



**Contents**

About the Sponsors ..... 3

About the Competition ..... 3

Notice to Competitors ..... 4

The Competition Host City: North Charleston, South Carolina ..... 4

The Competition Site and Study Area ..... 7

Reading and Listening Resources ..... 8

Local and Regional Data ..... 9

Development Context ..... 9

    Urban Planning ..... 9

    Historic Resources ..... 9

    Housing and the Unhoused ..... 10

    Transportation ..... 10

    Adjacent Neighborhoods/Places ..... 11

    Area Developments ..... 13

The Competition Challenge ..... 14

Detailed Assignment ..... 15

    Goals and Deliverables ..... 15

    Essential Presentation Elements ..... 15

    Detailed Guidance on the Essential Presentation Elements ..... 15

    Assumptions ..... 17

Competition Resources ..... 19

Criteria for Judging ..... 19

Jury Evaluation Process ..... 20

Presentation Requirements ..... 21

    Required Presentation Materials ..... 21

    Notes on Graphics ..... 22

Submission Process ..... 22

Finalist Requirements ..... 23

Tools ..... 23

Questions ..... 24

Appendix: Site Images ..... 25

Please refer to the competition website, [uli.org/hines](http://uli.org/hines) for relevant updates.

## About the Sponsors

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Learn more about Hines at [www.hines.com/about](http://www.hines.com/about). Follow Hines on [Twitter](#), [Facebook](#), [LinkedIn](#), [Instagram](#), and [YouTube](#).

Students and graduates, consider becoming [a member of ULI!](#) ULI members have access to:

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- [ULI Case Studies](#)
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- Under 35 or Government, Nonprofit, and Academia 50 percent discount off regular rate
- Students 75 percent discount off regular rate

## About the Competition

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The ULI Hines Student Competition, now in its 22nd year, is one of the core education initiatives of the Urban Land Institute. The competition offers eligible students the opportunity to form multidisciplinary teams and engage in a challenging exercise in responsible land use. It is part of ULI's ongoing effort to raise interest among young people in creating better communities, improving development patterns, and increasing awareness of the need for multidisciplinary solutions to development and design challenges.

The late Gerald D. Hines, founder and chairman of the Hines real estate company, was the 2002 recipient of the \$100,000 [ULI Prize for Visionaries in Urban Development](#). A firm believer in the power of people and fostering transformative values, Hines declined the prize money and endowed the competition with an additional \$3 million, ensuring its longevity and legacy for future generations of practitioners.

“The purpose of the competition is to raise awareness, particularly among the next generation, of the important role that high-quality urban design plays in creating not just beautiful buildings, but living environments,” Hines said.

The competition encourages cooperation and teamwork among future real estate developers and investors and the many allied professions, such as architecture, landscape architecture, planning, finance, historic preservation, law, and public policy, among others. Since the competition began in 2003, more than 10,700 students on over 2,143 teams have participated, including 80 teams (400 students) who have made it to the finalist round. More than 1,000 real estate and design professionals have served as advisers to these teams.

# Notice to Competitors

UNDER NO CIRCUMSTANCES SHOULD YOU COMMUNICATE REGARDING THE COMPETITION WITH HINES; THE CITY OF NORTH CHARLESTON OR OTHER REGIONAL MUNICIPALITIES; BERKELEY, CHARLESTON, OR DORCHESTER COUNTIES; THE STATE OF SOUTH CAROLINA; THE NONPROFIT AND PUBLIC AGENCIES INVOLVED; THE PROPERTY OWNERS OR EMPLOYEES OF THE PROPERTY OWNERS; CONSULTANTS WHO ARE WORKING OR WHO HAVE WORKED ON THE PROJECT; THE COMPETITION JURY; AREA RESIDENTS; OR OTHER ASSOCIATED ENTITIES UNLESS THEY ALREADY ARE AMONG YOUR PROFESSIONAL ADVISERS. DO NOT CALL ULI'S HEADQUARTERS IN WASHINGTON, D.C., ULI SOUTH CAROLINA, OR OTHER ULI DISTRICT COUNCILS UNLESS THOSE DISTRICT COUNCILS ALREADY HAVE OFFERED TO BE A RESOURCE TO YOUR TEAM. IF ULI LEARNS THAT YOU HAVE TRIED TO COMMUNICATE IN THE MANNER DESCRIBED HERE, ULI MAY DISCARD YOUR SUBMISSION AND THE JURY WILL NOT REVIEW IT.

## The Competition Host City: North Charleston, South Carolina

This year's competition is focused on a site in North Charleston, South Carolina. North Charleston is the third-largest city in South Carolina, with a population of 117,472 (2020 census). North Charleston lies directly north of Charleston, a seaport and major tourist destination with beaches, waterways, and early American historical sites. North Charleston is part of the Charleston metropolitan area, also known as the Tri-County area, and the city's 77 square miles span three county jurisdictions—Berkeley, Charleston, and Dorchester. North Charleston is flanked by two saltwater rivers, the Ashley River and Cooper River, which were key for agricultural trade throughout the colonial era and were instrumental in the city becoming one of the East Coast's largest sites for U.S. Navy operations from 1902 until its naval base closed in 1996.

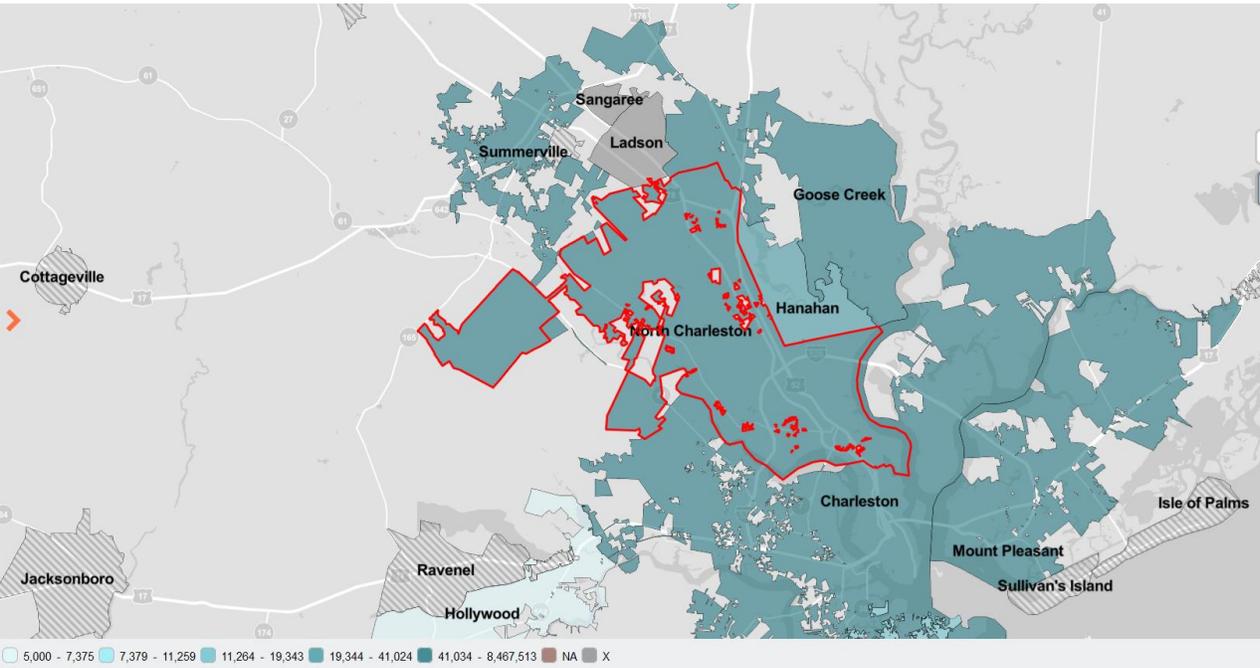


Figure 1. North Charleston, South Carolina. U.S. Census Bureau. Population Estimates, July 1, 2021, (V2021). [Accessed 11/3/2022 at [Census.gov](https://www.census.gov)].

## History

Though Native American communities occupied the tidal lands in the region for thousands of years before the first Spanish explorers arrived in this region, little of their mark remains on the current geography: they were forced out or died of European diseases beginning in the 1500s. Throughout the 1700s and 1800s, colonial landowners and their descendants cultivated large tracts of land as plantations alongside the Cooper and Ashley rivers for indigo and rice and were dependent on slave labor for their export profits.



Figure 2. Aerial view of the Charleston Navy Yard in 1941. Wikiwand.com. [Accessed 11/3/2022]

### The Local Economy and U.S. Military

After the Civil War and Reconstruction, the Theodore Roosevelt administration began allocating major resources to the U.S. Navy to contend with European powers, and the Charleston navy base and shipyard were built in 1902 on 1,575 acres. Over the following decades, the people depending on those jobs in shipping production made up the communities that eventually became the city of North Charleston in 1972.

More recently, various industries have established themselves in North Charleston, including manufacturing, as outlined in the city's [Comprehensive Annual Financial Report](#) (CAFR). The region produces a wide variety of products including airplane and automobile components, electronics, housewares, machinery, paper, tools, and more. Other major employers are in aerospace, defense, distribution, education, financial, food, health care, and retail sales services. North Charleston has long led all other municipalities in South Carolina in retail; gross retail sales exceeded \$7.9 billion as of June 2021. Access to Interstates 26 and 526 and the presence of rail lines, including [Amtrak](#), CSX, and [Norfolk Southern](#) enables much of this economic activity.

Though the navy shipyard closed in 1993, the military still has presence at the nearby [Joint Base Charleston](#), which includes U.S. Air Force and Navy components, the Naval Weapons Station, and the [Charleston International Airport](#), a joint civil/military facility. The second-largest U.S. Coast Guard base in the nation is

being developed, with \$500 million to \$800 million of investment, on the southern end of the former navy base, just north of the [Hugh Leatherman Port Terminal](#), which opened in March 2021.

### **Recent Growth**

Today, North Charleston is experiencing the region’s fast-paced growth, development sprawl, and, in some cases, denser, mixed-use development. There is increased demand for housing, and the number of housing units available has not kept pace with migration into the Charleston metro area. The area’s popularity has resulted in regional growth equating to 40 net new residents per day, according to an [analysis](#) from the [Charleston Regional Development Alliance](#). Of the 47,000 new housing units added between 2010 and 2019, 40,000 (86 percent) were in single-unit structures, according to a [housing affordability policy study](#) prepared for the Charleston metro area. The ULI/PwC publication [Emerging Trends in Real Estate® 2023](#) includes Charleston among the top 50 regions in its “U.S. Markets to Watch: Homebuilding Prospects” list. North Charleston has 43,372 households and a median household income of \$47,201. North Charleston’s employment opportunities and migration patterns have created a diverse, culturally rich population. Of the city’s residents, 11 percent identify as Hispanic or Latino, 2.3 percent identify as Asian, 44 percent identify as Black, 44 percent identify as White, and 4.6 percent identify as Two or More Races ([2020 census](#)).

*(These trends and more are explored in the “Reading and Listening Resources” list, below.)*

## The Competition Site and Study Area



Figure 3. A view of the competition site, looking northwest from where the Noisetto Creek meets the Cooper River. (ULI/Karl Brenkert)

The city of **North Charleston, South Carolina**, has identified a **Site**—located at the north end of Census Tract 55 in southeastern North Charleston—as a development opportunity.

The Site is part of a larger **Study Area**, which lies along the Cooper River and east of the Park Circle neighborhood, in the northern part of the former navy base. The **Study Area** consists of 87.4 acres, including public rights-of-way. Its boundaries are Noisetto Creek to the south and the Cooper River to the east and include Parcel 4000000425 to the north and Parcel 4000000217 to the west (just west of Noisetto Boulevard). Parcel data is available at [Charleston County GIS](#).

The competition **Site** consists of all *city-owned* parcels within the **Study Area**, including public rights-of-way. The city owns approximately 49 acres across eight parcels inside the Study Area.

Inside the Study Area there are two privately held parcels and a 21.3-acre parcel owned by the U.S. government and used by the U.S. Department of Defense (DoD).

More details about the specific challenge begin on page 14, which will be available January 9.



Figure 4. The Study Area and Site. The Site consists of all city-owned parcels, in green. The Study Area includes all parcels in green, red, and blue. Three parcels inside the Study Area are not part of the Site: the DoD parcel, in red, and the two privately owned parcels, in blue.

# Reading and Listening Resources

The links below provide access to resources on North Charleston. Some of these resources will be available in the [Google Drive folder](#), titled [2023 ULI Hines Student Resources](#). You should conduct additional research to learn about the region, city, and study area, and follow additional links provided on the following pages.

## Public Resources

[Attainable Housing Resource Guide](#), February 12, 2021, Charleston Metro Chamber of Commerce.

[Emerging Industrial Market: Charleston, South Carolina](#), October 19, 2022, CBRE Insights & Research.

[Housing Affordability Policy in the Charleston Metro Area](#), January 7, 2022, Anderson Economic Group LLC.

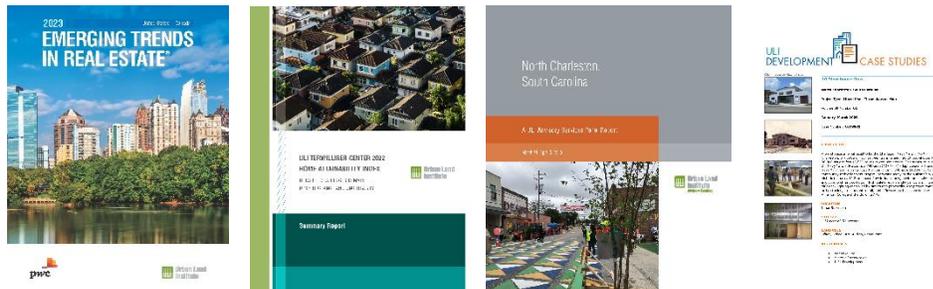
[Lowcountry Rapid Transit Affordable Housing Assessment & Strategies](#), April 5, 2021, BCDCOG.

[Lowcountry Alliance for Model Communities \(LAMC\) Area Revitalization Plan](#), April 16, 2010, AECOM.

[The Southern Fork](#) podcast—episodes in North Charleston near the Site:

- [Episode 21](#): Jaime Tenny: Coast Brewing, June 24, 2022
- [Episode 236](#): Shuai & Corrie Wang, Jackrabbit Filly, July 23, 2021
- [Episode 220](#): Germaine Jenkins, Fresh Future Farm, April 2, 2021

## ULI Reading



The following resources are available to students for the competition. Some resources are typically available only to [ULI members](#).

[Emerging Trends in Real Estate® United States and Canada 2023](#), October 27, 2022, PwC and the Urban Land Institute.

[ULI 2022 Terwilliger Center Home Attainability Index](#), July 25, 2022, the Urban Land Institute.

## ULI Advisory Services Panels, Case Studies, and Award Winners

Advisory Services panel: [North Charleston, South Carolina](#), March 31–April 5, 2019. Sponsor: City of North Charleston, Charleston County, and the South Carolina Coastal Conservation League. Subject area: Adaptive Reuse and Economic Development. The report is available in the [Google Drive folder](#).

Case study: [10 Storehouse Row](#)—January 1, 2009

Developments in the region that have won [ULI Global Awards for Excellence](#) since 2000:

- 2007: [Daniel Island](#); Charleston, South Carolina; The Daniel Island Company. Two reports available in the Google Drive folder.
- 2001: [Dewees Island](#); Dewees Island, South Carolina; Island Preservation Partnership. 1995 report available in the Google Drive folder.
- 2000: [Spring Island](#); Beaufort County, South Carolina; Chaffin/Light Associates.

## Local and Regional Data

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The [U.S. Census Bureau](#), including [Quick Facts](#), provides important demographic data, as does the [Berkeley-Charleston-Dorchester Council of Governments](#) (BCDCOG).

Further data is available on the region, the city, and downtown from a variety of sources. Learn more about the city and downtown at [Discover South Carolina](#), where local heritage sites like the [Gullah Geechee Corridor](#) are listed, along with [nearby restaurants](#). Information on the nearby Charleston destinations is available from the Charleston Visitors Bureau at [Explore Charleston](#).

The area has several entities dedicated to supporting commerce in the metro region and locally, including the [Charleston Metro Chamber of Commerce](#), the [North Charleston Chamber](#), the [South Carolina Chamber](#), the [Charleston Regional Development Alliance](#), and [Charleston County \(Charleston County Economic Development\)](#). Freight transportation is an important economic driver for the Charleston region, and [Palmetto Railways](#) is working with the [South Carolina Ports Authority](#) to build a new intermodal transportation facility (ITF) in the former Naval Complex; see more information on the Naval Base Intermodal Facility (NBIF) below, under “Transportation.”

Venues and resources for culture and the arts include the [North Charleston Performing Arts Center](#), [North Charleston Coliseum](#), [Firefly Distillery music series](#), an ongoing [Farmers Market](#), various concerts and festivals hosted at [Riverfront Park](#) such as [Charleston Food + Wine](#) and [High Water](#), and local [visual artist exhibitions](#).

## Development Context

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### Urban Planning

The comprehensive plans for [Charleston County](#) and [North Charleston](#) detail initiatives for “complete streets,” an improved quality of life, and neighborhood visioning, among other objectives. These initiatives address challenges and planning recommendations inside county and city lines, as well as in relation to the neighboring Dorchester and Berkeley counties. Regional planning studies also are available from [BCDCOG](#).

The 2003 [Noisette Community Master Plan](#), though never implemented, laid the groundwork and provided inspiration for future redevelopment of about 3,000 acres spanning the north end of the naval base. The master plan offered a forward-thinking approach to density and sustainability and included a vision for the competition Study Area, which it called River Center North.

Smaller-scale plans close to the Study Area include the [Master Plan for the Neck Area](#) and the [Lowcountry Alliance for Model Communities \(LAMC\) Area Revitalization Plan](#). The city of Charleston’s StoryMap, [“Urban Displacement in Charleston, SC,”](#) lends insight to the historical context of race and equity in the urban space. Other resources and groups addressing environment and equity in the area include [Metanoia](#), the [Coastal Community Foundation](#), the [South Carolina Community Loan Fund](#), and the [South Carolina Coastal Conservation League](#). Various efforts at the neighborhood scale are working to foster equitable development and [bring fresher food to the area](#), as well as [new construction in Park Circle](#).

### Historic Resources

Several historic districts and historic zoning overlays are located in North Charleston, though none overlaps with the competition Study Area. Details on the historic districts are in the city’s Comprehensive Plan, [Appendix A – Existing Conditions – Cultural and Historic Resources](#), section 6.3—[Charleston Navy Yard Historic District](#), [Charleston Navy Hospital Historic District](#), [Charleston Navy Yard Officers’ Quarters Historic District](#), and part of the [Ashley River Historic District](#). Historic zoning overlay districts (Olde North Charleston Neighborhood Historic District, Olde North Charleston Neighborhood Conservation District, and the Ashley River Scenic District) are in section 6.4 of the Comprehensive Plan, Appendix A.

## Housing and the Unhoused

The housing portion of the North Charleston [Comprehensive Plan](#) includes statistics on the change in the number of units over the past 20 years, percentage of renters and owners, average age of the housing stock, housing affordability, and more. Single-family detached homes make up 49 percent of the current housing stock, and just over one-third of the city's housing supply is multifamily.

According to the [Low Country Rapid Transit Affordable Housing Assessment & Strategies report](#) conducted by the BCDCOG, there is a 10,000-unit shortfall of rental units across the Tri-County region for households earning less than \$35,000. Median rent increased 28 percent from 2013 to 2017 ([North Charleston Comprehensive Plan, Appendix A](#), section 3.2.3); 58.5 percent of rental-occupied households in North Charleston spend more than 30 percent of their income on housing. According to the 2022 [ULI Home Attainability Index data on Policy Map](#), in the Charleston/North Charleston metropolitan statistical area, 11.43 percent of households with annual incomes of \$35,000 to \$50,000 are severely cost burdened and 2.91 percent of households with a yearly income of \$50,000 to \$74,999 are severely cost burdened.

In 2020, 323 homeless people were counted in Charleston County, and officials and advocates say that number has increased in the intervening years. To address the issue, the city of North Charleston in 2022 created the position of [homeless coordinator](#) to connect the local homeless population to services and health care. However, there are currently no homeless shelters in North Charleston ([Post and Courier](#)).

## Transportation

The [Mobility and Connectivity section](#) of the Comprehensive Plan details the city of North Charleston's priorities and projects for transportation over the next 20 years, including \$3 billion of committed funding for various improvements. BCDCOG, staffing the region's Metropolitan Planning Organization (MPO), has also developed the Charleston Area Transportation Study (CHATS) [long-range transportation plan](#) covering automobile, transit, bicycle, pedestrian, railroad, freight, and intermodal movements for the Tri-County area.

The [CARTA](#) bus system provides access across urbanized portions of the Charleston/North Charleston region, with bus line 104 running along the western edge of the Study Area. [Lowcountry Rapid Transit](#) (LCRT) is a planned bus rapid transit (BRT) system that will serve the greater Tri-County region, with construction anticipated to begin in 2026. The system will include dedicated bus lanes and 10-minute frequency across 20 stations. As part of the planning process for the LCRT, BCDCOG produced a [transit-oriented development plan](#), one component of which is an [affordable housing study](#).

North Charleston has a few bike lanes, one of which passes a few blocks to the west of the competition site, along Spruill Avenue. [Walk Bike BCD](#) has proposed [plans](#) to improve walking and biking access and safety in the three-county region.

I-26 passes through North Charleston, connecting it to North Carolina and parts of eastern Tennessee. It is also a hurricane evacuation route with lanes that can be reversed to allow counterflow traffic when necessary. I-526 is a partial beltway around Charleston that serves as a bypass around its downtown for U.S. Route 17.

[Charleston International Airport](#) is in North Charleston and served 4.9 million passengers in 2019.

Plans for the [Naval Base Intermodal Facility](#) include construction of the Northern Rail Connection, a track that will link the facility across Noiset Creek and run along the western portion of the Study Area. Palmetto Railways will provide long-term maintenance and landscaping of this area.



Figure 5. Draft plans for the Naval Base Intermodal Facility. CDM Smith, TranSystems. Accessed 3/21/2019. The high-resolution map is in the Google Drive folder.

### Adjacent Neighborhoods/Places

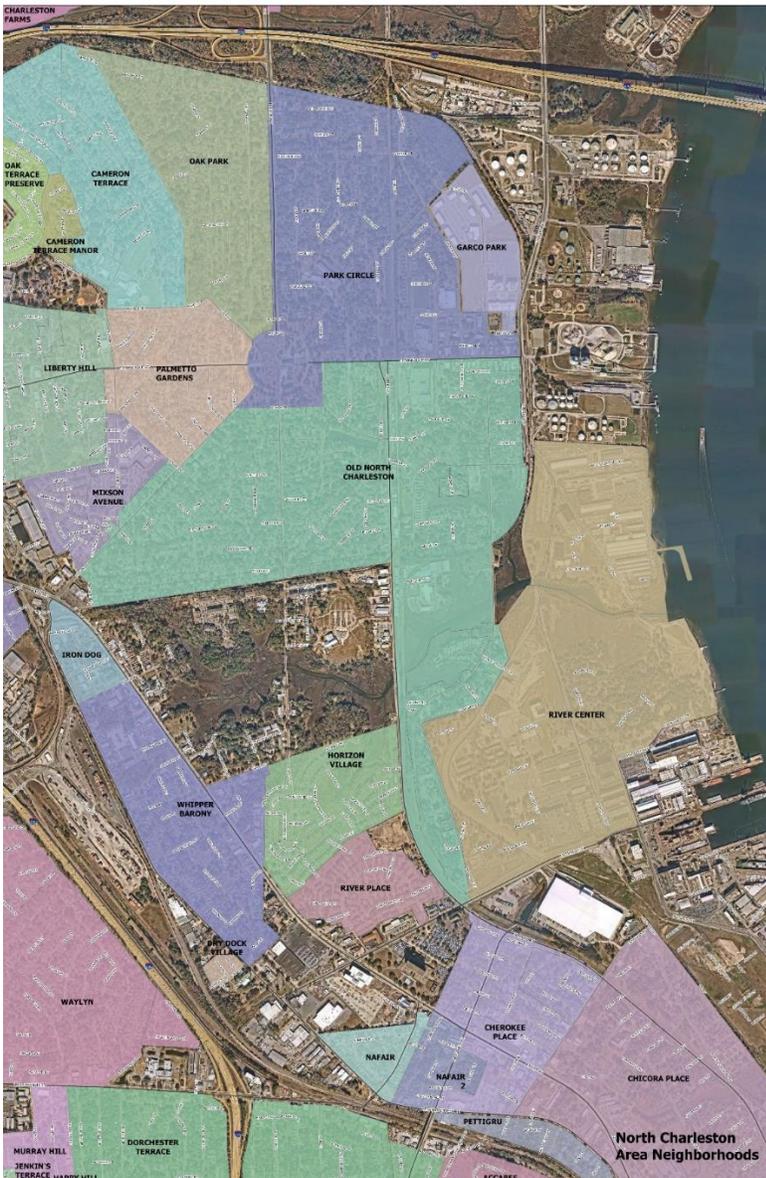


Figure 5. North Charleston Area Neighborhoods. City of North Charleston Planning Division. The high-resolution map is in the Google Drive folder.

[Odfjell Terminals Charleston](#) is adjacent to the Study Area to the north and serves the bulk liquid and specialty chemical, vegetable oil, and petroleum industries. The site includes nine tanks with a capacity of almost 80,000 cubic meters, with accessibility for marine vessels, rail cars, ISO tanks, and tank trucks, as well as one deep-sea berth for barges and tankers.

[Park Circle](#), to the west and northwest of the Study Area, is the historic economic center of North Charleston. Designed during the Garden City movement of the early 20th century, it was one of the first master-planned developments in the South. The developers planned out 1,500 acres with the intention to create a self-sufficient community that would incorporate residential, agricultural, and industrial uses. A recent renaissance along East Montague Avenue in Park Circle has attracted strong investment in new housing, park amenities, and a thriving historic business district.

Noisette Creek forms the southern border of the Study Area. In 2022, the city completed an 800-foot [pedestrian bridge](#) across the creek, connecting the Study Area to the city-owned [Riverfront Park](#), site of the Charleston Naval Base Memorial, the Admiral’s Garden, and the Amphitheater at the Point, among other amenities. Along the edges of the park, the city owns historic quarters leased by the [Charleston Naval Complex Redevelopment Authority \(RDA\)](#). Details of recent [renovations of some of the historic quarters](#) are available on the RDA website. For example, Quarters H & I are rented out for special events and weddings; another houses the restaurant [MOMO](#), which offers outdoor seating along Riverfront Park; and plans are underway to redevelop one of the quarters for a future [naval museum](#).

Several neighborhoods south of the Study Area that can benefit from additional connectivity and mobility in the area are African American communities, including Chicora-Cherokee, Union Heights, and Accabee, among others. Neighborhood leaders in these communities are working in partnership with the [Coastal Community Foundation](#) and [Metanoia](#) to prevent displacement of aging residents and those being priced out by rising rents and housing costs. Metanoia [got its start](#) when an initiative by the [Cooperative Baptist Fellowship of South Carolina](#) (CBFSC) to address childhood poverty in the state decided to focus its work in the Chicora-Cherokee community. Neighborhood leaders LAMC also worked with state and city representatives on a [Community Mitigation Plan](#), of which future plans for the remaining spending are under negotiation.

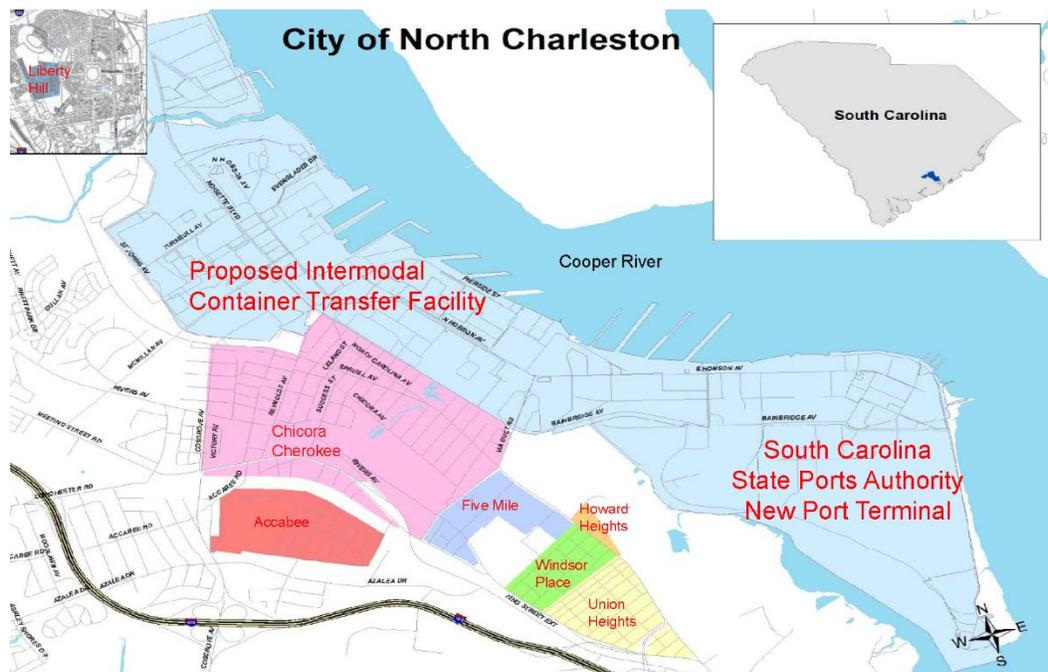


Figure 6. [Lowcountry Alliance for Model Communities \(LAMC\) Area Revitalization Plan](#)

## Area Developments

The city outlines local capital improvement and new facilities projects [on its website](#). The *Charleston City Paper* offers the [Charleston Crane Count](#) of projects in Charleston. Notable developments near the site include the following.

- Jamestown, Jay Weaver, and William Cogswell are repositioning a portion of the former naval base as a 75-acre, 1.2 million-square-foot mixed-use development under the banner [Navy Yard Charleston](#). Much of the redevelopment area is in the Charleston Navy Yard Historic District west of Riverfront Park and east of the rail line and includes 12 existing buildings, some of which will be reused and preserved. Significant redevelopments upcoming include:
  - Renovation of the historic [Power House](#) to serve as an entertainment venue. This will be the southernmost piece of Navy Yard redevelopment activity.
  - Renovation of the historic [Charleston Navy Hospital](#), an 11-story building farther west at 3600 Rivers Avenue, to provide 293 multifamily and live/work units.
  - Adaptive use of storehouses 8 and 9 as retail, office, and multifamily.
  - Redevelopment of the naval hospital complex—the infirmary—as multifamily units.
- The [Navy Yard Industrial Campus](#) offers space for maritime, manufacturing, and logistics on the decommissioned base.
  - In 2020, tenant [Urban Electric Co. doubled its footprint](#), adding space for its [manufacturing facility](#) at 2120 Noisette Boulevard. Urban Electric is also a tenant of Navy Yard Charleston.
- [Montague Corners](#)—New York City–based CP Capital and Charleston-based Greystar will develop a three-story, 336-unit multifamily property just off I-526.
- [The Assembly](#)—The Beach Company and ParkProperty Capital [broke ground](#) on this 211-unit multifamily development in Park Circle, scheduled to be completed in 2024.