest Estates | New York | Port Jefferson |
| Leisure Village - Ridge | New York | Ridge-Long Island |
| Glenwood Village | New York | Riverhead |
| Greenwood Village | New York | Riverhead |
| Macleod Communities, Inc. | New York | Riverhead |

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| Peconic Landing | New York | Riverhead |
| Stoneleigh Woods | New York | Riverhead |
| Saranac Village at Will Rodgers | New York | Saranac Lake |
| Eastwyck Village | New York | Saratoga Springs |
| Park Place Condominiums | New York | Saratoga Springs |
| Prestwick Chase | New York | Saratoga Springs |
| Club at Clove Lakes Park | New York | Staten Island |
| The Fountains at RiverVue | New York | Tuckahoe |
| The Views at Pomona | New York | Tuckahoe |
| Lakeview Seniors | New York | Union Springs |
| The Hearth at Green Point | New York | Union Springs |
| Ardenwoods | North Carolina | Asheville |
| Biltmore Lake | North Carolina | Asheville |
| Crowfields | North Carolina | Asheville |
| Deerfield Episcopal Retirement Community | North Carolina | Asheville |
| Lofts at Mica Village | North Carolina | Asheville |
| Scenic Resort | North Carolina | Asheville |
| College Walk | North Carolina | Brevard |
| Connestee Falls | North Carolina | Brevard |
| Qualla Village | North Carolina | Brevard |
| Straus Park | North Carolina | Brevard |
| Devaun Park | North Carolina | Calabash |
| Carpenter Village | North Carolina | Cary |
| Del Webb Carolina Preserve | North Carolina | Cary |
| Heritage Pines | North Carolina | Cary |
| The Courtyards at OKelly Chapel | North Carolina | Cary |
| Carol Woods Retirement Community | North Carolina | Chapel Hill |
| Carolina Meadows Continuing Care Retirement Community | North Carolina | Chapel Hill |
| Chapelwood | North Carolina | Chapel Hill |
| Galloway Ridge | North Carolina | Chapel Hill |
| The Cedars of Chapel Hill | North Carolina | Chapel Hill |
| The Courtyards at Homestead Road | North Carolina | Chapel Hill |
| The Villas at Culp Arbor | North Carolina | Chapel Hill |
| 3 Cherry Way | North Carolina | Charlotte |
| Brightmore of South Charlotte | North Carolina | Charlotte |
| Brookdale Carriage Club of Charlotte | North Carolina | Charlotte |
| Carolina Lakes by Sun City | North Carolina | Charlotte |
| The Cottages | North Carolina | Charlotte |

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| The Courtyards at Harrisburg | North Carolina | Charlotte |
| The Cypress of Charlotte | North Carolina | Charlotte |
| The Dorchester - Village of Carolina Place | North Carolina | Charlotte |
| The Manor Charlotte | North Carolina | Charlotte |
| Trilogy Lake Norman | North Carolina | Charlotte |
| Unlimited Possibilities Family Care Home | North Carolina | Charlotte |
| Baileys Glen | North Carolina | Cornelius |
| Creekside at Bethpage | North Carolina | Durham |
| Four Seasons at Renaissance | North Carolina | Durham |
| The Forest at Duke | North Carolina | Durham |
| Anderson Creek Club | North Carolina | Fayetteville |
| Carolina Highlands | North Carolina | Fayetteville |
| Meadow Walk | North Carolina | Fayetteville |
| Sanctuary Village | North Carolina | Franklin |
| The Village at Aversboro | North Carolina | Garner |
| Abbotswood at Irving Park | North Carolina | Greensboro |
| Heritage Greens | North Carolina | Greensboro |
| Villas at Deep River Plantation | North Carolina | Greensboro |
| Villas at Sedgefield | North Carolina | Greensboro |
| Cypress Glen | North Carolina | Greenville |
| Coastal Plantation by JENSEN communities | North Carolina | Hampstead |
| RiverWalk of Hayesville | North Carolina | Hayesville |
| Carolina Village | North Carolina | Hendersonville |
| Carriage Park Hendersonville | North Carolina | Hendersonville |
| Lake Pointe Landing | North Carolina | Hendersonville |
| Legacy at Mills River | North Carolina | Hendersonville |
| Riverwind | North Carolina | Hendersonville |
| The Half-Way Tree Mobile Home Park | North Carolina | Hendersonville |
| The Woodlands at Olivers Landing | North Carolina | Hickory |
| 12 Oaks | North Carolina | Holly Springs |
| The Courtyards of Marvin | North Carolina | Marvin |
| Plantation Estates | North Carolina | Matthews |
| The Courtyards at Emerald Lake | North Carolina | Matthews |
| Carolina Colours | North Carolina | New Bern |
| Trent Woods | North Carolina | New Bern |
| Quail Haven Village | North Carolina | Pinehurst Village |
| Abbotswood at Stonehenge | North Carolina | Raleigh |
| Ashbury Crossing | North Carolina | Raleigh |
| Bedford at Falls River | North Carolina | Raleigh |

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| Independence Village of Olde Raleigh | North Carolina | Raleigh |
| Longleaf at Flowers Plantation | North Carolina | Raleigh |
| Magnolia Glen | North Carolina | Raleigh |
| The Cypress of Raleigh | North Carolina | Raleigh |
| Cambridge Crossings | North Carolina | Southport |
| St. James Plantation | North Carolina | Southport |
| Dock Street Townhomes | North Carolina | Sunset Beach |
| The Fountains at the Albemarle | North Carolina | Tarboro |
| Heritage Wake Forest | North Carolina | Wake Forest |
| The Villas of Wake Forest | North Carolina | Wake Forest |
| Cambridge Village of Wilmington | North Carolina | Wilmington |
| Carolina Bay at Autumn Hall | North Carolina | Wilmington |
| Plantation Village | North Carolina | Wilmington |
| TidalWalk | North Carolina | Wilmington |
| Arbor Acres | North Carolina | Winston-Salem |
| Bermuda Village | North Carolina | Winston-Salem |
| Homestead Hills | North Carolina | Winston-Salem |
| Millhaven Landing | North Carolina | Winston-Salem |
| The Meadowlands in Mandan | North Dakota | Bismarck |
| Touchmark on West Century | North Dakota | Bismarck |
| Touchmark at Harwood Groves | North Dakota | Fargo |
| Crossings at West Valley | Ohio | Amherst |
| Villas at Center Park | Ohio | Amherst |
| Carrington Court | Ohio | Cleveland |
| Judson Manor | Ohio | Cleveland |
| Pioneer Ridge | Ohio | Cleveland |
| Reflections Retirement Community | Ohio | Columbus |
| The Courtyards at Maxtown Road | Ohio | Columbus |
| Cardinal Retirement Village | Ohio | Cuyahoga Falls |
| Copley Place | Ohio | Cuyahoga Falls |
| Austin Manor | Ohio | Delaware |
| Indian Hills Senior Community | Ohio | Euclid |
| Park Hills Crossing | Ohio | Fairborn |
| The Mews at Pinnacle Club | Ohio | Grove City |
| Laurel Lake | Ohio | Hudson |
| Otterbein Senior Lifestyle Choices | Ohio | Lebanon |
| Greenbriar at River Valley | Ohio | North Royalton |
| Kendal at Oberlin | Ohio | Oberlin |
| The Knolls of Oxford | Ohio | Oxford OH |

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| Copeland Oaks Retirement Community | Ohio | Sebring |
| Westbrook Senior Village | Ohio | Toledo |
| Villas at Trotters Pointe | Ohio | Washington Court House |
| Bristol Village | Ohio | Waverly |
| Gardens at Westlake | Ohio | Westlake |
| Hillcrest Village | Oklahoma | Bartlesville |
| Tallgrass Estates | Oklahoma | Bartlesville |
| Touchmark at Coffee Creek | Oklahoma | Edmond |
| Concordia Life Care Community | Oklahoma | Oklahoma City |
| Grace Pointe Living | Oklahoma | Oklahoma City |
| The Fountains at Canterbury | Oklahoma | Oklahoma City |
| Village on the Park Oklahoma City | Oklahoma | Oklahoma City |
| Hyde Park at Tulsa Hills | Oklahoma | Tulsa |
| Montereau | Oklahoma | Tulsa |
| Mountain Meadows | Oregon | Ashland |
| Hearthstone at Murrayhill | Oregon | Beaverton |
| Cascade Village | Oregon | Bend |
| Falls at Eagle Crest | Oregon | Bend |
| Northwest Crossing | Oregon | Bend |
| Pilot Butte Village | Oregon | Bend |
| Touchmark at Mt. Bachelor Village | Oregon | Bend |
| Whispering Winds | Oregon | Bend |
| Emerald Coast Estates | Oregon | Brookings |
| Stoneybrook Lodge | Oregon | Corvallis |
| The Regent | Oregon | Corvallis |
| Ceres Gleann | Oregon | Dallas |
| Falcon Wood Village | Oregon | Eugene |
| Gainsborough | Oregon | Eugene |
| Songbrook | Oregon | Eugene |
| Terpening Terrace | Oregon | Eugene |
| Willamette Oaks | Oregon | Eugene |
| Florentine Estates | Oregon | Florence |
| Horizon Village | Oregon | Grants Pass |
| Westlake Village | Oregon | Grants Pass |
| Pioneer Village | Oregon | Jacksonville OR |
| RidgeWater OR | Oregon | Klamath Falls |
| The Running Y Ranch | Oregon | Klamath Falls |
| Anna Maria Creekside | Oregon | Medford |

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| Barnett Woods | Oregon | Medford |
| Fountain Plaza | Oregon | Medford |
| Horton Plaza | Oregon | Medford |
| Rogue Valley Manor | Oregon | Medford |
| Royal Oak Retirement Community | Oregon | Medford |
| The Springs at Anna Maria | Oregon | Medford |
| Twin Creeks | Oregon | Medford |
| Veranda Park | Oregon | Medford |
| Vineyard Place | Oregon | Milwaukie |
| Calaroga Terrace | Oregon | Portland OR |
| Claremont | Oregon | Portland OR |
| Courtyard Village | Oregon | Portland OR |
| Creekside Village Retirement Residence | Oregon | Portland OR |
| Encore Senior Village at Portland | Oregon | Portland OR |
| King City | Oregon | Portland OR |
| Laurel Parc at Bethany Village | Oregon | Portland OR |
| Marys Woods at Marylhurst | Oregon | Portland OR |
| Mirabella Portland | Oregon | Portland OR |
| Quail Hollow OR | Oregon | Portland OR |
| Rainbow Vista | Oregon | Portland OR |
| Rose Villa | Oregon | Portland OR |
| Summerfield | Oregon | Portland OR |
| Knoll Terrace | Oregon | Roseburg |
| Linus Oakes Retirement Village | Oregon | Roseburg |
| Littlebrook | Oregon | Roseburg |
| Rose Village | Oregon | Roseburg |
| Hidden Lakes | Oregon | Salem |
| Madrona Hills | Oregon | Salem |
| Paradise Island Park | Oregon | Salem |
| Salemtowne | Oregon | Salem |
| Terrace Lake Park | Oregon | Salem |
| Cascade Park Retirement Center | Oregon | Woodburn |
| Country Meadows Village | Oregon | Woodburn |
| Woodburn Senior Estates Golf and Country Club | Oregon | Woodburn |
| Traditions of America at Bridle Path | Pennsylvania | Bethlehem |
| Willow Green | Pennsylvania | Bethlehem |
| Blue Bell Place | Pennsylvania | Blue Bell |
| Bluestone Creek | Pennsylvania | Blue Bell |
| Ivy Greene | Pennsylvania | Blue Bell |

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| Meadow Glen at Skippack | Pennsylvania | Blue Bell |
| Normandy Farms Estates | Pennsylvania | Blue Bell |
| Creek View Community | Pennsylvania | Carlisle |
| Traditions of America at Saucon Valley | Pennsylvania | Center Valley |
| Stoneridge Commons of Grove City | Pennsylvania | Grove City |
| Amesbury | Pennsylvania | Harrisburg |
| Carmella | Pennsylvania | Harrisburg |
| Pine Manor | Pennsylvania | Harrisburg |
| The Links at Gettysburg | Pennsylvania | Harrisburg |
| Traditions of America at Silver Spring | Pennsylvania | Harrisburg |
| Knob Hill Farm | Pennsylvania | Honey Brook |
| The Woods at Rock Raymond | Pennsylvania | Honey Brook |
| Wildflowers at Hillview | Pennsylvania | Honey Brook |
| Garden Spot Village | Pennsylvania | Lancaster |
| Home Towne Square | Pennsylvania | Lancaster |
| Providence Park | Pennsylvania | Lancaster |
| Traditions of America at Lititz | Pennsylvania | Lancaster |
| Watson Run | Pennsylvania | Lancaster |
| Willow Valley | Pennsylvania | Lancaster |
| Alden Place | Pennsylvania | Lebanon |
| Briar Lake | Pennsylvania | Lebanon |
| Swatara Creek Retirement Community | Pennsylvania | Lebanon |
| Sweetbriar | Pennsylvania | Lebanon |
| Fox Hill Farm | Pennsylvania | Media |
| Rose Tree Place | Pennsylvania | Media |
| Messiah Lifeways at Mount Joy Country Homes | Pennsylvania | Mount Joy |
| Athertyn | Pennsylvania | Philadelphia |
| Buckingham Springs | Pennsylvania | Philadelphia |
| Creekside Village | Pennsylvania | Philadelphia |
| Forest Ridge | Pennsylvania | Philadelphia |
| Foulkeways | Pennsylvania | Philadelphia |
| Foxfield at Naamans Creek | Pennsylvania | Philadelphia |
| Lamplighter Village PA | Pennsylvania | Philadelphia |
| Neshaminy Falls | Pennsylvania | Philadelphia |
| The Preserve at Lamplighter | Pennsylvania | Philadelphia |
| The Villages at Pine Valley | Pennsylvania | Philadelphia |
| The Villas at Foxfield | Pennsylvania | Philadelphia |
| The Villas of Flowers Mill | Pennsylvania | Philadelphia |
| The Watermark at Logan Square | Pennsylvania | Philadelphia |

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| Traditions at Ridley Creek | Pennsylvania | Philadelphia |
| Villas at Five Ponds | Pennsylvania | Philadelphia |
| Villas at Shady Brook | Pennsylvania | Philadelphia |
| Yardley Point | Pennsylvania | Philadelphia |
| Yorktown | Pennsylvania | Philadelphia |
| Coldstream Crossing | Pennsylvania | Phoenixville |
| Regency Hills at Providence | Pennsylvania | Phoenixville |
| Spring Mill Senior Living | Pennsylvania | Phoenixville |
| Bethel Park | Pennsylvania | Pittsburgh |
| Clover Commons | Pennsylvania | Pittsburgh |
| Friendship Village of South Hills | Pennsylvania | Pittsburgh |
| South Hills Retirement Residence | Pennsylvania | Pittsburgh |
| St. Barnabas Communities | Pennsylvania | Pittsburgh |
| The Village at Whitehall | Pennsylvania | Pittsburgh |
| Traditions of America at Sewickley Ridge | Pennsylvania | Pittsburgh |
| Traditions of America Liberty Hills | Pennsylvania | Pittsburgh |
| Villas of Arden Mills | Pennsylvania | Pittsburgh |
| The Village at Penn State | Pennsylvania | State College |
| Traditions of America at Liberty Hill | Pennsylvania | State College |
| Heritage Strasburg | Pennsylvania | Strasburg |
| Stonecroft Village | Pennsylvania | Womelsdorf |
| Greenleigh Condominiums at Regents Glen | Pennsylvania | York |
| Wakefield Meadows | Rhode Island | Kingston |
| Bay Ridge | Rhode Island | Newport |
| Ferry Landing | Rhode Island | Newport |
| The Villages on Mount Hope | Rhode Island | Newport |
| Laurelmead | Rhode Island | Providence |
| Champlin Woods and Winnapaug Cottages | Rhode Island | Westerly |
| Kalmia Landing | South Carolina | Aiken |
| Habersham | South Carolina | Beaufort |
| Palmetto Bluff | South Carolina | Bluffton |
| Sun City at Hilton Head | South Carolina | Bluffton |
| The Haven at New Riverside | South Carolina | Bluffton |
| Cane Bay Plantation | South Carolina | Charleston |
| Liberty Cottages at Park West | South Carolina | Charleston |
| Middleborough at Shadowmoss Plantation | South Carolina | Charleston |
| Southern Palms by JENSEN communities | South Carolina | Charleston |
| The Elms | South Carolina | Charleston |
| Lake Carolina | South Carolina | Columbia-SC |

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| Still Hopes Episcopal Retirement Community | South Carolina | Columbia-SC |
| Myrtle Trace | South Carolina | Conway |
| Myrtle Trace South | South Carolina | Conway |
| The Carolinian | South Carolina | Florence |
| Four Seasons at Gold Hill | South Carolina | Fort Mill |
| Sun City Carolina Lakes | South Carolina | Fort Mill |
| Ocean Pines and Magnolia Grove by JENSEN | South Carolina | Garden City Beach |
| Cascades Verdae | South Carolina | Greenville-SC |
| Rolling Green Village | South Carolina | Greenville-SC |
| Swansgate | South Carolina | Greenville-SC |
| The Woodlands At Furman | South Carolina | Greenville-SC |
| Wesley Commons | South Carolina | Greenwood |
| Tradition Hilton Head | South Carolina | Hardeeville |
| Cypress of Hilton Head island | South Carolina | Hilton Head |
| Indigo Pines | South Carolina | Hilton Head |
| Moss Creek | South Carolina | Hilton Head |
| TidePointe | South Carolina | Hilton Head |
| Edgewater - Golf and Lake Living Community | South Carolina | Lancaster |
| Saluda River Club | South Carolina | Lexington |
| Country Lakes by JENSEN communities | South Carolina | Little River |
| Inlet Oaks Village | South Carolina | Murrells Inlet |
| Seasons at Prince Creek West | South Carolina | Murrells Inlet |
| Berkshire Forest | South Carolina | Myrtle Beach |
| Carillon at Tuscany | South Carolina | Myrtle Beach |
| Cresswind at Myrtle Beach | South Carolina | Myrtle Beach |
| Grande Dunes | South Carolina | Myrtle Beach |
| Ocean Pines | South Carolina | Myrtle Beach |
| Withers Preserve | South Carolina | Myrtle Beach |
| Mount Vintage Plantation and Golf Club | South Carolina | North Augusta |
| Augusta Place at Laurel Creek | South Carolina | Rock Hill |
| Newport Lakes at Rock Hill | South Carolina | Rock Hill |
| Carnes Crossroad | South Carolina | Summerville |
| Cresswind at the Ponds | South Carolina | Summerville |
| Del Webb at Charleston | South Carolina | Summerville |
| The Pines at Gahagan | South Carolina | Summerville |
| Lake Ridge Greyrock | South Carolina | Tega Cay |
| The Pointe at Sunrise | South Dakota | Sioux Falls |
| Touchmark at All Saints | South Dakota | Sioux Falls |
| Trail Ridge Retirement Community | South Dakota | Sioux Falls |

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| Washington Crossing | South Dakota | Sioux Falls |
| Whispering Creek | South Dakota | Sioux Falls |
| Cottages at Feathers Chapel | Tennessee | Blountville |
| Alexian Grove | Tennessee | Chattanooga |
| River Hills Manor Apartments | Tennessee | Chattanooga |
| Savannah Crossings | Tennessee | Clarksville |
| Village at Schilling Farms | Tennessee | Collierville |
| Fairfield Glade basic | Tennessee | Crossville |
| Uplands Retirement Village | Tennessee | Crossville |
| The Manor at Steeplechase | Tennessee | Franklin TN |
| Tollgate Village | Tennessee | Franklin TN |
| Fairvue Plantation | Tennessee | Gallatin |
| Lenox Place | Tennessee | Gallatin |
| Willow Springs Reserve | Tennessee | Johnson City |
| Cottages at Pryse Farm | Tennessee | Knoxville |
| Harbor Crest at Douglas Lake | Tennessee | Knoxville |
| Ladd Landing | Tennessee | Knoxville |
| Sherrill Hills | Tennessee | Knoxville |
| Tennessee National | Tennessee | Loudon |
| Legends Manor at Royal Oaks | Tennessee | Maryville |
| Oaks at Woodchase | Tennessee | Memphis |
| Lake Providence by Del Webb | Tennessee | Mt Juliet |
| The Hearth at Hendersonville | Tennessee | Mt Juliet |
| The Village at Providence | Tennessee | Mt Juliet |
| Centennial Bluff | Tennessee | Oak Ridge |
| Alexian Village of Tennessee | Tennessee | Signal Mountain |
| Rarity Bay Waterfront Community | Tennessee | Vonore |
| Alamo Country Club | Texas | Alamo |
| Alamo Palms | Texas | Alamo |
| Casa del Valle RV Resort | Texas | Alamo |
| Avery Ranch | Texas | Austin |
| Longhorn Village | Texas | Austin |
| Overlook at Plum Creek | Texas | Austin |
| Querencia at Barton Creek | Texas | Austin |
| Steiner Ranch | Texas | Austin |
| The Conservatory at Wells Branch | Texas | Austin |
| The Reserve at Oak Ranch | Texas | Austin |
| Tuscan Village | Texas | Austin |
| Wildflower Terrace | Texas | Austin |

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| Cordillera Ranch | Texas | Boerne |
| Morningside Ministries at Menger Springs | Texas | Boerne |
| Arbor Oaks at Crest View | Texas | Bryan |
| Carriage Inn-Bryan | Texas | Bryan |
| King Oaks | Texas | College Station |
| Bonterra at Woodforest | Texas | Conroe |
| Carriage Inn Conroe | Texas | Conroe |
| Regency In The Forest | Texas | Conroe |
| Cinnamon Shore | Texas | Corpus Christi |
| Harbor Place | Texas | Corpus Christi |
| Arches Point at Parkside | Texas | DallasFort Worth |
| Avalon at Kessler Park | Texas | DallasFort Worth |
| Castle Hills | Texas | DallasFort Worth |
| CC Young Retirement Community | Texas | DallasFort Worth |
| Churchill Estates | Texas | DallasFort Worth |
| Edgemere | Texas | DallasFort Worth |
| Frisco Lakes | Texas | DallasFort Worth |
| Heritage Ranch | Texas | DallasFort Worth |
| Hillside West Senior Living | Texas | DallasFort Worth |
| HomeTowne at Matador Ranch | Texas | DallasFort Worth |
| Isabella Village at Savannah | Texas | DallasFort Worth |
| Lake Ridge at Joe Pool Lake | Texas | DallasFort Worth |
| Lakeside Manor | Texas | DallasFort Worth |
| Lewisville Estates | Texas | DallasFort Worth |
| Paloma Creek | Texas | DallasFort Worth |
| Providence | Texas | DallasFort Worth |
| Residence at the Oaks | Texas | DallasFort Worth |
| Retreat at Craig Ranch | Texas | DallasFort Worth |
| Robson Ranch Texas | Texas | DallasFort Worth |
| The Reserve at SugarTree | Texas | DallasFort Worth |
| The Resort on Eagle Mountain Lake | Texas | DallasFort Worth |
| The Village at Prestonwood | Texas | DallasFort Worth |
| The Villas on Bear Creek | Texas | DallasFort Worth |
| Villas by the Lake | Texas | DallasFort Worth |
| Watermere at Southlake | Texas | DallasFort Worth |
| Heritage Hill Country | Texas | Fredericksburg Texas |
| Village on the Park Friendswood | Texas | Friendswood |
| Georgetown Village | Texas | Georgetown-TX |

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| Heritage Oaks | Texas | Georgetown-TX |
| Oaks at Wildwood | Texas | Georgetown-TX |
| Sun City Texas | Texas | Georgetown-TX |
| Sun City-Texas | Texas | Georgetown-TX |
| South Colleyvine Ranch | Texas | Grapevine |
| Fun-N-Sun Resort | Texas | Harlingen |
| Palm Gardens RV Park | Texas | Harlingen |
| Tropic Winds Resort | Texas | Harlingen |
| Commons of Grace | Texas | Houston |
| Del Webb Sweetgrass | Texas | Houston |
| Eagles Trace Texas | Texas | Houston |
| Heritage Towne Lake | Texas | Houston |
| Kings Mill | Texas | Houston |
| The Gardens at Spring Shadows | Texas | Houston |
| Village on the Park Steeplechase | Texas | Houston |
| Villas in the Pines | Texas | Houston |
| Villas on Wood Forest | Texas | Houston |
| Carriage Inn Huntsville | Texas | Huntsville |
| Carriage Inn Katy | Texas | Katy |
| Heritage Grande at Cinco Ranch | Texas | Katy |
| South Padre Island Golf Community | Texas | Laguna Vista |
| Carriage Inn Jackson | Texas | Lake Jackson |
| Escapees CARE Center | Texas | Livingston |
| The Woods at Clayton Place | Texas | Longview |
| The Woods at PineCrest | Texas | Lufkin |
| Village of Stonewood | Texas | Lufkin |
| Fiesta Village | Texas | Mission |
| Retama Village Bentsen Palm | Texas | Mission |
| Sleepy Valley Resort | Texas | Mission |
| Lake Olympia | Texas | Missouri City |
| Quail Valley | Texas | Missouri City |
| Riverstone Active Community | Texas | Missouri City |
| Sienna Plantation | Texas | Missouri City |
| Austin Hills | Texas | Nacogdoches |
| Scenic Hills | Texas | New Braunfels |
| The Enclave at Westpointe Village | Texas | New Braunfels |
| Vintage Oaks | Texas | New Braunfels |
| Club Bellavita | Texas | Pearland |
| Stuart Place Country Club | Texas | Rio Grande Valley |

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| Victoria Palms Resort | Texas | Rio Grande Valley |
| Heritage at Vizcaya | Texas | Round Rock |
| Teravista | Texas | Round Rock |
| Rio Concho Communities | Texas | San Angelo |
| Air Force Villages | Texas | San Antonio |
| Del Webb Hill Country Retreat | Texas | San Antonio |
| Independence Hill Retirement Resort Community | Texas | San Antonio |
| Independence Village at Stone Oak | Texas | San Antonio |
| Midcrown Pavilion | Texas | San Antonio |
| Roseheart | Texas | San Antonio |
| The Alhambra Senior Apartments | Texas | San Antonio |
| The Lodge At Leon Springs | Texas | San Antonio |
| The Reserve at Hill Country Retreat | Texas | San Antonio |
| The Ridge at Sonoma Verde | Texas | San Antonio |
| The Towers on Park Lane | Texas | San Antonio |
| Conservatory Senior Living | Texas | The Woodlands |
| East Shore | Texas | The Woodlands |
| Village at Woodlands Waterway | Texas | The Woodlands |
| Windsor Hills | Texas | The Woodlands |
| Windsor Lakes | Texas | The Woodlands |
| Leisure World RV Resort | Texas | Weslaco |
| Llano Grande Lake Park Resort | Texas | Weslaco |
| Snow to Sun | Texas | Weslaco |
| Trails End RV Resort | Texas | Weslaco |
| Crescent Heights | Utah | Cedar City |
| Brookhaven Villas | Utah | Lehi |
| The Gardens At Ivory Ridge | Utah | Lehi |
| Springbrook Villas | Utah | Lehi |
| Stirling Pointe | Utah | Lehi |
| Whisper Rock | Utah | Lehi |
| Willow Park Villas | Utah | Lehi |
| Towne Center Villas | Utah | Logan |
| Harrison Regent | Utah | Ogden |
| Westwood Village | Utah | Ogden |
| Hideout Canyon | Utah | Park City |
| Cove Point | Utah | Provo |
| Heritage Village Utah | Utah | Provo |
| All Seasons | Utah | Salt Lake City |
| Bella Vida at Englewood | Utah | Salt Lake City |

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| Bridlewood Villas | Utah | Salt Lake City |
| Garden Park at Daybreak | Utah | Salt Lake City |
| Parklane Apartments | Utah | Salt Lake City |
| Sagewood at Daybreak | Utah | Salt Lake City |
| South Towne Ranch | Utah | Salt Lake City |
| Summit Vista | Utah | Salt Lake City |
| Brio | Utah | ST GEORGE |
| Palms RV Resort | Utah | ST GEORGE |
| Sunbrook | Utah | ST GEORGE |
| SunRiver St. George | Utah | ST GEORGE |
| Coral Canyon | Utah | Washington |
| Ethan Allen Residence | Vermont | Burlington |
| Shelburne Bay | Vermont | Burlington |
| Wake Robin | Vermont | Burlington |
| Equinox Village | Vermont | Manchester Center |
| Eastview at Middlebury | Vermont | Middlebury |
| Lodge at Otter Creek | Vermont | Middlebury |
| Wynnmere | Vermont | Rutland Town |
| Goodwin House | Virginia | Alexandria |
| Greenspring | Virginia | Alexandria |
| Hermitage | Virginia | Alexandria |
| The Fountains at Washington House | Virginia | Alexandria |
| Potomac Green Del Webb | Virginia | Ashburn |
| WoodsEdge | Virginia | Blacksburg |
| Branchlands | Virginia | Charlottesville |
| Fontana | Virginia | Charlottesville |
| Four Seasons Charlottesville | Virginia | Charlottesville |
| Belle Air Village | Virginia | Fredericksburg |
| Falls Run | Virginia | Fredericksburg |
| Rosewood Village | Virginia | Fredericksburg |
| The Evergreens at Smith Run | Virginia | Fredericksburg |
| The Evergreens at Smith Run | Virginia | Fredericksburg |
| Heritage Hunt Golf and Country Club | Virginia | Gainesville-VA |
| Regency at Dominion Valley | Virginia | Gainesville-VA |
| CrossRidge | Virginia | Glen Allen |
| Ladysmith Village | Virginia | Glen Allen |
| Verena at Virginia Center | Virginia | Glen Allen |
| Four Seasons At Ashburn Village | Virginia | Leesburg |
| Leisure World of Virginia | Virginia | Leesburg |

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| New Eco Equine Village | Virginia | Leesburg |
| The Villages at Broadlands | Virginia | Leesburg |
| Glenbrooke in Boonsboro | Virginia | Lynchburg |
| Dunbarton | Virginia | Manassas |
| Gatherings At Wellington | Virginia | Manassas |
| Liberty Grove | Virginia | Manassas |
| Oaks of Wellington | Virginia | Manassas |
| King's Grant | Virginia | Martinsville |
| Four Seasons at New Kent Vineyards | Virginia | New Kent |
| Church Square | Virginia | Newport News |
| Warwick Forest Retirement Community | Virginia | Newport News |
| Eagle Point at Cahoon Plantation | Virginia | Norfolk |
| First Colonial Inn | Virginia | Norfolk |
| Harbors Edge | Virginia | Norfolk |
| West Neck Villages | Virginia | Norfolk |
| Tinsley Charter | Virginia | PRINCE GEORGE |
| West Market | Virginia | Reston |
| Brandermill Woods | Virginia | Richmond |
| Heritage Oaks Retirement Community | Virginia | Richmond |
| Rock Creek Villas | Virginia | Richmond |
| The Villas at Magnolia Lakes | Virginia | Richmond |
| Colonial Heritage | Virginia | Williamsburg |
| New Town | Virginia | Williamsburg |
| The Settlement at Powhatan Creek | Virginia | Williamsburg |
| Verena at The Reserve | Virginia | Williamsburg |
| Villa at Five Forks | Virginia | Williamsburg |
| Villas at Yorktown | Virginia | Williamsburg |
| Cedar Meadows | Virginia | Winchester VA |
| Shenandoah Active Adult Community | Virginia | Winchester VA |
| The Village at Harvest Ridge | Virginia | Winchester VA |
| The Willows At Meadow Branch | Virginia | Winchester VA |
| Trilogy at Lake Fredrick | Virginia | Winchester VA |
| Village At Orchard Ridge | Virginia | Winchester VA |
| Four Seasons at Historic Virginia | Virginia | Woodbridge |
| Potomac Shores | Virginia | Woodbridge |
| Westminster at Lake Ridge | Virginia | Woodbridge |
| Montreaux | Washington | Anacortes |
| Shea Homes at Jubilee | Washington | Anacortes |
| Center Village | Washington | Bellevue |

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| Pacific Regent Bellevue | Washington | Bellevue |
| Silver Glen | Washington | Bellevue |
| The Garden Club | Washington | Bellevue |
| Timber Ridge at Talus | Washington | Bellevue |
| Big Fir | Washington | Bellingham |
| The Willows | Washington | Bellingham |
| Stillwaters Estates | Washington | Centralia |
| Saratoga | Washington | Edmonds |
| Vintage at Everett | Washington | Edmonds |
| Rosewood Adult Living | Washington | Ellensburg |
| Lakeview Meadows | Washington | Lacey |
| Laurel Oaks | Washington | Lacey |
| Panorama | Washington | Lacey |
| Oyhut Bay | Washington | Ocean Shores |
| Seabrook | Washington | Ocean Shores |
| Affinity at Olympia | Washington | Olympia |
| Patriots Landing | Washington | Olympia |
| Silver Leaf Residences | Washington | Olympia |
| The Firs | Washington | Olympia |
| Yauger Park Villas | Washington | Olympia |
| The Orchards on Fourteenth | Washington | Port Angeles |
| Viking Park | Washington | Poulsbo |
| Cascara at the Villages | Washington | Redmond |
| Emerald Heights | Washington | Redmond |
| Reunion at Redmond Ridge | Washington | Redmond |
| Trilogy at Redmond Ridge | Washington | Redmond |
| Arrowhead Gardens | Washington | Seattle |
| Bayview Retirement Community | Washington | Seattle |
| Bow Lake | Washington | Seattle |
| Exeter House | Washington | Seattle |
| High Point | Washington | Seattle |
| Horizon House | Washington | Seattle |
| Kloshe Illahee | Washington | Seattle |
| Merrill Gardens at University Village | Washington | Seattle |
| Mirabella Seattle | Washington | Seattle |
| Park Shore | Washington | Seattle |
| Pinewood Villa | Washington | Seattle |
| Providence Point | Washington | Seattle |
| Skyline at First Hill | Washington | Seattle |

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| The Hearthstone | Washington | Seattle |
| Sherwood Assisted Living | Washington | Sequim |
| Solana | Washington | Sequim |
| Affinity at Mill Road | Washington | Spokane |
| Broadway Court Estates | Washington | Spokane |
| Harvard Park | Washington | Spokane |
| Spring Ridge Estates | Washington | Spokane |
| Sundance Meadows Adult Community | Washington | Spokane |
| Touchmark at Grapetree | Washington | Spokane |
| Touchmark at Spokane | Washington | Spokane |
| Touchmark on South Hill | Washington | Spokane |
| Azalea Gardens | Washington | Tacoma |
| Belmor Park Golf and Country Club | Washington | Tacoma |
| Norpoint Village | Washington | Tacoma |
| Pantera Lago | Washington | Tacoma |
| Peninsula | Washington | Tacoma |
| Tehaleh | Washington | Tacoma |
| The Cottages at Peach Creek | Washington | Tacoma |
| The Highlands at South Hill | Washington | Tacoma |
| The Lodge at Mallards Landing | Washington | Tacoma |
| Trilogy at Tehaleh | Washington | Tacoma |
| Village Green Retirement Campus | Washington | Tacoma |
| Eagles Landing | Washington | Tumwater |
| Courtyard Village Vancouver | Washington | Vancouver |
| Fairway Village-Vancouver | Washington | Vancouver |
| Highgate Senior Living | Washington | Vancouver |
| Villas at Salmon Creek | Washington | Vancouver |
| Affinity At Walla Walla | Washington | Walla Walla |
| Galbraith Gardens | Washington | Walla Walla |
| Quail Run Retirement Community | Washington | Walla Walla |
| Wheatland Village | Washington | Walla Walla |
| Oakmont at Fairway Point | Washington | Whidbey Island |
| The Villas at Terrace Heights | Washington | Yakima |
| Uptown Retirement Court | Washington | Yakima |
| Yakima Quail Run | Washington | Yakima |
| Chesnut Oaks | Washington D.C. | Washington |
| Riderwood CCRC | Washington D.C. | Washington |

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| The Overlook at Oxon Run | Washington D.C. | Washington |
| Emeritus at Maplewood | West Virginia | Morgantown |
| Touchmark on West Prospect | Wisconsin | Green Bay |
| Capitol Lakes | Wisconsin | Madison (WI) |
| Middleton Glen | Wisconsin | Madison (WI) |
| Mission Lakes | Wisconsin | Milwaukee |
| Rainbow Lake Manor | Wisconsin | Milwaukee |
| Whispering Chase | Wyoming | Cheyenne |

Traditional Neighborhood Development (TND) Survey

Welcome to the Survey

You are invited to take part in a 13 question research study about barriers and promoters real estate developers face in building traditional neighborhood developments. The researcher is inviting real estate developers who have an interest in, or have developed TNDs. This first page form is part of a process called "informed consent" to allow you to understand this study before deciding whether to take part.

This study, titled "Where One Lives Matters: How Plans, Finance and Zoning Policies Impact What Developers Choose to Build," is being conducted by a researcher named Michele A. Williams, who is a doctoral student at Walden University in the Public Policy and Administration program.

Background Information:

The purpose of this study is to explore the degree to which comprehensive plans, finance and zoning policies predict the likelihood that real estate developers will build certain types of communities in the United States.

Procedures:

If you agree to be in this study, you will be asked to complete one online 13 question survey that should take no more than 45 minutes.

Here are some sample questions:

1. To what extent does fast tracking permitting processes for more sustainable development encourage you to develop a TND?
 Not at all Slightly influential Somewhat influential Very influential Extremely influential No opinion
2. To what extent does the requirement to conform with LEED-ND standards encourage you to develop a TND?
 Not at all Slightly influential Somewhat influential Very influential Extremely influential No opinion
3. To what extent does an adjacent transit station encourage you to develop a TND?
 Not at all Slightly influential Somewhat influential Very influential Extremely influential No opinion

Voluntary Nature of the Study:

This study is voluntary. Everyone will respect your decision of whether or not you choose to be in the study. You will not be treated differently if you decide not to be in the study. If you decide not to join the study now, you can still change your mind later. You may stop at any time and are free to decline to answer any particular topical question you do not wish to answer for any reason.

Risks and Benefits of Being in the Study :

Being in this type of study involves some risk of the minor discomforts that can be encountered in daily life, such as fatigue and stress caused as you think about your experience. Being in this study would not pose risk to your safety or wellbeing.

Although no benefits accrue to you for answering the survey, but your responses will be used to help policy makers understand how real estate development policies may help or hinder population health. The results of the research will happily be shared with you, as you may find benefit in knowing more about the topic.

Payment:

There is no payment or reimbursements that will be provided to you.

Privacy:

Any information you provide will be kept confidential. The researcher will not use your personal information for any purposes outside of this research project. Also, the researcher will not include your name or anything else that could identify you in the study reports.

Your survey answers will be sent to a link at SurveyMonkey.com where data will be stored in a password protected electronic format. SurveyMonkey, as a company, does not use their servers to collect identifying information such as your name, email address, or IP address. Therefore, your responses will remain anonymous to the company SurveyMonkey. The only one will be able to identify you or your answers, or know whether or not you participated in the study is the researcher. Data will be kept secure by storing it in a password protected electronic format. SurveyMonkey's privacy policy can be found [here](#).

Data will be kept for a period of at least 5 years, as required by the university.

Contacts and Questions:

You may ask any questions you have now. Or if you have questions later, you may contact the researcher via email at Michele.williams5@waldenu.edu or 302-827-3575. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you.

Traditional Neighborhood Development (TND) Survey**Consent Form**

* 1. If you wish to participate in the research study, please indicate that you agree to participate by clicking on the "Agree" button:

- Agree
 Disagree

* 2. In order to establish that you are eligible to participate in this study, please confirm yes or no to the following:

| | Response |
|--|----------------------|
| Can you read and speak English so that you can understand the study well enough to make a decision about participating in the study? | <input type="text"/> |
| Are you 18 years of age or older? | <input type="text"/> |
| Do you have access to the internet and email? | <input type="text"/> |

* 3. Were you involved in decision making processes in the development of a TDN?

- Yes
 No

* 4. The questions that follow focus on some of the supporting and inhibiting policies of real estate development. Are you able to provide answers to questions about the planning, designing, marketing, and/or involvement with town/city/county committees in the development of your TND?

- Yes
 No

Other (please specify)

Traditional Neighborhood Development (TND) Survey

5. To what extent do the following factors ENCOURAGE you to develop an Age-Restricted Active Communities:

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Fast track permitting processes for more sustainable development | <input type="radio"/> |
| The requirement to conform with LEED-ND standards | <input type="radio"/> |
| A significant amount of new real estate investment underway in area or near site | <input type="radio"/> |
| An adjacent transit station | <input type="radio"/> |
| Brownfield issues (<i>abandoned or underused properties where redevelopment is complicated by actual or perceived environmental contamination</i>) | <input type="radio"/> |
| The government and their lenders absorb most of the risk should a real estate venture fail | <input type="radio"/> |
| The availability of tax incentives | <input type="radio"/> |
| Reduced parking requirements | <input type="radio"/> |
| The ability to build some units without on-site parking | <input type="radio"/> |
| Car sharing programs available in area of development | <input type="radio"/> |
| The availability of location-efficient mortgages (<i>increases the amount of money homebuyers in urban areas are able to borrow by taking into account the money they save in "walkable" areas</i>) | <input type="radio"/> |

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Potential rent premiums for superior locations/access | <input type="radio"/> |
| The ability to market benefits related to walking | <input type="radio"/> |
| The ability to market benefits related to bicycling | <input type="radio"/> |
| The ability to market benefits related to health | <input type="radio"/> |
| The ability to market benefits related to reduced car use | <input type="radio"/> |
| Reduced clearing and grading costs | <input type="radio"/> |
| Potentially reduced infrastructure costs (streets, curbs, gutters, sidewalks) | <input type="radio"/> |
| Reduced storm water management costs | <input type="radio"/> |
| Reduced impact fees and increased lot yields | <input type="radio"/> |
| Increased marketability of properties | <input type="radio"/> |
| Preserved existing vegetation | <input type="radio"/> |
| Density bonuses | <input type="radio"/> |
| Incentives for below market rate units | <input type="radio"/> |
| Meeting other specified goals for land envelopment (e.g., aesthetics, open space, parks, or buffers) | <input type="radio"/> |
| Subjection to form-based codes (a zoning code is designed to regulate development to achieve a specific urban form oriented toward pedestrian-friendly design) | <input type="radio"/> |

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|-----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Regulations allowing grid-streets | <input type="radio"/> |

Age-Restricted Active Community Development Survey October 16

PREVENT or DISCOURAGE AGE RESTRICTED ACTIVE COMMUNITIES

6. To what extent do the following factors PREVENT or DISCOURAGE you to develop Age-Restricted Active Communities:

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| NIMBY (not in my back yard) | <input type="radio"/> |
| Resistance to density increases | <input type="radio"/> |
| Lack of political support | <input type="radio"/> |
| The inability to overcome governmental/political hurdles | <input type="radio"/> |
| The inability of government agencies to work together | <input type="radio"/> |
| The lack of experience with Age-Restricted Active Communities within my company | <input type="radio"/> |
| The lack of experience with Age-Restricted Active Communities in local community development | <input type="radio"/> |
| The public sector participation in development plans | <input type="radio"/> |
| The lack of market demand | <input type="radio"/> |
| The lack of lender familiarity with Age-Restricted Active Communities | <input type="radio"/> |

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Lender policies that do not recognize or value mixed-use | <input type="radio"/> |
| Gas/fuel prices for construction activities | <input type="radio"/> |
| The cost of sidewalks and intersection treatments | <input type="radio"/> |
| Financing for integrated, mixed-use development (commercial and residential) | <input type="radio"/> |
| Inadequate transit services | <input type="radio"/> |
| Affordable housing requirements | <input type="radio"/> |
| Automobile oriented land-use policies | <input type="radio"/> |
| Regulations requiring cul-de-sacs, large lots, large setback, wide streets, and separation of uses | <input type="radio"/> |
| Minimum parking requirements | <input type="radio"/> |

Age-Restricted Active Community Development Survey October 16

Background-Tell us about you!

7. Please indicate your **primary** business occupation. Please select only *one option*.

- Builder
- Remodeler
- Land Developer
- Subcontractor
- Architect/Designer
- Industry Product Manufacturer/Service Provider
- Industry Dealer/Distributor/Supplier

Other (please specify)

8. How many years have you been working in this field?

- 1-5 years
- 6-10 years
- 11-15 years
- 16-20 years
- 21-25 years
- over 25 years

9. In what state is your company located?

Other (please specify)

10. Where does your company primarily develop?

- Develop only in this state indicated in previous question
- Develop only in the local area surrounding the company office:
- Develop in multiple states (please select the states in next question):

11. If your company develops in multiple states, please indicate the states:

- | | | |
|--|--|--|
| <input type="checkbox"/> AL Alabama | <input type="checkbox"/> KY Kentucky | <input type="checkbox"/> ND North Dakota |
| <input type="checkbox"/> AK Alaska | <input type="checkbox"/> LA Louisiana | <input type="checkbox"/> OH Ohio |
| <input type="checkbox"/> AZ Arizona | <input type="checkbox"/> ME Maine | <input type="checkbox"/> OK Oklahoma |
| <input type="checkbox"/> AR Arkansas | <input type="checkbox"/> MD Maryland | <input type="checkbox"/> OR Oregon |
| <input type="checkbox"/> CA California | <input type="checkbox"/> MA Massachusetts | <input type="checkbox"/> PA Pennsylvania |
| <input type="checkbox"/> CO Colorado | <input type="checkbox"/> MI Michigan | <input type="checkbox"/> RI Rhode Island |
| <input type="checkbox"/> CT Connecticut | <input type="checkbox"/> MN Minnesota | <input type="checkbox"/> SC South Carolina |
| <input type="checkbox"/> DE Delaware | <input type="checkbox"/> MS Mississippi | <input type="checkbox"/> SD South Dakota |
| <input type="checkbox"/> DC District of Columbia | <input type="checkbox"/> MO Missouri | <input type="checkbox"/> TN Tennessee |
| <input type="checkbox"/> FL Florida | <input type="checkbox"/> MT Montana | <input type="checkbox"/> TX Texas |
| <input type="checkbox"/> GA Georgia | <input type="checkbox"/> NE Nebraska | <input type="checkbox"/> UT Utah |
| <input type="checkbox"/> HI Hawaii | <input type="checkbox"/> NV Nevada | <input type="checkbox"/> VT Vermont |
| <input type="checkbox"/> ID Idaho | <input type="checkbox"/> NH New Hampshire | <input type="checkbox"/> VA Virginia |
| <input type="checkbox"/> IL Illinois | <input type="checkbox"/> NJ New Jersey | <input type="checkbox"/> WA Washington |
| <input type="checkbox"/> IN Indiana | <input type="checkbox"/> NM New Mexico | <input type="checkbox"/> WV West Virginia |
| <input type="checkbox"/> IA Iowa | <input type="checkbox"/> NY New York | <input type="checkbox"/> WI Wisconsin |
| <input type="checkbox"/> KS Kansas | <input type="checkbox"/> NC North Carolina | <input type="checkbox"/> WY Wyoming |
| <input type="checkbox"/> Other (please specify) | | |

12. What is the main type of housing your company sells/develops? (check all that apply)

- Detached single-family residences
- Duplex, triplex, quad single family residences
- Townhouses, row houses, apartments or condos of 2-3 stories
- Mix of single-family residences and townhouses, row houses, apartments or condos
- Apartments or condos of 4-12 stories
- Apartments or condos of more than 12 stories
- Tiny houses
- Mobile homes/parks

Other (please specify)

13. What type of development does the agency/company that you work for most commonly develop?

Check all that apply.

- Build new houses in outlying areas
- Build new homes in existing, partially developed suburban areas
- Build new homes on vacant land in the central city or inner suburbs
- Develop/remodel existing homes and neighborhoods (infill development)
- Commercial building retrofitting
- Develop homes as part of TNDs

Other (please specify)

Traditional Neighborhood Development (TND) Survey

Thank you!

Thank you for completing this survey. I sincerely appreciate your time in providing me with valuable information. If you have additional comments or questions, or would like a copy of my summary results of my study once it is published, do not hesitate to contact me at michele.williams5@waldenu.edu or 302-827-3575.

Appendix N: Survey Instrument for Survey Monkey: Age Restricted Active Communities

Age-Restricted Active Community Development Survey October 16

Welcome to the Survey

You are invited to take part in a research study about barriers and promoters real estate developers face in building Age-Restricted Active Community Developers. The researcher is inviting real estate developers whose Age-Restricted Active Community Developers are listed on www.TopRetirements.com. The researcher obtained your name/contact information via a Google Internet Search. This form is part of a process called "informed consent" to allow you to understand this study before deciding whether to take part.

This study is being conducted by a researcher named Michele A. Williams, who is a doctoral student at Walden University in the Public Policy and Administration program

Background Information:

The purpose of this study is to explore the degree to which comprehensive plans, finance and zoning policies predict the likelihood that real estate developers will build certain types of communities in the United States.

Procedures:

If you agree to be in this study, you will be asked to complete one online survey that should take no more than 45 minutes.

Here are some sample questions:

1. To what extent does fast tracking permitting processes for more sustainable development encourage you to develop a Age-Restricted Active Community?

Not at all Slightly influential Somewhat influential Very influential Extremely influential No opinion

2. To what extent does the requirement to conform with LEED-ND standards encourage you to develop a Age-Restricted Active Community?

Not at all Slightly influential Somewhat influential Very influential Extremely influential No opinion

3. To what extent does an adjacent transit station encourage you to develop a Age-Restricted Active Community?

Not at all Slightly influential Somewhat influential Very influential Extremely influential No opinion

Voluntary Nature of the Study:

This study is voluntary. Everyone will respect your decision of whether or not you choose to be in the study. You will not be treated differently if you decide not to be in the study. If you decide not to join the study now, you can still change your mind later. You may stop at any time and are free to decline to answer any particular topical question you do not wish to answer for any reason.

Risks and Benefits of Being in the Study :

Being in this type of study involves some risk of the minor discomforts that can be encountered in daily life, such as fatigue and stress caused as you think about your experience. Being in this study would not pose risk to your safety or wellbeing.

Although no benefits accrue to you for answering the survey, but your responses will be used to help policy makers understand how real estate development policies may help or hinder population health. The results of the research will happily be shared with you, as you may find benefit in knowing more about the topic.

Payment:

There is no payment or reimbursements that will be provided to you.

Privacy:

Any information you provide will be kept confidential. The researcher will not use your personal information for any purposes outside of this research project. Also, the researcher will not include your name or anything else that could identify you in the study reports.

Your survey answers will be sent to a link at SurveyMonkey.com where data will be stored in a password protected electronic format. SurveyMonkey, as a company, does not use their servers to collect identifying information such as your name, email address, or IP address. Therefore, your responses will remain anonymous to the company SurveyMonkey. The only one will be able to identify you or your answers, or know whether or not you participated in the study is the researcher. Data will be kept secure by storing it in a password protected electronic format. SurveyMonkey's privacy policy can be found [here](#).

Data will be kept for a period of at least 5 years, as required by the university.

Contacts and Questions:

You may ask any questions you have now. Or if you have questions later, you may contact the researcher via email at Michele.williams5@waldenu.edu or 302-827-3575. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. Sh

* 1. If you wish to participate in the research study, please indicate that you agree to participate by clicking on the "Agree" button:

- Agree
 Disagree

* 2. In order to establish that you are eligible to participate in this study, please confirm yes or no to the following:

| | Response |
|--|----------------------|
| Can you read and speak English so that you can understand the study well enough to make a decision about participating in the study? | <input type="text"/> |
| Are you 18 years of age or older? | <input type="text"/> |
| Do you have access to the internet and email? | <input type="text"/> |

* 3. Were you involved in decision making processes in the development of an Age-Restricted Active Community?

- Yes
 No

* 4. The questions that follow focus on some of the supporting and inhibiting policies of real estate development. Are you able to provide answers to questions about the planning, designing, marketing, and/or involvement with town/city/county committees in the development of your Age-Restricted Active Community?

- Yes
 No

Other (please specify)

Age-Restricted Active Community Development Survey October 16

ENCOURAGE AGE-RESTRICTED ACTIVE COMMUNITIES

5. To what extent do the following factors ENCOURAGE you to develop an Age-Restricted Active Communities:

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Fast track permitting processes for more sustainable development | <input type="radio"/> |
| The requirement to conform with LEED-ND standards | <input type="radio"/> |
| A significant amount of new real estate investment underway in area or near site | <input type="radio"/> |
| An adjacent transit station | <input type="radio"/> |
| Brownfield issues (<i>abandoned or underused properties where redevelopment is complicated by actual or perceived environmental contamination</i>) | <input type="radio"/> |
| The government and their lenders absorb most of the risk should a real estate venture fail | <input type="radio"/> |
| The availability of tax incentives | <input type="radio"/> |
| Reduced parking requirements | <input type="radio"/> |
| The ability to build some units without on-site parking | <input type="radio"/> |
| Car sharing programs available in area of development | <input type="radio"/> |
| The availability of location-efficient mortgages (<i>increases the amount of money homebuyers in urban areas are able to borrow by taking into account the money they save in "walkable" areas</i>) | <input type="radio"/> |

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Potential rent premiums for superior locations/access | <input type="radio"/> |
| The ability to market benefits related to walking | <input type="radio"/> |
| The ability to market benefits related to bicycling | <input type="radio"/> |
| The ability to market benefits related to health | <input type="radio"/> |
| The ability to market benefits related to reduced car use | <input type="radio"/> |
| Reduced clearing and grading costs | <input type="radio"/> |
| Potentially reduced infrastructure costs (streets, curbs, gutters, sidewalks) | <input type="radio"/> |
| Reduced storm water management costs | <input type="radio"/> |
| Reduced impact fees and increased lot yields | <input type="radio"/> |
| Increased marketability of properties | <input type="radio"/> |
| Preserved existing vegetation | <input type="radio"/> |
| Density bonuses | <input type="radio"/> |
| Incentives for below market rate units | <input type="radio"/> |
| Meeting other specified goals for land envelopment (e.g., aesthetics, open space, parks, or buffers) | <input type="radio"/> |
| Subjection to form-based codes (a zoning code is designed to regulate development to achieve a specific urban form oriented toward pedestrian-friendly design) | <input type="radio"/> |

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|-----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Regulations allowing grid-streets | <input type="radio"/> |

Age-Restricted Active Community Development Survey October 16

PREVENT or DISCOURAGE AGE RESTRICTED ACTIVE COMMUNITIES

6. To what extent do the following factors PREVENT or DISCOURAGE you to develop Age-Restricted Active Communities:

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| NIMBY (not in my back yard) | <input type="radio"/> |
| Resistance to density increases | <input type="radio"/> |
| Lack of political support | <input type="radio"/> |
| The inability to overcome governmental/political hurdles | <input type="radio"/> |
| The inability of government agencies to work together | <input type="radio"/> |
| The lack of experience with Age-Restricted Active Communities within my company | <input type="radio"/> |
| The lack of experience with Age-Restricted Active Communities in local community development | <input type="radio"/> |
| The public sector participation in development plans | <input type="radio"/> |
| The lack of market demand | <input type="radio"/> |
| The lack of lender familiarity with Age-Restricted Active Communities | <input type="radio"/> |

| | Not at all | Slightly influential | Somewhat influential | Very influential | Extremely influential | No opinion/Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|
| Lender policies that do not recognize or value mixed-use | <input type="radio"/> |
| Gas/fuel prices for construction activities | <input type="radio"/> |
| The cost of sidewalks and intersection treatments | <input type="radio"/> |
| Financing for integrated, mixed-use development (commercial and residential) | <input type="radio"/> |
| Inadequate transit services | <input type="radio"/> |
| Affordable housing requirements | <input type="radio"/> |
| Automobile oriented land-use policies | <input type="radio"/> |
| Regulations requiring cul-de-sacs, large lots, large setback, wide streets, and separation of uses | <input type="radio"/> |
| Minimum parking requirements | <input type="radio"/> |

Age-Restricted Active Community Development Survey October 16

Background-Tell us about you!

7. Please indicate your **primary** business occupation. Please select only *one option*.

- Builder
- Remodeler
- Land Developer
- Subcontractor
- Architect/Designer
- Industry Product Manufacturer/Service Provider
- Industry Dealer/Distributor/Supplier

Other (please specify)

8. How many years have you been working in this field?

- 1-5 years
- 6-10 years
- 11-15 years
- 16-20 years
- 21-25 years
- over 25 years

9. In what state is your company located?

Other (please specify)

10. Where does your company primarily develop?

- Develop only in this state indicated in previous question
- Develop only in the local area surrounding the company office:
- Develop in multiple states (please select the states in next question):

11. If your company develops in multiple states, please indicate the states:

- | | | |
|--|--|--|
| <input type="checkbox"/> AL Alabama | <input type="checkbox"/> KY Kentucky | <input type="checkbox"/> ND North Dakota |
| <input type="checkbox"/> AK Alaska | <input type="checkbox"/> LA Louisiana | <input type="checkbox"/> OH Ohio |
| <input type="checkbox"/> AZ Arizona | <input type="checkbox"/> ME Maine | <input type="checkbox"/> OK Oklahoma |
| <input type="checkbox"/> AR Arkansas | <input type="checkbox"/> MD Maryland | <input type="checkbox"/> OR Oregon |
| <input type="checkbox"/> CA California | <input type="checkbox"/> MA Massachusetts | <input type="checkbox"/> PA Pennsylvania |
| <input type="checkbox"/> CO Colorado | <input type="checkbox"/> MI Michigan | <input type="checkbox"/> RI Rhode Island |
| <input type="checkbox"/> CT Connecticut | <input type="checkbox"/> MN Minnesota | <input type="checkbox"/> SC South Carolina |
| <input type="checkbox"/> DE Delaware | <input type="checkbox"/> MS Mississippi | <input type="checkbox"/> SD South Dakota |
| <input type="checkbox"/> DC District of Columbia | <input type="checkbox"/> MO Missouri | <input type="checkbox"/> TN Tennessee |
| <input type="checkbox"/> FL Florida | <input type="checkbox"/> MT Montana | <input type="checkbox"/> TX Texas |
| <input type="checkbox"/> GA Georgia | <input type="checkbox"/> NE Nebraska | <input type="checkbox"/> UT Utah |
| <input type="checkbox"/> HI Hawaii | <input type="checkbox"/> NV Nevada | <input type="checkbox"/> VT Vermont |
| <input type="checkbox"/> ID Idaho | <input type="checkbox"/> NH New Hampshire | <input type="checkbox"/> VA Virginia |
| <input type="checkbox"/> IL Illinois | <input type="checkbox"/> NJ New Jersey | <input type="checkbox"/> WA Washington |
| <input type="checkbox"/> IN Indiana | <input type="checkbox"/> NM New Mexico | <input type="checkbox"/> WV West Virginia |
| <input type="checkbox"/> IA Iowa | <input type="checkbox"/> NY New York | <input type="checkbox"/> WI Wisconsin |
| <input type="checkbox"/> KS Kansas | <input type="checkbox"/> NC North Carolina | <input type="checkbox"/> WY Wyoming |
| <input type="checkbox"/> Other (please specify) | | |

12. What is the main type of housing your company sells/develops? (check all that apply)

- Detached single-family residences
- Duplex, triplex, quad single family residences
- Townhouses, row houses, apartments or condos of 2-3 stories
- Mix of single-family residences and townhouses, row houses, apartments or condos
- Apartments or condos of 4-12 stories
- Apartments or condos of more than 12 stories
- Tiny houses
- Mobile homes/parks

Other (please specify)

13. What type of development does the agency/company that you work for most commonly develop?

Check all that apply.

- Build new houses in outlying areas
- Build new homes in existing, partially developed suburban areas
- Build new homes on vacant land in the central city or inner suburbs
- Develop/remodel existing homes and neighborhoods (infill development)
- Commercial building retrofitting
- Develop homes as part of Age-Restricted Active Communities
- Develop homes as part of Retirement Communities

Other (please specify)

Age-Restricted Active Community Development Survey October 16

Thank you!

Thank you for completing this survey. I sincerely appreciate your time in providing me with valuable information. If you have additional comments or questions, or would like a copy of my summary results of my study once it is published, do not hesitate to contact me at michele.williams5@waldenu.edu or 302-827-3575.

Appendix O: Permission Letter for use of PRC tool

From: Valko, Cheryl
Sent: Tuesday, September 22, 2015 9:42 AM
To: Linda Dix (ldix@wustl.edu)
Subject: FW: Permission to use survey tool and update on study

Michelle,

You are welcome to use them. The update on the SHIFT study is that we were unable to obtain a large enough sample to publish results at this time. The realtor survey is published on the PRC website right below the SHIFT survey tool and the results of that study are published in the article you referenced.

Linda S Dix

Administrative Coordinator/Assistant to Dr. Ross Brownson
Prevention Research Center in St. Louis
Campus Box 1196
One Brookings Drive, St. Louis, MO 63130-4838
[O] 314.935.0121 [E] ldix@wustl.edu
PRC in St. Louis @StLouisPRC

from: Michele Williams <michele.williams5@waldenu.edu>

to: prcstl@wustl.edu, ldix@wustl.edu

date: Tue, Sep 22, 2015 at 8:46 AM

subject: Permission to use survey tool and update on study

Hello,

I am a doctoral student from Walden University writing my dissertation tentatively titled "Where One Lives Matters: A Quantitative Study Correlating Policy and Health" under the direction of my dissertation committee chaired by Dr. Anne Hacker. My dissertation examines barriers and challenges for new urbanism real estate developers face in building healthy (complete) communities.

I'm interested in obtaining permission to use the survey tool

(<http://prcstl.wustl.edu/ResearchAndFindings/Pages/SHIFT.aspx>) used in the SHIFT Study, and an update on this study if there is one.

Also, Cheryl Carnoske and team may have used another tool for their research published in "Developer and Realtor Perspectives on Factors That Influence Development, Sale, and Perceived Demand for Activity-Friendly Communities " that was published in Journal of Physical Activity and Health, March 20107(0 1): S48–S59. If a different tool was used, I'd like to have a copy of that as well as permission to use.

I would like to possibly use some of the questions from your interview under the following conditions:

- I will not use this survey only for my research study and will not sell or use it with any compensated or curriculum development activities.
- I will include the copyright statement on all copies of the instrument.
- I will only use questions that directly relate to my research questions.
- I will send my research study and one copy of reports, articles, and the like that make use of these survey data promptly to your attention.

Please let me know if and how this request can be made possible. I'd also appreciate any other guidance that you may have in obtaining other survey tools that focus on real estate developers, planners, and/or investors that are focused on smart growth. I appreciate in advance your consideration.

Warm Regards,

Michele A. Williams
Doctoral Candidate



Public Policy and Administration, Health Policy Specialty
Walden University



Appendix P: Mapped Variables to Original SHIFT Survey

| Original Survey question from SHIFT | Mapped to | Independent Variable |
|---|-----------|----------------------|
| Encourage to build | | |
| Flexible Development Regulations | | |
| To what extent does density bonuses encourage you to develop a TND? | → | Zoning |
| To what extent does incentives for below market rate units encourage you to develop a TND? | → | Zoning |
| To what extent does meeting other specified goals for land development (e.g., aesthetics, open space, parks, or buffers) encourage you to develop a TND? | → | Zoning |
| To what extent does objection to form-based codes (<i>a zoning code designed to regulate development to achieve a specific urban form oriented towards pedestrian-friendly design</i>) encourage you to develop a TND? | → | Zoning |
| To what extent do regulations allowing grid-streets encourage you to develop a TND? | → | Zoning |
| To what extent does fast track permitting processes for more sustainable development encourage you to develop a TND? | → | Comprehensive Plan |
| To what extent does the requirement to conform with LEED-ND standards encourage you to develop a TND? | → | Comprehensive Plan |
| Fiscal Incentives | | |
| To what extent does the government and their lenders absorb most of the risk should a real estate venture fail encourage you to develop a TND? | → | Finance |
| To what extent does the availability of tax incentives encourage you to develop a TND? | → | Finance |
| To what extent does reduced parking requirements encourage you to develop a TND? | → | Finance |
| To what extent does the ability to build some units without on-site parking encourage you to develop a TND? | → | Finance |
| To what extent does car sharing programs available in area of development encourage you to develop a TND? | → | Finance |
| Potential for Increased Marketability | | |
| To what extent does a significant amount of new real estate investment underway in area or near site encourage you to develop a TND? | → | Comprehensive Plan |
| To what extent does the availability of location-efficient mortgages (increases the amount of money homebuyers in urban areas are able to borrow by taking into account the money they save by living in "walkable" area) encourage you to develop a TND? | → | Finance |
| To what extent does potential rent premiums for superior location/access encourage you to develop a TND? | → | Finance |
| Environmental Benefits | | |
| To what extent does an adjacent transit station encourage you to develop a TND? | → | Comprehensive Plan |
| To what extent does the ability to market benefits related to walking or biking encourage you to develop a TND? | → | Finance |
| To what extent does the ability to market benefits related to health encourage you to develop a TND? | → | Finance |
| To what extent does the ability to market benefits related to reduced car use encourage you to develop a TND? | → | Finance |
| Potential Cost Savings | | |
| To what extent does reduced clearing and grading costs encourage you to develop a TND? | → | Finance |
| To what extent do potentially reduced infrastructure costs (streets, curbs, gutters, sidewalks) encourage you to develop a TND? | → | Finance |
| To what extent does reduced storm water management costs encourage you to develop a TND? | → | Finance |
| To what extent do reduced impact fees and increased lot yields encourage you to develop a TND? | → | Finance |
| To what extent does increased marketability of properties encourage you to develop a TND? | → | Finance |
| To what extent does preserved existing vegetation encourage you to develop a TND? | → | Finance |
| Prevent or Discourage | | |
| Restrictive Development Regulations | | |
| Zoning/Land Use Policies | | |
| To what extent do affordable housing requirements prevent or discourage you from developing a TND? | → | Zoning |
| To what extent do automobile oriented land-use policies prevent or discourage you from developing a TND? | → | Zoning |
| Subdivision Policies | | |
| To what extent do regulations requiring cul-de-sacs, large lots, large setbacks, wide streets, and separation of uses prevent or discourage you from developing a TND? | | Zoning |
| Lack of Support or Interest | | |
| To what extent does NIMBY (not in my backyard) prevent or discourage you from developing a TND? | → | Comprehensive Plan |
| To what extent does resistance to density prevent or discourage you from developing a TND? | → | Comprehensive Plan |
| To what extent does lack of political support prevent or discourage you from developing a TND? | → | Comprehensive Plan |
| To what extent does the inability to overcome governmental/political hurdles prevent or discourage you from developing a TND? | → | Comprehensive Plan |
| To what extent does the inability of government agencies to work together prevent or discourage you from developing a TND? | → | Comprehensive Plan |
| To what extent does the lack of market demand prevent or discourage you from developing a TND? | → | Finance |
| To what extent does the lack of lender familiarity with TNDs prevent or discourage you from developing a TND? | → | Finance |
| To what extent do lender policies do not recognize or value mixed-use prevent or discourage you from developing a TND? | → | Finance |
| Potential Costs | | |
| To what extent do gas/fuel prices for construction activities prevent or discourage you from developing a TND? | → | Finance |
| To what extent does the cost of sidewalks and intersection treatments prevent or discourage you from developing a TND? | → | Finance |
| To what extent does financing for integrated, mixed-use development (commercial and residential) prevent or discourage you from developing a TND? | → | Finance |
| To what extent do inadequate transit services prevent or discourage you from developing a TND? | → | Finance |
| To what extent do minimum parking requirements prevent or discourage you from developing a TND? | → | Zoning |
| Lack of Experience in TND | | |
| To what extent does the lack of experience with TND within my company prevent or discourage you from developing a TND? | → | Comprehensive plan |
| To what extent does the lack of experience with TND in local development community prevent or discourage you from developing a TND? | → | Comprehensive plan |
| Encourage or Discourage | | |
| To what extent does the public sector participation in development plan either discourage OR encourage you from developing a TND? | → | Comprehensive plan |
| To what extent does the zoning that allows or even encourages mixed-use development either discourage OR encourage you from developing a TND? | → | Comprehensive plan |
| To what extent do Brownfield issues (<i>abandoned or underused properties where redevelopment is complicated by actual or perceived environmental contamination</i>) either discourage OR encourage you from developing a TND? | → | Comprehensive plan |

Appendix Q: Further Permissions to Alter SHIFT Survey

Walden University Mail - Permission to use survey tool and update on study <https://mail.google.com/mail/u/0/?ui=2&ik=8b7d008d52&view=pt&sea...>



Michele Williams <michele.williams5@waldenu.edu>

Permission to use survey tool and update on study

Dix, Linda <ldix@wustl.edu>
To: Michele Williams <michele.williams5@waldenu.edu>

Mon, May 9, 2016 at 11:00 AM

Permission is granted to use materials.

Thank you and Best of luck!

Linda

From: Michele Williams [mailto:michele.williams5@waldenu.edu]
Sent: Friday, May 06, 2016 1:18 PM
To: Dix, Linda <ldix@wustl.edu>; prcstl@wustl.edu
Subject: Fwd: FW: Permission to use survey tool and update on study

Hi Linda,

I have had to adjust my research question somewhat, thereby altering my independent variables (comprehensive plans, zoning policies, and finance policies). I am still able to use the questions from the survey; however, I needed to map the SHIFT questions to my variables. I also had to restructure the sentence construction into more of a Likert scale presentation. I have attached my mapping and my restructuring of the questions for your approval to still use the SHIFT instrument for my dissertation. The 3rd tab in the spreadsheet is the edited/adjusted survey tool that I will upload into SurveyMonkey.com to collect my data.

Thank you in advance.

m

On Tue, Sep 22, 2015 at 11:12 AM, Dix, Linda <ldix@wustl.edu> wrote:

From: Valko, Cheryl
Sent: Tuesday, September 22, 2015 10:10 AM
To: Dix, Linda
Subject: FW: Permission to use survey tool and update on study

Appendix R: Supporting Tables from SPSS

Table R1

Test for Linearity

| Independent Variables | Score Statistics | Significance |
|--|------------------|--------------|
| Comprehensive Plan *ln(Comprehensive Plan) | -10.3920 | .00000 |
| Zoning Policies *ln(Zoning Policies) | -11.8640 | .00000 |
| Finance Policies *ln(Finance Policies) | -11.1210 | .00000 |

Table R2

Coefficients

| Model | | t | Significance | Collinearity Statistics | |
|-------|---------------------|--------|--------------|-------------------------|-------|
| | | | | Tolerance | VIF |
| 1 | Comprehensive Plans | -2.522 | .013 | .014 | 73.9 |
| | Zoning Policies | 8.965 | .000 | .013 | 117.3 |
| | Financing Policies | 2.055 | .043 | .043 | 100.3 |

a. Dependent Variable: Y/N RE Developers will Build Healthy Communities

Table R3

Casewise Diagnostics

| Case Number | Standardized Residual | comparison group | Unstandardized Predicted Value | Unstandardized Residual |
|-------------|-----------------------|------------------|--------------------------------|-------------------------|
| 22 | -3.076 | .00 | .6550 | -.65496 |
| 23 | -2.948 | .00 | .6276 | -.62762 |

a. Dependent Variable: Y/N RE Developers will Build Healthy Communities

Table R4

Classification Table

| Observed | | Predicted | | | |
|--------------------|---------------------------------------|---------------------------------------|-----|--------------------|-------|
| | | Decision to Build Healthy Communities | | Percentage Correct | |
| | | No | Yes | | |
| Step 0 | Decision to Build Healthy Communities | No | 0 | 21 | .0 |
| | | Yes | 0 | 76 | 100.0 |
| Overall Percentage | | | | | 78.4 |

a. Constant is included in the model.

b. The cut value is .500

Table R5

Variables in the Equation

| | B | S.E. | Wald | df | Sig. | Exp(B) | |
|-----------------------|----------|-------|------|--------|------|--------|-------|
| Step 0 ^{a,b} | Constant | 1.286 | .247 | 27.220 | 1 | .000 | 3.619 |

a. Variable(s) entered on step 1: Comprehensive_Plans, Zoning_Policies, Financing_Policies.

b. Variable(s) entered on step 1: Comprehensive_Plans, Zoning_Policies.

Table R6

Bootstrap for Variables in the Equation

| | | Bootstrap ^a | | | | | |
|--------|----------|------------------------|------|------------|-----------------|-------------------------|-------|
| | | B | Bias | Std. Error | Sig. (2-tailed) | 99% Confidence Interval | |
| Lower | Upper | | | | | | |
| Step 0 | Constant | 1.286 | .023 | .253 | .001 | .662 | 2.056 |

a. Unless otherwise noted, bootstrap results are based on 1000 bootstrap samples

Table R7

Omnibus Tests of Model Coefficients

| | | Chi-square | df | Sig. |
|--------|-------|------------|----|------|
| Step 1 | Step | 72.748 | 3 | .000 |
| | Block | 72.748 | 3 | .000 |
| | Model | 72.748 | 3 | .000 |

Table R8

Hosmer and Lemeshow Test

| Step | Chi-square | df | Sig. |
|------|------------|----|-------|
| 1 | .000 | 2 | 1.000 |

Table R9

Model Summary

| Step | -2 Log likelihood | Cox & Snell R Square | Nagelkerke R Square |
|------|---------------------|----------------------|---------------------|
| 1 | 28.604 ^a | .528 | .814 |

a. Estimation terminated at iteration number 20 because maximum iterations has been reached. Final solution cannot be found.

Table R9

Classification Table

| Observed | | Predicted | | Percentage Correct |
|--------------------|---------------------------------------|---------------------------------------|------|--------------------|
| | | Decision to Build Healthy Communities | | |
| | | No | 2.00 | |
| Step 1 | Decision to Build Healthy Communities | No | 0 | 100.0 |
| | | 2.00 | 70 | 92.1 |
| Overall Percentage | | | | 93.8 |

a. The cut value is .500

Table R10

ANOVA Table

| | | Sum of Squares | df | Mean Square | F | Sig. |
|---|---------------------------|----------------|----|-------------|--------|------|
| Decision to Build Healthy Communities * Comprehensive Plans | Between Groups (Combined) | 8.817 | 5 | 1.763 | 21.014 | .000 |
| | Within Groups | 7.636 | 91 | .084 | | |
| | Total | 16.454 | 96 | | | |
| Decision to Build Healthy Communities * Zoning Policies | Between Groups (Combined) | 7.704 | 5 | 1.541 | 16.024 | .000 |
| | Within Groups | 8.750 | 91 | .096 | | |
| | Total | 16.454 | 96 | | | |
| Decision to Build Healthy Communities * Financing Policies | Between Groups (Combined) | 11.787 | 6 | 1.964 | 37.887 | .000 |
| | Within Groups | 4.667 | 90 | .052 | | |
| | Total | 16.454 | 96 | | | |

Table R11

Measures of Association

| | R | R ² | Eta | Eta ² |
|---|------|----------------|------|------------------|
| Decision to Build Healthy Communities * Comprehensive Plans | .528 | .279 | .732 | .536 |
| Decision to Build Healthy Communities * Zoning Policies | .504 | .254 | .684 | .468 |
| Decision to Build Healthy Communities * Financing Policies | .593 | .351 | .846 | .716 |

Table R12

Paired Sample Differences

| | | Mean | Std. Deviation | Std. Error Mean | t | df | Sig. (2-tailed) |
|--------|---|---------|----------------|-----------------|--------|----|-----------------|
| Pair 1 | Decision to Build Healthy Communities & Comprehensive Plans | -.21649 | .85667 | .08698 | -2.489 | 96 | .015 |
| | | | | | | | |
| Pair 2 | Decision to Build Healthy Communities & Zoning Policies | -.18557 | .88188 | .08954 | -2.072 | 96 | .041 |
| | | | | | | | |
| Pair 3 | Decision to Build Healthy Communities & Financing Policies | -.29485 | .78956 | .08017 | -3.678 | 96 | .000 |
| | | | | | | | |

Appendix S: Supporting Figure From SPSS

