

UrbanPlan Exercise Instructions

Your instinct will be to read the handbook quickly and ignore the associated exercises. Instead, before you look at the handbook, read exercises 3, 4 & 5. This will provide some context for the “due diligence” you’re about to undertake. The exercises are critical to understanding the program and process. It will also insure that you get the most out of the time you spend preparing.

Exercise #3 - Reading and Written Exercise

- **READING:** In the UrbanPlan Handbook carefully read About UrbanPlan, RFP, Site Plan, Design Guidelines & Neighborhood Letters
- **WRITTEN: Exercise # 3:** Guided Reading Exercise

Exercise #4 - Reading & Written Exercise

READING:

- UrbanPlan Handbook: Examine the information in each tab so you will understand the nature and location of the resources available as you work on your proposal.
- Carefully read the “Presentation” including the “Jury Review Checklist.”
- Re-read “Creating an Effective Development Team” in “About UrbanPlan”
- Read all 5 roles in the “Development Team” section (these are only 1 page each)
- **WRITTEN: Exercise #4:** Note the instructions. You only indicate the page where the answer can be found; you are not required to answer the questions.

Exercise #5: Reading & Written Exercise

- **READING**
 - Study the sections: “Existing Buildings,” “New Buildings,” and “Building Tools”
 - In class, we will build a sample of each type of building based on the information in the above sections. Many teams will misinterpret the information and build structures incorrectly or misallocate parking. This will waste valuable time, since it will result in making incorrect financial model inputs.
- **WRITTEN**
 - **Exercise #5:** Read the questions for all roles, but write the answers for your role only.

Assignment: Understanding and Using the Financial Model Spreadsheet

If you do not have correct “Add-ins” installed on your Excel program, you will not be able to experiment with the Financial Model. The “Read Me First” document emailed to you will tell you how to select them on your computer. If they are not installed, you will have to go to the original MS Office/Excel disk to install these extra features. These instructions make sure your Excel program is set up with the correct “Add-ins” to calculate your inputs. If you do not have Excel or cannot enable the correct “Add-ins” please review the Financial Analyst role page and Financial Model instructions in the Financial Analyst section of the UrbanPlan handbook. It will look rather complex if you can only read it, but you’ll find it both very simple to use, and powerful.

- Next, you will use your computer and handbook for this session (make sure you understand the information provided in each worksheet)
- Re-read the one + page “Financial Analyst” role information
- On your computer, open and read the “Read Me First” document that accompanies the excel-based Financial Model Demo.
- Open the Financial Model Demo and follow as you read the “How to Use the UPII Financial Planning Program” instructions. After you understand the basics, play around with some different numbers.
 - Use Allocation Sheet: Change the % of affordable housing from 20% to 80% and notice the impact on the Developer Return and City Return on the Summary Sheet
 - Value Sheet: See the impact on the when you over-build demand (Absorption Adjustment Column)