

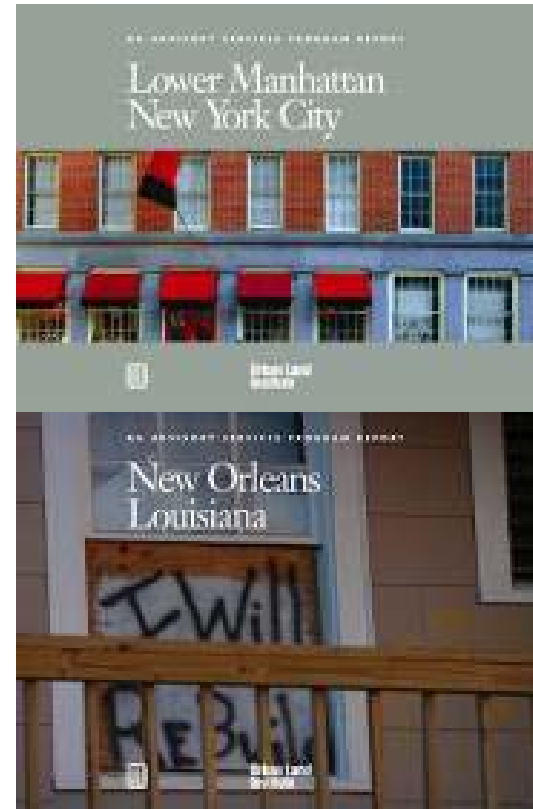


# TAPs Webinar: Defining the Scope of the Assignment

September 14, 2009

## Overview

- Why we do Advisory Service Panels and TAPs?
- TAPs Definition
- TAPs Characteristics
- Issue of Scope
- Examples of Scopes
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## Why We Do Panels?

- Provides strategic advice to help communities address key land use and real estate issues.
- Allows members to participate and learn by being drawn into problem solving exercise.
- Improves membership and builds awareness of the ULI mission
- Provides a sounding board for cutting edge issues such as sustainability and other urban policies
- Generates revenue

## TAPs Characteristics

- Managed by District Councils
- Panelists from District Councils
- 1-2 Days Format
- Questions are answerable in 1-2 Days



## Steps in the TAPs Process

- Sponsor requests TAP
- **District Council negotiates scope of the assignment**
- District Council recruits TAPs members
- District Council asks sponsor to prepare briefing book, stakeholder interviews and receptions
- TAP panel meets
- TAP panel makes presentation
- As appropriate, District Council write final report
- District Council sends report/PowerPoint to ULI Georgetown

## Challenges Associated with Defining Scope

- Questions too broad for 1-2 day panel
- Questions require national expertise
- Questions unrelated to land use
- Questions too political
- Matching panelists with assignment



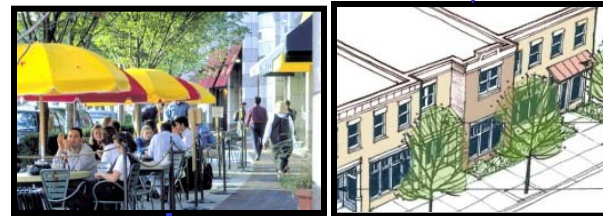
# Structure of Scope

Vision, Goal & Objectives



Questions are often organized in a linear framework, grounded in the market realities of the real estate market; thus:

- Market potential
- Development strategies
- Planning and design options
- Implementation plan



## Advice for Negotiating Scope

1. Ask sponsor for concise statement on issue and questions to be addressed
2. Provide sponsor with examples
3. Meet with the sponsor face to face
4. Be willing to decline TAP request if the issue is not land use related or a political hot potato
5. Seek advice from ULI Georgetown about the possibility of a blended national/local collaboration if national expertise is needed
6. Vet issues with TAP committee

## Example First Step – New Orleans Schools

### 1. Statement of the issue

Orleans Parish Schools (OPS) owns 62 underutilized properties throughout New Orleans. In 2008, OPS completed a master plan for the New Orleans public school system and identified these properties as surplus. RSD, OPS, and the Department of Homeland Security asked the Urban Land Institute to convene an advisory services panel to identify best practices in adaptively using schools and recommend specific strategies for advancing the redevelopment efforts.

### 2. Assignment Questions:

- What five school adaptive use case studies could the sponsor consider as useful analogs for the redevelopment of the schools in New Orleans? (ULI will prepare these case studies in advance of the panel.)
- OPS has had limited success in selling the surplus schools at the independently appraised prices. Other than appraisal, what options could the sponsors consider using to establish a fair price for each property?
- What types of business models (i.e. joint ventures, sale, lease, etc.) have worked well for school adaptive projects and should be considered by the sponsors?

## ULI Los Angeles: MLK Hospital TAP



## ULI Washington: Ft. Totten TAP



## ULI Chicago: Process for finalizing TAP scope



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## Discussion



## Resources

[www.uli.org/CommunityBuilding/AdvisoryService/TechnicalAssistancePanels/Resources](http://www.uli.org/CommunityBuilding/AdvisoryService/TechnicalAssistancePanels/Resources)