

Curriculum Vitae

2007

HEARD, Jr., Isaac
6728 Constitution Lane
Charlotte, NC 28210-4216
704/552-1493 (H)
704/451-2055 (M)
heardsystem@aol.com

EDUCATION

Bachelor of Arts – Sociology and Urban Studies, Dartmouth College, 1971, (National Achievement Scholar). Computer-based statistical analyses of survey, demographic and market data highlighted this broad-based liberal arts program. Emphasis was placed on understanding the interrelationships among the various elements active in the formulation of public opinion, policy and actions.

Master in City Planning, Harvard University, 1973. (U.S. Department of H.U.D. Urban Studies Fellow). This program stressed the economic and political imperatives driving the urban development process. Considerable cross-registration with the Business School, the Law School and the School of Public Administration were required to reinforce the multi-disciplinary emphases of this program.

Master of Urban Administration, University of North Carolina at Charlotte, 1978. This program placed emphasis on program evaluation, administrative behavior and management techniques. Interdisciplinary problem-solving techniques, management of groups and meetings, and quantitative analyses were my particular emphases in this program.

Harvard University, Kennedy School of Government's Executive Program for State and Local Government, 1997. (Fannie Mae Fellow)

OTHER TRAINING

1. Public/Private Partnerships in Urban Development Financing Short Course (Certificate from The Georgia Institute of Technology)
2. Neighborhood Revitalization Strategies (Certificate from the Neighborhood Reinvestment Training Institute)
3. The Rehabilitation Loan Process (Certificate from the Neighborhood Reinvestment Training Institute)
4. Advanced Housing Production Management (Certificate from the Enterprise Foundation)
5. Acquisition and Rehabilitation for Homeownership (Certificate from the Enterprise Foundation)
6. Civic Entrepreneurship Workshop (Certificate from the Kenan Institute of Charlotte, the University of North Carolina at Chapel Hill)
7. Building HOME – A HOME Program Primer (Certificate from the US Dept. of Housing and Urban Development)

PROFESSIONAL EXPERIENCE

Private Planning Consultant, 1988 – Present

I have operated as a sole proprietor market research and strategic planning consultant to a number of small businesses in the Charlotte area. These included restaurants, general contractors, banks, savings and loan institutions, optometrists, nursing registry services, fine arts galleries, and convention/visitors' bureaus. In a related capacity I served as the program evaluator for a 4 year, longitudinal federally funded study of youth gang violence and drug activity overseen by the Mecklenburg County Health Department. I have also served as a planning consultant for the Charlotte-Mecklenburg School District's Planning Division, for the SC Association of Community Development Corporations, and as a planning consultant to the City of Spartanburg's (SC) Department of Community Development.

Charlotte Office Director, Enterprise Foundation, 1999 – 2003

In this capacity I am responsible for managing a 3-person staff that provides technical assistance and funding (core operating grants and project loans) to 6 Charlotte-area community development corporations (CDC's). During my tenure I have been responsible for developing annual budgets and grant funding sources (~\$750,000/year) for operating support of the local office and our partner CDC's, as well as a strategic plan for affordable housing development among these CDC's that will be the basis for the City of Charlotte's dedication of "gap" financing for such projects. The Enterprise Foundation is a national organization that works with partners to provide low-income people with affordable housing, safer streets and access to jobs and childcare.

Executive Director, NW Corridor Community Development Corporation, 1991 – 1999

In this capacity and with the assistance of a 3-person staff, I was responsible for planning and executing a 55,000 SF shopping center; developing over 200 units of affordable housing stock (new, rehabilitated, rental and owner occupied); co-developing (with Volunteers of America) a 60-unit Low Income Housing Tax Credit project for the fixed income elderly; implementing leadership training seminars for volunteer neighborhood activists; and developing a 30,000 SF community-oriented services facility and office building (sold to the Carolinas Medical Center and operating as a free-standing medical clinic). In support of these projects, I raised more than \$2 million in grant funds to support the core operations of the CDC and more than \$24 million in loans, investments and grants to finance the various projects. These efforts have been recognized in

- 1996 by the National League of Cities Partnership Award (for the shopping center);
- 1997 & 1998 Fannie Mae Foundation/NBA Home Team Awards (for affordable housing);
- 1997 by the US Dept. of Housing and Urban Development with the John J. Gunther Blue Ribbon in Community Development, a.k.a. the HUD Best Practices Award (for the shopping center); and
- 1998 by the Federal Home Loan Bank with the Community Partners Award (for affordable housing development)

Lecturer and Visiting Assistant Professor of Geography and Urban Planning, UNCC Dept. of Geography and Earth Science, 1990 – Present

I offered instruction to undergraduate and graduate students at both the introductory and advanced level in the areas of environmental planning, location theory, transportation planning, urban planning theory and practice, and community economic development. This experience has included jointly offered courses with the faculty of Architecture Department (Community Planning Workshop) and the Geography Department (Public Transportation), numerous planning related independent study courses and service as a graduate faculty representative on several masters level student advisory committees.

Operations Manager, First Colony Homes, 1986 – 1988

I was responsible for starting a single-family home building company from scratch. As the company's first employee, I was responsible for original market analysis, product development, vendor and subcontractor selection/coordination, budgeting, developing operational systems detail (excluding sales), setting up computer-based job costing and production tracking systems and managing all production and operations personnel (10-15 persons). This resulted in a half dozen subdivisions scattered over all sectors of

Mecklenburg County and accounting for several hundred new homes ranging in sales prices from \$65,000 to \$150,000.

Project Manager/Office Manager, Mulvaney Builders-UDC Homes, 1985 – 1986

My primary responsibility was planning coordination for a 386-acre residential proposal for 1,200+ single-family homes, known as Cameron Woods. Responsibilities also include supervision of central office staff work in purchasing, costs estimating, and administrative start processing for single-family and multi-family developments. I also shared job costs analysis and budgeting duties with the Vice President.

Principal Policy Planner, Charlotte-Mecklenburg Planning Commission, 1979 – 1985

I was responsible for personally performing and managing a staff of 4 professional planners involved in advanced technical work in the areas of drafting and revising the City/County zoning ordinances and the evaluation and review of project development and design proposals (single-family, multi-family and uptown). I was also responsible for staffing various citizen committees and leading numerous interdisciplinary teams of municipal technicians convened to handle special projects, including churches and other institutional uses in residential districts, hazardous material handling and treatment facilities, outdoor sign regulations, suburban mixed use development districts, etc.

Transportation Planner, Charlotte-Mecklenburg Planning Commission, 1973 - 1979

In my first professional job after completing my first graduate degree, I was responsible for coordinating thoroughfare planning, evaluating the impacts of proposed land use changes on the transportation system (using the then new critical movement intersection analysis techniques of Henry B. McNerney and Stephen G. Peterson) and providing staff support to the Metropolitan Planning Organization (MPO). This latter group is the intergovernmental transportation planning policy body for the Charlotte-Mecklenburg region composed of elected representatives from the jurisdictions within the planning area.

PROFESSIONAL ASSOCIATIONS AND MEMBERSHIPS

Member, American Institute of Certified Planners (member of AICP Ethics Committee and Ethics Revision Procedures Subcommittee)

Member, American Planning Association

Member, Lambda Alpha International (An Honorary Land Economics Society)

Associate Member, Urban Land Institute

PUBLICATIONS AND RESEARCH

“Decision-Making and Transportation Planning: Two Case Studies in Charlotte-Mecklenburg” (Masters thesis, MUA Program, UNCC, 1978)

Working papers distributed through the American Planning Association’s “Lending Library”, 1978-85

1. Central Area Pedestrian Trip Generation Study
2. Neighborhood Commercial Functions
3. Architectural Compatibility and Infill Housing
4. Commercial Growth Characteristics and Highway Interchange Design/Location
5. The Role of Accessibility in the Growth and Distribution of Industrial, Commercial, Office and Residential Uses
6. Planning and Citizen Participation: Factors Significant in the Two Processes

“An Evaluation of a Youth Gang/Drug Prevention Program in Charlotte, North Carolina, 1990-1993”, a study done for the Mecklenburg County Health Department

“An Evaluation of the Violence Prevention Curriculum for Adolescents in the Charlotte-Mecklenburg Public Schools, 1990-1991” a study done for the Mecklenburg County Health Department

“Universities and Community Development: Three Case Studies from North Carolina”, Carolina Planning Magazine, Vol. 19, No. 1, 1993

“Developing a Typology of Post-Bellum, African-American Neighborhoods in the American South” co-authored with Dr. Gerald Ingalls (UNC Charlotte), presented at the 53rd Meeting of the American Association of Geographers, Southeastern Division, Memphis TN, November 1998.

“The Role of Historically Black Colleges and Universities in Community Development” presented at the DuBois Institute Spring Conference; April 1, 2003 at Clark Atlanta University.

Regular contributions to the Charlotte area quarterly publication, Business Properties, as the column “From the Planner’s Perspective”

1. “The Economic Benefits of Open Space” (Vol. 19, No. 3, Winter 1998-99)
2. “The History and Future of Community Economic Development” (Vol. 20, No. 1, Issue 68, Spring 1999)
3. “Affordable Housing: Not Just the Problem of the Poor” (Vol. 20, No. 1, Issue 70, Summer 1999)
4. “Historic Preservation: A Working Example of Profiting While Doing Good”, (Vol. 20, No. 2, Issue 71, Fall 1999)
5. “Economic Revitalization” (Vol. 20, No. 3, Issue 72, Winter 2000)
6. “Adaptive Reuse: The Flip Side of Sprawl, ‘Dumb Growth’ and Urban Disinvestment” (Vol. 20, No. 1, Issue 73, Spring 2000)
7. “Observations on Zoning and Planning in Charlotte” (Vol. 21, No. 2, Issue 74, Summer 2000)
8. “Business Improvement Districts – Government at the Grassroots” (Vol. 21, No. 3, Issue 75, Fall 2000)
9. “Transit-Oriented Development: Self-Imposed Discipline in a Free-Market Economy” (Vol. 21, No. 4, Issue 76, Winter 2001)
10. “Public Schools and Public Planning: The Challenge to Do the Right Thing for the Right Reason” (Vol. 22, No. 1, Issue 77, Spring 2001)

SUMMARY OF SELECT COMMUNITY ECONOMIC DEVELOPMENT PROJECTS

1. Planned and developed over 200 units of affordable housing in the NW Corridor neighborhoods of Charlotte including new construction for sale, rehabilitated units for rent, and new construction for households at 60% and 80% of area median income and for elderly special needs population (1991-98)
2. Planned and developed a 30,000 square foot office facility (at Beatties Ford Rd. and W. Trade St.) in partnership with Johnson C. Smith University that was eventually sold to Carolinas Healthcare Systems for use as a freestanding medical clinic (1997)
3. Conducted a segmented market analysis for and organized a public-private partnership that developed a 55,000 square foot shopping center, University Village Shopping Center at Beatties Ford Rd. and LaSalle St. (1996)
4. Consultations for the Charlotte Mecklenburg Schools’ Planning Division (1999 to 2004) including projects
 - projecting student population increases, age cohorts, and grade levels by Origin & Destination zones for 5, 10, 15 and 20 year horizons
 - projecting annual student population increases, age cohorts, and grade levels by Origin & Destination zones

- evaluating placement and probable student body composition of new school facilities in suburban areas
 - critically evaluating student population projection methods available to the Planning Division
 - evaluating and adapting the parental choice student assignment plans in Ft. Myers and Port Saint Lucie (FL) for use in Charlotte-Mecklenburg
 - facilitating an interdisciplinary team work (City/County Planning, Parks/Recreation, Libraries, CDOT, CMS, etc.) to plan, design and schedule construction on Greenway Park/Walter G. Byers and Craighead/Highland Renaissance Elementary Schools on a tight timetable
5. Produced segmented market analysis for commercial development in the South Church Street Corridor under contract for the Spartanburg (SC) City Department of Community Development (2001 - 03)
 6. Undertook land use and environmental planning as part of environmental remediation and brownfield reuse effort with an interdisciplinary team (led by Khalsa Design of Cambridge MA) for the Arkwright dump/ReGenesis Environmental Justice Project in Spartanburg (SC) under contract for the Spartanburg County Department of Community and Economic Development (2001 - 04)
 7. Produced a study of community economic development options and alternatives for the Office of the Mecklenburg County Manager including a comprehensive literature review of best management practices, a gap analysis to define those areas not adequately addressed by the County and its agents, and a recommendation for realigning their community development efforts with an emphasis on the County's present human services efforts. (2003)
 8. Produced a strategic assessment for the Goler CDC (Winston-Salem) and detailed development project work programs for the Goler and S.G. Atkins CDCs (Winston-Salem) after guiding their boards of directors through retreat exercises and working with staff to generate detailed strategies to implement the visions articulated during those retreats. (2004)
 9. Participated as a resource team member in the Knight Foundation-sponsored Urban Open Space Leadership Institute with the College of Architecture at the University of NC at Charlotte for the 14 county region surrounding Charlotte focusing on open space and community economic development (2004)
 10. Assisted Livingstone College (Salisbury NC) in the production of a successful HUD HBCU \$340,000 grant application to fund community development activities (2004)
 11. Produced sections of a governance study for the Charlotte Area Transit System under the auspices of the UNC Charlotte Public Policy Ph.D. Program (2003 - 04)
 12. Assisted the Salisbury (NC) Planning Department with the production of their 2005-2010 Consolidated Plan for affordable and workforce housing (2005)
 13. Produced marketing and finance business plan elements for the A.G. Atkins CDC, Southside CDC and Liberty CDC in Winston-Salem (NC) under contract with LISC (2005)
 14. Produced strategic business plan for the SC Association of Community Development Corporations (2005)
 15. Produced case for support to encourage \$1 million investment by the Santee Cooper-SC Association of Electric Cooperatives in the SC Association of Community Development Corporations (2005)

16. Produced multi-part online course, "Strategic Planning for Community Housing Development Organizations" under contract to Training Development and Associates for the US Department of Housing and Urban Development (2006)
17. Evaluated North Carolina community development corporations receiving funding from the Z. Smith Reynolds Foundation as part of the JFK Consulting Group Inc. team (2006 - 07)

Related Courses and Seminars Taught

1. Community Economic Development (Community Revitalization), graduate course in the Department of Geography at the University of North Carolina at Charlotte
2. Urban Planning: Practice and Theory, graduate course in the Department of Geography at the University of North Carolina at Charlotte
3. Community Planning Workshop, graduate course in the Department of Geography team-taught with the College of Architecture at the University of North Carolina at Charlotte
4. Environmental Planning, Urban Transportation Problems, The City and Its Region, Urban Political Geography, and Location of Human Activity - undergraduate courses in the Department of Geography at the University of North Carolina at Charlotte
5. Guest lectures on development economics and affordable housing production in Real Estate Development, graduate course in the Department of Finance and Business at the University of North Carolina at Charlotte
6. Advanced Topics in Affordable Housing Course offered for the Federal Home Loan Bank of Atlanta in their Historically Black Colleges and Universities Program at Dillard University (New Orleans, LA)
7. US Department of Housing and Urban Development Historically Black Colleges and University Training Seminar (New Orleans, Charlotte, Memphis, and Atlanta)
8. Seminar session on Public Policy and Planning Initiatives Affecting CDCs for the Federal Home Loan Bank of Atlanta technical assistance seminar for their Historically Black Colleges and Universities Program (Atlanta, GA)
9. Seminar session on Retail Development and Neighborhood Revitalization for the Center for Urban Redevelopment Excellence at the University of Pennsylvania (Philadelphia, PA)
10. Project/Construction Management for Branch Banking and Trust for its community-based development partners (Charlotte, Washington DC, Atlanta, Orlando, Charleston, Richmond)
11. US Department of Housing and Urban Development Historically Black Colleges and Universities Housing and Economic Development Seminars (San Antonio and Nashville)

COMMUNITY AND CIVIC ACTIVITIES

- Branch Banking and Trust Charlotte CRA Steering Committee (Member) – 2004 to present;
- North Carolina State Bar Association Council (Public Member) – 2002 to present;
- Arts and Science Council of Charlotte-Mecklenburg (Board Member, Vice Chair for Grants) – 2001 to present;
- Sugar Creek Parkway Action Committee (Committee Member) – 2002 to 2004
- Inner City Roundtable (Chamber of Commerce-sponsored interest and research group), Member and Chair, 2000 to 2001;
- Fannie Mae's Housing and Community Development Regional Advisory Council (Council Member) – 2000 to 2004
- N.C. Environmental Education Fund Board (Board Member, Treasurer, President) – 2000 to present
- Foundation for the Carolinas Board of Directors (Board Member, Distribution Committee Chair, Treasurer) - 1994 to 2001;
- African American Community Foundation Board of Directors (Board Member and Chair) – 1993 to 2000;

- Mecklenburg County Board of Elections (Board Member and Chair) – 1989 to 2003;
- Charlotte Mecklenburg Business Investment Program Committee of the Charlotte Mecklenburg Development Corporation (Committee Member) – 1999 to 2002;
- Mint Museum of Art Board of Directors (Board Member) – 1994 to 2000;
- Child Care Resources, Inc. Board of Directors (Board Member) – 1995 to 2005
- Charlotte-Mecklenburg Planning Commission (Commission Member and Chair) - 1992 to 1998;
- City of Charlotte Affordable Housing Task Force and Implementation Committee (Committee Member) – 1999 to 2001
- Mecklenburg County Transit Advisory Committee (Committee Member) - 1998
- UNCC Department of Economics Advisory Committee (Committee Member) – 1996 to 2003
- Charlotte-Mecklenburg Public Broadcasting Authority Board of Directors (Board Member and Chair) - 1985 to 1991,
- Central Piedmont Chapter of the American Society for Public Administration Board of Directors (Board Member and Chair) - 1982 to 1985,
- Charlotte Speech and Hearing Center Board of Directors (Board Member and Chair) - 1983 to 1987;
- United Family Services Board of Directors (Board Member and Chair) – 1983 to 1990
- Charlotte Community Facilities Committee for the Charlotte-Mecklenburg Utilities Department (Committee Member and Chair) – 1986 to 1990
- Leadership Charlotte Board of Directors (Board Member and Chair) – 1985 to 1990
- Teen Health Connection Board of Directors (Board Member) – 1993 to 1995
- UNCC Masters of Public Administration Alumni Board of Directors (Board Member) – 1993 to 1994
- Charlotte Symphony Orchestra Board of Directors (Board Member and Treasurer) – 1991 to 1997
- Historic Rosedale Foundation Board of Directors (Board Member) – 1996 to 1999
- North Carolina Dept. of Transportation Rail Council (Council Member) – 1995 to 1997
- United Way of the Central Carolinas Board of Directors (Allocations Committee Member and Professional Division Solicitation Chair) – 1988 to 1992
- City of Charlotte Budget Advisory Committee (Committee Member) – 1989 to 1992
- Mecklenburg County Blue Ribbon Bond Committee (Committee Member) – 1989
- NationsBank Charlotte Advisory Board (Board Member) – 1993 to 1996
- WDAV Public Radio Station Board of Directors (Board Member) – 1991 to 1995
- FOCUS 2010 Strategic Planning Committee (Phase I Committee Member, Phase II Chair) – 1992 to 1995
- Arts and Science Council Board of Directors (Board Member and First Night Event Chair) – 1986 to 1991
- Mecklenburg County Council, Boy Scouts of America Board of Directors (Board Member and Eagle Scout Review Committee Chair) – 1980 to 1990
- Johnson C. Smith University Board of Visitors (Board Member) – 1982 to 1985
- Science Museums of Charlotte Board of Directors (Board Member and Building Committee Chair) – 1978 to 1984
- Planned Parenthood USA (National) Board of Directors (Board Member) – 1983 to 1985
- Planned Parenthood of Greater Charlotte Board of Directors (Board Member) – 1978 to 1982
- Charlotte Harvard Alumni Club (President) - 1981
- Charlotte Dartmouth Alumni Club (President) – 1979

HONORS AND RECOGNITIONS

Civic and Community

Isaac Heard, Jr.

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1. The Royal Insurance 1996 Spirit Award for leadership in the arts;
2. The Leadership Charlotte 1997 Circle of Excellence Award for leadership in civic affairs;
3. The Alpha Kappa Alpha Sorority 1997 PEARL (*Pursuit of Excellence in Achievement through Responsive Leadership*) Award for leadership in business affairs;
4. The Charlotte Observer's 1998 Heroes of Democracy Award for leadership in civic affairs;
5. The 1998 Ash-Shaheed Islamic Center Torch Bearer of Excellence Award for outstanding service to business and community;
6. The Charlotte Post's 1998 Newsmaker Award for community service; and
7. The 2000 Charlotte Post People of Prominence Award.

Community Economic Development

1. National League of Cities Partnership Award for University Village Shopping Center (1996)
2. Fannie Mae Foundation/NBA Home Team Award for Dundeen Homes affordable housing rehabilitation project (1997)
3. Fannie Mae Foundation/NBA Home Team Award for French Square new affordable housing construction project (1998)
4. U.S. Dept. of Housing and Urban Development's John J. Gunther Blue Ribbon in Community Development (a.k.a. the HUD Best Practices Award) for the University Village Shopping Center (1997)
5. Federal Home Loan Bank Community Partners Award for Dundeen Court affordable rental housing rehabilitation project (1998)
6. Seedco (*Structured Employment/Economic Development Corporation*) Distinguished Service Award for work in community economic development (1999)