

**TAPs/Advisory Services Task Force
Final Report
April 2009**

Executive Summary

Objectives

- Review and update the 2001 TAPs Guidelines
- Develop recommendations for strengthening the District Council TAP programs
- Improve the synergy between the TAP programs and the Advisory Services Program (ASP).

Findings

- The number of District Councils with TAP programs has grown dramatically in recent years.
- TAPs have become a popular and effective means to actively engage local members, allow ULI members to give back to their community and continue their professional development, attract new members, and increase revenue.
- District Council TAP programs generally conform to the 2001 Guidelines, but also have varied from the Guidelines in several respects:
 - The scope of a growing number of TAPs assignments requires more than a one day panel, as advised by the Guidelines.
 - In some cases, District Councils have recruited panelists from outside their region to serve on a TAP panel. The Guidelines advise District Councils to use local members for TAPs.
 - Some District Councils offer TAPs with all Young Leader panelists.
- TAPs programs vary from District Council to District Council in a number of ways not addressed by the 2001 Guidelines. For example, District Councils manage their TAPs programs under different committee structures, employ a variety of

marketing techniques, produce reports of varying lengths and formats, and charge a wide range of fees.

- There is a need to ensure protection of the well established ULI brand associated with the Advisory Services Program, to clarify the relationship between TAPs and the Advisory Services program and to leverage the impact of the national program with local District Council TAP opportunities and vice versa.

Recommendations

The Task Force made recommendations in five areas:

1. Quality Assurance,
2. Support to the District Councils,
3. Fees and Pricing,
4. Distinction between Technical Assistance Panels and an Advisory Services Panels, and
5. Opportunities for Collaboration between the ASP and TAP programs.

1. Quality Assurance

- a. TAP Chairs: Chairs of TAP panels should be ULI members with experience serving on a national Advisory Services Panel, or, if a national Advisory Services panelist is not available, have experience chairing or serving on a TAP. District Councils should ensure that all TAP chairs have the leadership capabilities and style necessary to direct the panel process, assign tasks, broker disagreements within the panel and act as a spokesperson to the sponsor, the public and the press.
- b. TAPs Panelists: Each District Council should have the flexibility to recruit panelists in a manner that fits its own circumstances. Panel make-up and size should be dictated by the TAP subject matter. In general, TAP panels should consist of no fewer than three members and no more than six. District Councils should recruit panelists who are primarily from the District Council area. Recruiting from outside the District Council region may erode the distinction between a national Advisory Services Panel and a TAP. Under limited and appropriate circumstances, panels may include an individual from outside the immediate District Council area or someone who is not a ULI member, when a panel assignment requires a certain expertise not available among the ULI membership.

Young Leaders may be included on a TAP panel as a way of preparing more members to serve on future TAPs. If a District Council decides to organize a panel of all Young Leaders, a full member must serve as an advisor. If the panel is comprised of all Young Leaders, District Councils should ensure that the panelists have appropriate skills and experience to fulfill the panel assignment, notify the

sponsor in advance that this is a Young Leader panel and reference this in the report.

- c. **Conflicts of Interest:** District Council should ensure that there are appropriate conflict of interest disclosures by members who serve on TAP panels and that the panel's unbiased and objective character is not compromised. Members who work in any segment of the land use profession (whether public or private) must have no conflict of interest, including actual or perceived monetary, decision influencing and/or decision making interest in the TAP assignment. Panelists must also agree to refrain from soliciting work from the sponsor for the 6 -12 months following the assignment and should notify District Council leaders before accepting an offer of work. A conflict of interest statement, similar to the one sometimes used for Advisory Services panels, should be signed by all TAP panelists.
- d. **Use of ULI Corporate Identify and Report Format:** District Councils should have the flexibility to determine what the TAP deliverables will be and in what format. However, all deliverables should adhere to ULI standards in terms of appearance, presentation and quality. All TAPs written reports and PowerPoint presentations should adhere to ULI's Graphic Identify Guidelines.
- e. **TAP Evaluations:** District Councils should formally solicit feedback from sponsors and panelists, using evaluation forms similar to those used for Advisory Services panels.

2. National Support

National ULI staff should provide guidance and advice to District Councils on TAP administration and quality control. The assistance should acknowledge the creativity and resourcefulness of District Councils and facilitate the sharing of innovations and best practices among District Councils. National support to TAPs should include:

- A TAP orientation for District Councils undertaking TAPs for the first time
- Information on the full menu of services offered by Advisory Services
- Best practices for organizing a District Council TAP program
- Examples of quality written reports and other deliverables.
- Website access to a repository of TAP and Advisory Services reports and examples of District Council TAP materials. As ULI upgrades its website capabilities, both Georgetown and District Council staff will be able to and should update the website on a regular basis.

Fees and Pricing

District Councils should have the flexibility to set the price for their TAP services. Georgetown staff should collect information on District Councils fees for TAPs, in terms of length, deliverables and other basis for the pricing policy. As ULI's website capabilities increase, District Council staff will be able to update this information on a regular basis.

3. Advisory Services Panels and Technical Assistance Panels

There should be a clear distinction between national Advisory Services panels and local TAPs panels. There should also be ongoing opportunities to offer potential sponsors "blended" programs that combine the characteristics of both.

- a. **Scope:** The scope of the assignment is the key distinction between TAPs and Advisory Service Panels. Advisory Services Panel assignments are broader in scope and/or require expertise from outside the region to ensure the right combination of knowledge and expertise is available or, in some cases, to ensure that there is no question of objectivity. Generally, national panels are asked to address several different topics or issues including market analysis, development strategy, planning/design, and implementation. TAPs have a much narrower scope, which can generally be addressed fully by fewer panelists in no more than two days.
- b. **Panelists:** Advisory Service assignments involve panelists from around the country, or internationally and do not include local representation. TAPs include panelists from within the region, or occasionally from an immediately adjacent District Council. Advisory Services assignments can have from two to ten panelists. Because of the narrower scope, TAPs generally include no more than four to six panelists.
- c. **Length:** Given the narrower scope of assignment, the Task Force recommends that TAPs should not exceed two days. Most Advisory Services assignments are 3 – 5 day sessions.

4. Opportunities for Collaboration—"Blended" Assignments

The Advisory Services Program should be recognized as a ULI service that offers a continuum of products to meet sponsors' needs, ranging from partial and one-day TAPs, with panels of local members, to five-day Advisory Services Panels, with panelists drawn from the national membership. For each "product" on the continuum, there is an opportunity for District Councils and national staff to collaborate. These opportunities should be explored and developed and marketed to potential sponsors.

Next Steps for Implementation

ULI Community Outreach staff will:

1. Circulate the Task Force report to District Council leadership and staff and host a follow up conference call to review the recommendations and brainstorm ways to develop new “blended” assignments.
2. Update the 2001 Guidelines to reflect the recommendations of the Task Force announce the changes in *News You Can Use* and post them on the District Council Resources webpage.
3. Organize a conference call for interested District Councils to begin to offer technical assistance on setting up and managing TAPs.
4. Update the resource materials that ULI offers to District Councils on TAPs models.

Recommendations of the TAPs/Advisory Services Task Force April, 2009

Task Force

In April 2008, at the direction of the ULI in the Community Advisory Group, the Technical Assistance Program (TAPs) Task Force was formed to review the 2001 TAPs Guidelines and develop recommendations for strengthening the District Council TAP programs and improving the synergy between the TAP programs and the Advisory Services Program (ASP). The task Force met four times, three times by conference call and once at the ULI Fall Meeting in Miami. Final recommendations will be presented to the Advisory Group at the 2009 Spring Council Forum in Atlanta.

Members of the Task Force include: Dan Van Epp, Chair; Phyllis Alzamora (ULI Orange County); Don Carter (ULI Pittsburgh); John Mays (ULI Chicago); Alex Rose (ULI Los Angeles); and Doug Wrenn (ULI Washington).

Background

In 2001, a Task Force of ULI member prepared a set of TAP guidelines for District Councils. (See attached) The guidelines were designed to “provide District Councils with flexibility in developing a TAP program while maintaining the high quality of the Advisory Services Program for which ULI is known.” The number of District Councils with TAP programs has grown dramatically from two or three in 2001 to 15 District Councils, which are expected to complete 38 TAPS, in FY 2008.

These numbers are expected to continue to increase. The TAPs program has become a popular and effective means to actively engage local members in the District Council’s execution of ULI’s mission, to allow ULI members to give back to their community and to continue their professional development. The program also provides an opportunity for the District Councils to exercise their commitment to leadership in land use in the community, to attract new members and to increase revenue.

Over time the District Council programs of work have incorporated the TAP program in different ways. TAP programs generally conform to the 2001 Guidelines, but also have varied from the Guidelines in several respects:

- The scope of a growing number of TAPs assignments requires more than a one day panel, as advised by the Guidelines.
- In some cases, District Councils have recruited panelists from outside their region to serve on a TAP panel. The guidelines advise District Councils to use local members for TAPs.

- Some District Councils offer TAPs with all Young Leader panelists.

In addition, the TAP programs vary from District Council to District Council in a number of ways not addressed by the 2001 Guidelines. For example, District Councils manage their TAPs programs under different committee structures, employ a variety of marketing techniques, produce reports of varying lengths and formats, and charge a wide range of fees.

With the rapid growth in District Councils over the past five years, as well as a growing interest in the TAP program, there is a need to ensure protection of the well established ULI brand associated with the Advisory Services Program, to clarify the relationship between TAPs and the national Advisory Services program and to leverage the impact of the national program with local District Council TAP opportunities and vice versa.

Recommendations

The Task Force recommends that the 2001 guidelines be modified to address:

- I. Quality Assurance,
- II. Support to the District Councils,
- III. Fees and Pricing,
- IV. The Distinction between Technical Assistance Panels and an Advisory Services Panels, and
- V. Opportunities for Collaboration between the Advisory Services and TAP programs.

The Task Force recommendations are listed below:

I. Quality Assurance

1. TAP Chairs

The TAP Chair plays a critical role in producing a quality TAP, including a final report or other deliverable. The Task Force recommends that the chairs of all TAP panels be ULI members with experience serving on a national Advisory Services Panel, or, if a national Advisory Services panelist is not available, have experience chairing or serving on a TAP. The Task Force also recommends that District Councils ensure that all TAP chairs have the leadership capabilities and style necessary to direct the panel process, assign tasks, broker disagreements within the panel and act as a spokesperson to the sponsor, the public and the press.

2. Panelists

Each District Council should have the flexibility to recruit panelists in a manner that fits its own circumstances. Panel make-up and size should be dictated by the TAP subject matter, but in general, TAP panels should consist of no less than three members and no more than six. The Task Force recommends that District Councils recruit panelists who are primarily from the District Council area. Recruiting from outside the District Council region may erode the distinction between a national Advisory Services Panel and a TAP. Under limited and appropriate circumstances,

panels may include an individual from outside the immediate District Council area or someone who is not a ULI member, when a panel assignment requires a certain expertise not available among the ULI membership.

Young Leaders may be included on a TAP panel as a way of preparing more members to serve on future TAPs. However, if a District Council decides to organize a panel of all Young Leaders, a full member must serve as an advisor. The Task Force recommends that, if the panel is comprised of all Young Leaders, District Councils should protect the ULI brand by ensuring the panelists have appropriate level of skills and experience to fulfill the panel assignment and by notifying the sponsor in advance and referencing in the report that the panelists are Young Leaders.

3. Conflict of Interest Statements

Objectivity is an essential feature of the ULI Advisory Services Program. The Task Force recommends that each District Council be responsible for ensuring that there are appropriate conflict of interest disclosures by members who serve on TAP panels and that the panel's unbiased and objective character is not compromised. Members who work in any segment of the land use profession (whether public or private) must have no conflict of interest, including actual or perceived monetary, decision influencing and/or decision making interest in the TAP assignment. Panelists must also agree to refrain from soliciting work from the sponsor for the 6 -12 months following the assignment and should notify District Council leaders before accepting an offer of work. The Task Force recommends that a conflict of interest statement, similar to the one sometimes used by Advisory Services panels, should be signed by all TAP panelists.

4. Use of ULI Corporate Identify and Report Format

District Councils should have the flexibility to determine what the TAP deliverables will be and in what format. However, all deliverables should adhere to ULI standards in terms of appearance, presentation and quality. The Task Force recommends that all TAPs written reports and PowerPoint presentations adhere to ULI's Graphic Identify Guidelines.

5. TAP Evaluations

District Councils should formally solicit feedback from sponsors and panelists, using evaluation forms similar to those used for Advisory Services panels.

II. District Council Support

The Task Force recommends that national ULI staff provide guidance and advice to District Councils on TAP administration and quality control. The assistance should acknowledge the creativity and resourcefulness of District Councils and facilitate the sharing of innovations and best practices among District Councils. This peer to peer learning is a very powerful and effective learning tool, especially for sharing operational details and experience, where practices may vary from a national panel.

The Task Force recommends that Georgetown staff provide District Councils with TAP support, including:

- A TAP orientation for District Councils undertaking TAPs for the first time;
- Information on the full menu of services offered by Advisory Services ;
- Best practices for organizing a District Council TAP program;
- Examples of quality written reports and other deliverables; and
- Provide website access to a repository of TAP and Advisory Services reports and examples of District Council TAP materials. (As ULI upgrades its website capabilities, both Georgetown and District Council staff will be able to, and should update the website on a regular basis).

III. Fees and Pricing

The Task Force recommends that District Councils have the flexibility to set the price for their TAP services. The Task Force also recommends that Georgetown staff collect information on District Councils fees for TAPs, in terms of length, deliverables and other basis for the pricing policy. As ULI's website capabilities increase, District Council staff will be able to update this information on a regular basis.

IV. Advisory Services Panels and Technical Assistance Panels

The Task Force recommends that there be a clear distinction between national Advisory Services panels and local TAPs panels. However, there should also be ongoing opportunities to offer potential sponsors "blended" programs that combine the characteristics of both for a new "Advisory Services" model.

- **Scope:** The scope of the assignment is the key distinction between TAPs and Advisory Service Panels. Advisory Services Panel assignments are broader in scope and/or require expertise from outside the region to ensure the right combination of knowledge and expertise is available or, in some cases to ensure that there is no question of objectivity. Generally, national panels are asked to address several different topics or issues including market analysis, development strategy, planning/design, and implementation. TAPs have a much narrower scope, which can generally be addressed fully by fewer panelists in no more than two days.
- **Panelists:** Advisory Service assignments involve panelists from around the country, or internationally and do not include local representation. TAPs include panelists from within the region, or occasionally from an immediately adjacent District Council. Advisory Services assignments can have from two to ten panelists. Because of the narrower scope, TAPs generally include no more than four to six panelists.
- **Length:** Given the narrower scope of assignment, the Task Force recommends that TAPs should not exceed two days. Most Advisory Services assignments are 3 – 5 day sessions.

V. Opportunities for Collaboration—“Blended” Assignments

The Task Force recommends that the Advisory Services Program be recognized as a ULI service that offers a continuum of products to meet sponsors' needs, ranging from partial and one day (or more) TAPs, with panels of local members, to five day Advisory Services Panels, with panelists drawn from the national membership. For each “product” on the continuum, there is an opportunity for District Councils and national staff to collaborate. Examples below illustrate how staff at the national and District Council levels can collaborate for the benefit of the sponsor and ULI.

- **At the beginning of the TAP or Advisory Services process:**

District Councils and national staff can jointly market the full spectrum of Advisory Service products and advise sponsors to select the product that best matches sponsor needs for strategic advice. After assessing the scope of the sponsors' requests and the need for outside experts, staff can recommend an Advisory Services Panel, a TAP or a blended product, such as combinations of scoping sessions, stakeholder dialogues and panel services.

In addition, staff can work together to increase the number of members with Advisory Service Panel and TAP experience. District Council staff can identify members who would be strong Advisory Service panelists and who, once they have such experience, would be likely to lead TAPs. National staff can provide names of Advisory Service panelists who would be good TAP chairs.

- **During the TAP or Advisory Service Panel process:**

District Councils can engage in national panels in several ways. Members can provide local perspectives on the panel assignment at the Sunday dinner for a panel; provide needed expertise during the panel deliberations, or identify stakeholders to be interviewed by the panel.

National Staff can be of assistance to District Councils by providing advice on the best way to frame the questions to be addressed by a TAP and on how to manage sponsor expectations.

- **After the TAP or Advisory Services Panels have been completed:**

Where appropriate, District Councils can increase the likelihood that Advisory Services panel recommendations will be implemented. District Councils have the media relations to raise the visibility of ULI and Advisory Services Panel recommendations. They can also help build community support for the recommendations by communicating, in a variety of ways, the Advisory Services Panel recommendations to the appropriate public and private leaders in the community.

Panelists on both Advisory Services Panels and TAPs can encourage sponsors to consider follow-up Advisory Services or TAP panels. Both national and District Council staff can jointly market follow up Advisory Services by revisiting sponsors

one to two years after the assignments have been completed to review the results of panel recommendations and develop lessons learned.

Conclusion

The ULI Advisory Services Program offers a menu of services designed to provide sponsors with the quality of strategic land use advice they are seeking. The TAP program is one Advisory Services Program that is organized by District Councils to provide advice that is limited in scope and can be addressed by the expertise of the membership in the District Council area within a period of a day and a half. District Councils should be encouraged to develop quality TAP programs that meet minimum standards, but should also be given the flexibility to incorporate the program into their individual programs of work. Both national and District Council staff should be encouraged to collaborate in ways that will strengthen the overall Advisory Services program and to develop partnerships for providing blended services that meet the sponsors' needs by tapping the strengths of both the national and District Council programs. The Task Force hopes that the revised Guidelines will ensure that the TAP and Advisory Services brands are protected and that District Councils sustain well respected TAP programs.