

# Technical Assistance Program (TAPs)

# Technical Assistance Panels



# Welcome

- Meeting Objectives:
  - Review history
  - Review Task Force recommendations
  - Introduce new form of collaborative advisory services
  - Identify topics for future webinars

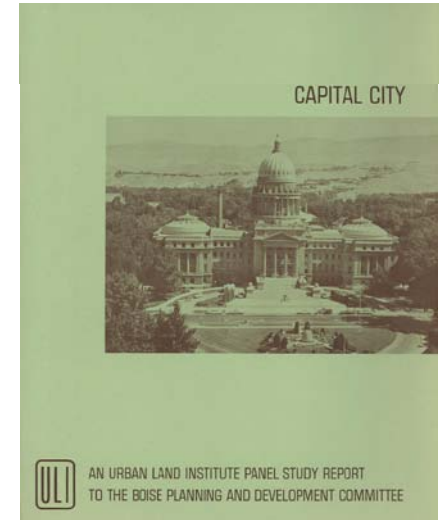
# Task Force Findings

- Number of TAP programs has grown dramatically
- District Councils generally conform with 2001 Guidelines
- District Council TAP programs vary



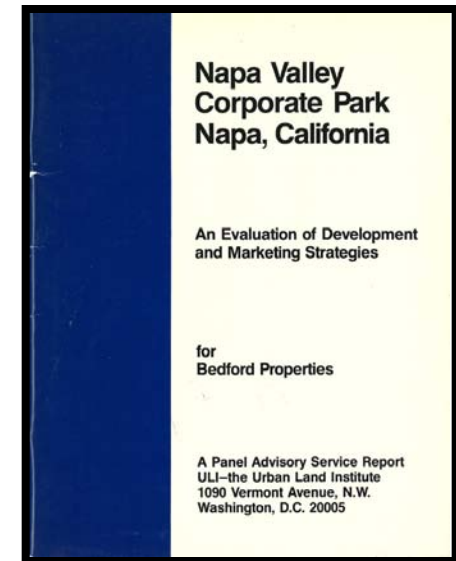
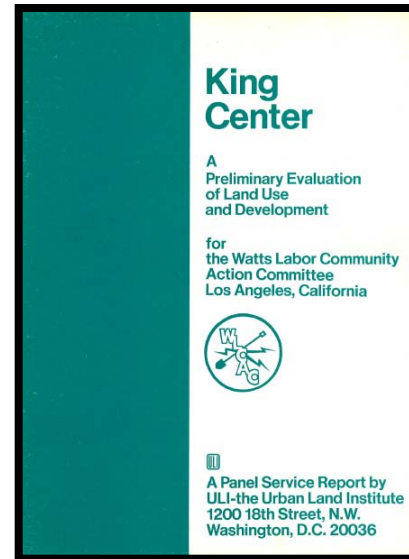
# History

- 1947 - Started as an over-the-shoulder review by members for members
- Conducted as a part of Central Business District Council and the Community Builders Council
- Early panels largely focused on either:
  - Downtown Revitalization
  - Large suburban developments
  - Private Developments



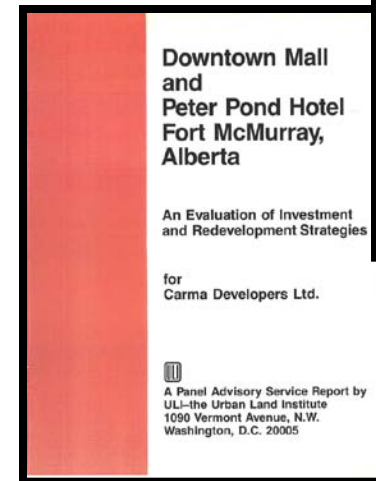
# 1960's and 1970s

- Panels began to diversify
  - Environmental Concerns
  - Urban Design
  - Historic preservation
  - PUD's
  - Economic Development
  - More Public Sponsors
- New Process
  - Formalized Agenda
  - Private and Candid Interviews
  - Social Setting with Sponsor
  - More diverse membership/expertise; not just developers
  - Briefing Materials more comprehensive
  - Written report changed from record of the proceedings to a professional report in prose; much more useful to sponsor



# 1980' s and 1990' s

- Continued Diversification of Subject Matter
- More work with City, County and National Governments as Sponsors
- Regional Organizations, Non-Profits, Corporations as Sponsors
- New Membership
- New Panel Types
  - Europe and Asia
  - Policy Workshops



# Panels Today

- Continued Diversification of Subject Matter
  - Sustainable Development
  - Workforce Housing
  - Infrastructure
  - Metropolitan Policy
  - Disaster Response
- 15-20 Panels a Year
- Emerging Trends



# Why Do Panels?

- Provides strategic advice to help communities addresses 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

# Task Force 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 Advisory Services Panels
  - 5) Opportunities for Collaboration between the ASP and TAP programs

# A TAP is...

- A 1 – 1½ day Panel
- Offered by District Council
- Scope is limited
- Panelists are from District Council region



# TAP Chairs

- Chairs of TAPS should be ULI members with:
  - Experience serving on a ASP, or
  - Experience chairing or serving on a TAP (if a ASP panelist is not available)



# TAPs Panelists

- District Councils should recruit panelists who are primarily from the District Council area (except in limited and appropriate circumstances)



# TAP Panels of Young Leaders

- Young Leaders may be included on a TAP panel
- A full member must serve as an advisor to panels of all Young Leaders



# Conflict of Interest

- Objectivity is an essential feature of the ULI Advisory Service Program
- Every panel's unbiased and objective character must be protected.

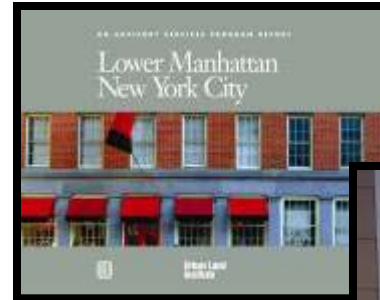


# Disclosure of Conflicts of Interest

- Panelists should sign a conflict of interest statement.
- Panelists should agree to refrain from soliciting work from the sponsor for 6 – 12 months.
- Panelists should notify District Council leaders before accepting an offer of work from sponsor.

# Report Format & ULI Corporate Identity

- All deliverables should adhere to the ULI standards and include
  - Panel date
  - Sponsor name
  - List panel members
  - Include “About ULI, Advisory Services and TAPs”



# TAP Evaluations

- District Councils should formally solicit feedback from sponsors and panelists



# District Council Support

## TECHNICAL ASSISTANCE PROGRAM



## TAPs GUIDELINES & RESOURCES

<http://www.uli.org/CommunityBuilding/AdvisoryService/TechnicalAssistancePanels.aspx>



- ULI staff should provide guidance and advice to District Councils on TAP administration and quality control.
- Opportunities should be provided for District Councils to share their best practices.

# Fees and Pricing

- District Councils may set the price for their TAP services.

Examples include:

<u>Council</u>	<u>Length</u>	<u>Product</u>	<u>Fee</u>
Arizona	1 day	No report	Pro Bono
S.E. Florida	1 ½ days	Written report	\$10,000 + hotels and meals
Washington D.C.	1 ½ days	10 copies & Electronic	\$12,000

# Distinction between A SPs and T A Ps

- Scope
- Panelists
- Length



# Distinction between ASPs and TAPs

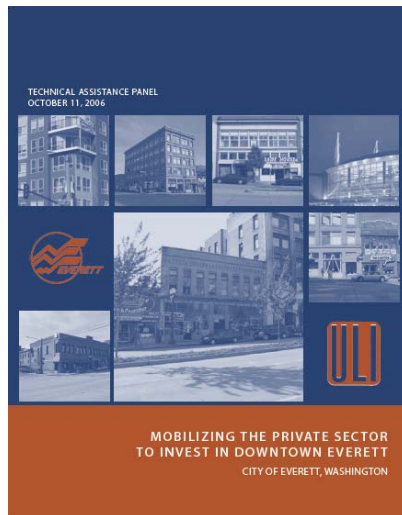
- Scope
  - ASP assignments address more than one topic or issue and require expertise from outside the region
  - TAPs have a narrower scope that can be addressed in no more than two days

# Distinction between ASPs and TAPs

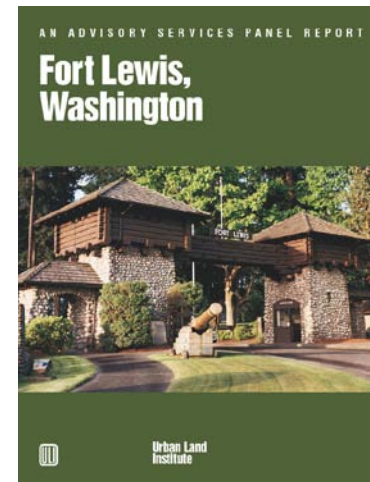
- Panelists
  - ASP assignments involve 6-10 panelists from around the country and do not include local representation
  - TAPs include 4-6 panelists from within the region or from an immediately adjacent District Council.

# Distinction between A SPs and TAPs

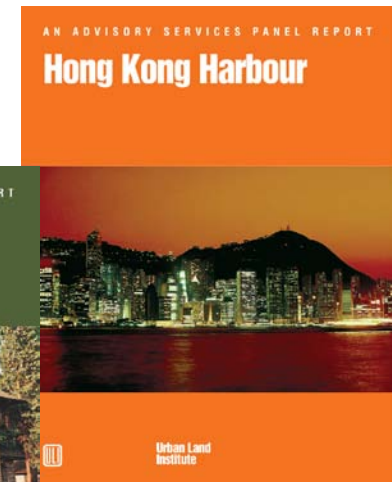
- Length
  - Advisory Services Panels: 3-5 days
  - TAPS: not more than 2 days



TAP Report



Advisory Services Panel Report

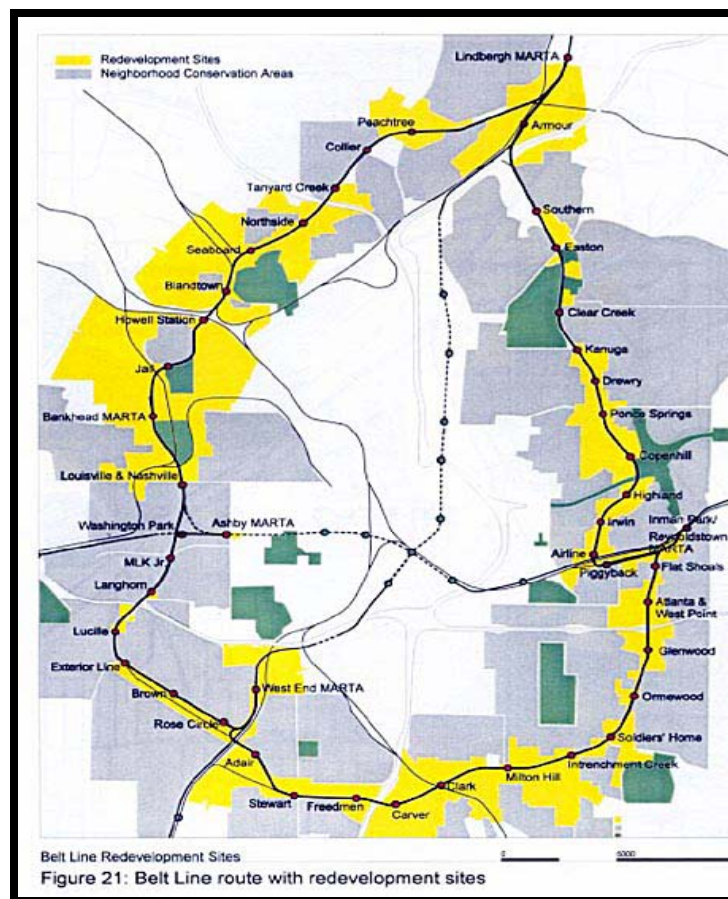


# Opportunities for Collaboration

- Blended Assignments



# Atlanta BeltLine: Redevelopment Sites



# Atlanta BeltLine: Before vs. After



# Atlanta BeltLine: “Blended” Assignment

## DATE

## ACTION STEP

May 2006

- ULI Atlanta wins BeltLine CAG.

June 2008

- ULI Atlanta completes “Blueprint” portion of CAG.

Jan 2009

- BeltLine requests ULI Atlanta’s help to promote private sector development.
  - ULI Atlanta asks ULI Georgetown for assistance.

Feb 2009

- ULI (combined) proposes “blended” assignment to BeltLine:
  1. Provide PAS at ULI Spring Council Forum in Atlanta.
  2. Follow-up survey with key local developers.
  3. Debrief summary with local developers. Next steps.

April 2009

- Deliverable #1 complete (by ULI Georgetown + ULI Atlanta).

July 2009

- Deliverable #2 to be completed (by ULI Atlanta).

Sept 2009

- Deliverable #3 to be completed (by ULI combined).

# Questions/Comments?



# Future TAPs Webinars

- Suggestions?

- 

- 

- 

- 

-

# Contact Information

- Tom Eitler  
Vice President, Advisory Services  
ULI - the Urban Land Institute  
Telephone: 202-624-7000  
E-mail: [teitler@uli.org](mailto:teitler@uli.org)
- Heidi Sweetnam  
Vice President, Community  
Phone: 202-624-7170  
E-mail: [heidi.sweetnam@uli.org](mailto:heidi.sweetnam@uli.org)
- Dana Van Galder  
Associate, Community  
Phone: 202-624-7014  
E-mail: [dvgalder@uli.org](mailto:dvgalder@uli.org)
- Caroline Dietrich  
Panel Associate, Advisory Services  
ULI - the Urban Land Institute  
Telephone: 202-624-7000  
E-mail: [caroline.dietrich@uli.org](mailto:caroline.dietrich@uli.org)