



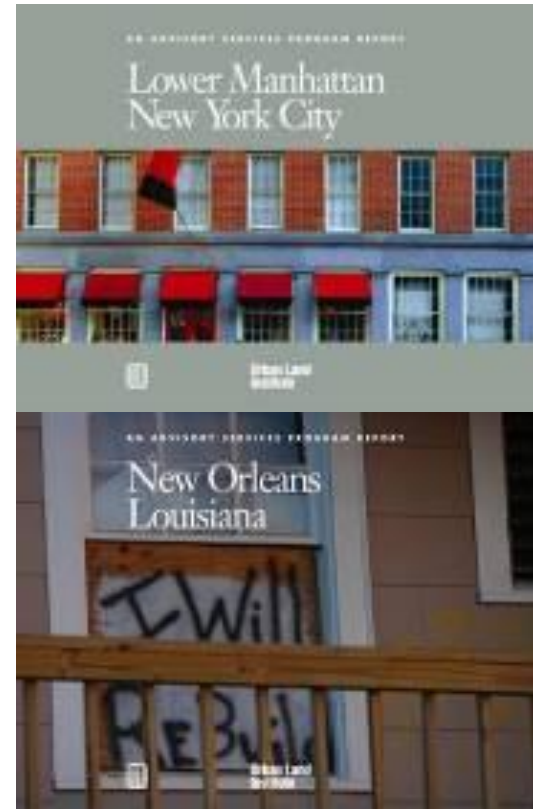
# TAPs Webinar: Best Practices for District Councils

**December 15, 2010**

<b>District Councils with TAP Committees*</b>	
ULI Atlanta	ULI New York
ULI Baltimore	ULI North Florida
ULI Boston	ULI Orange Co/IE
ULI Charlotte	ULI Philadelphia
ULI Chicago	ULI San Diego
ULI Colorado	ULI San Francisco
ULI Houston	ULI SE Florida
ULI Los Angeles	ULI Triangle
ULI Mexico	ULI Washington

**\*ULI Poll of District Councils November, 2010**

- Why Does ULI Do Advisory Service Panels and TAPs?
- TAPs Overview
- Marketing TAPs
  - ULI Orange County/Inland Empire
  - ULI SE Florida
- Tips from Other District Councils





- Provide strategic advice to help communities, companies, and organizations address key land use and real estate development issues that align with ULI's mission.
- Offer members a tremendous value-add opportunity in which they can apply their expertise to a real-world challenge, learn new skills, and increase their networks by cultivating relationships with fellow members and sponsors.
- Serve as a flagship vehicle for the ULI brand that will generate awareness, attract new members, and bolster our reputation as a premiere land use leader.
- Internally, function as a primary cross-cutting platform for various content areas and strategic partnerships with other teams and district councils.
- Generate gross revenue in accordance with the adopted budget

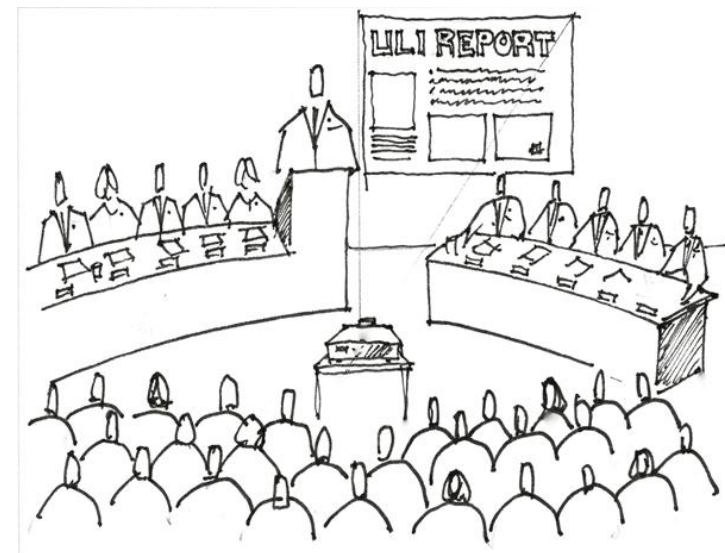
- Five Day panels
- Three day Panels
- 1.5 Day and Fellows Panels
- Special Purpose
- Video Conference
- Project Analysis Sessions
- TAPs



## Policy:

For all full-price panels

- 5-Day panel = maximum of \$10,000
- 3-Day panel = maximum of \$ 5,000
  
- There is no obligation for any additional work from District Council staff or ULI members beyond what is normally provided for a national Advisory Services panel.



## Technical Assistance Programs

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



- **District Councils market TAPs**
- 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 writes final report
- District Council sends report/PowerPoint to ULI Georgetown

Check out the ULI TAPs website for powerpoints about logistics and defining the scope of a TAP:  
<http://www.uli.org/CommunityBuilding/AdvisoryService/TechnicalAssistancePanels.aspx>

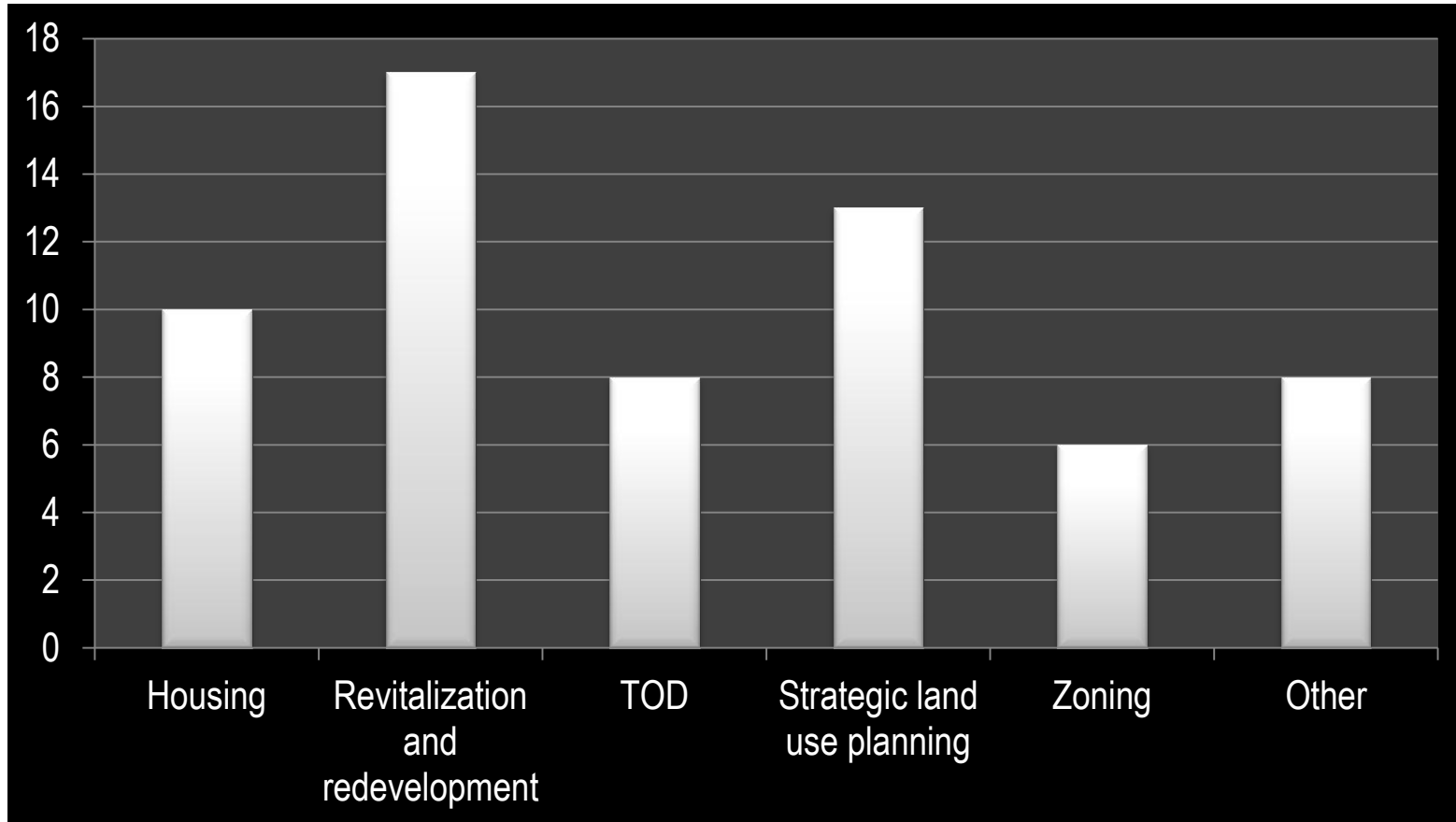
## District Council Poll of TAP Sponsors

- Public Agencies – 94%
- Private Developers – 22%
- MPO/Regional Agencies- 16%
- Transit Authority- 11%
- Non Profit- 50%

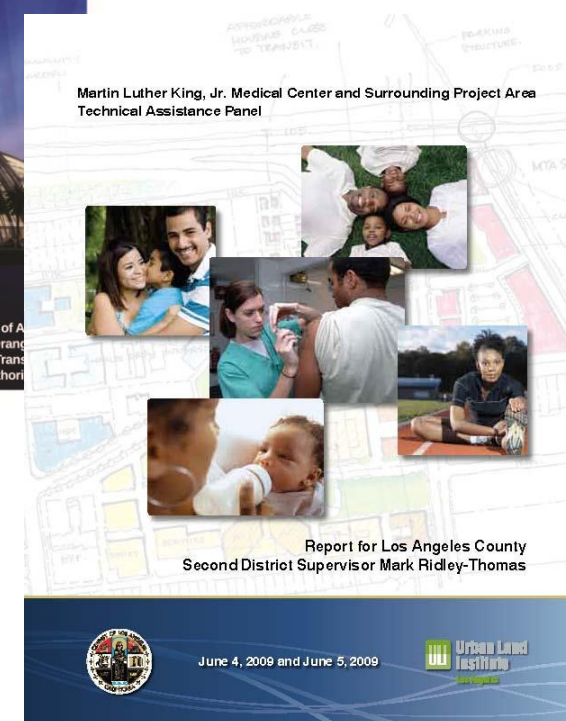
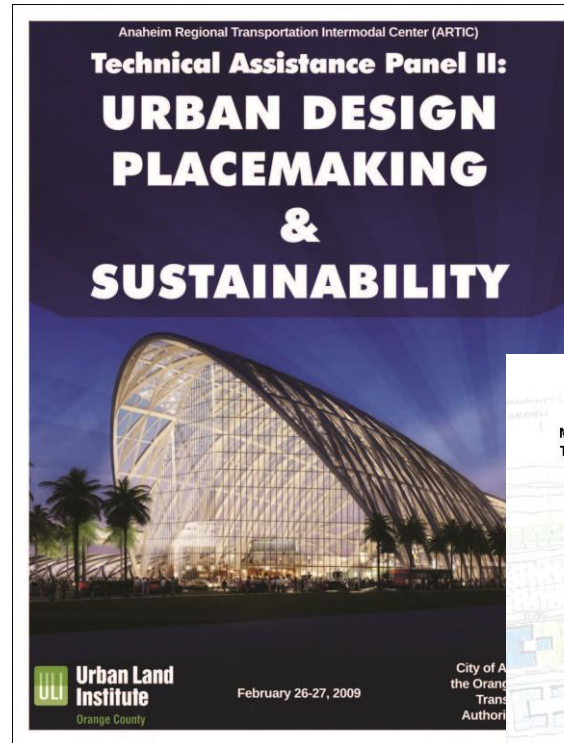
\*Results based on 18 District Council responses in November, 2010 poll.



**Around what topics has your district council held TAPs (select all that apply)?**



- Mail letter
- Poll members
- Monitor UrbanLand Online
- Read Local newspapers
- Draw on TAPs committee
- Follow up with members



- Arrange face to face appointments
- Research issues in advance
- Know the decision makers
- Bring leave behinds
- Highlight previous TAPs

## ABOUT THE URBAN LAND INSTITUTE

The Urban Land Institute (ULI) was founded in 1936 as a non-profit organization to conduct research, provide information and share best practices on all aspects of real estate development and land use policy.

Today, ULI has over 40,000 public and private sector members comprised of professionals in all aspects of real estate development, policy, and regulation. It has 66 district councils in The Americas, Europe, the Middle East and Asia, a worldwide staff of over 200, and a \$65-million annual operating budget.

The ULI Orange County is one of the 10 largest District Councils worldwide with over 1,400 members. The members of the ULI Orange County are community builders. The activities of the ULI Orange County are geared specifically towards local land use issues, but also towards issues that affect Southern California and California statewide.



## ISSUES:

Mixed-use Development, Placemaking, Urban Redevelopment, Smart Growth, Transit-Oriented Development, Sustainability, Public-Private Partnerships, Workforce Housing, Transportation, Financing.

For more information, please contact any of the following ULI members and staff:

**Co-Vice Chairs, Technical Advisory Panels**  
John McKenna, FORMA Companies  
714-673-6200

Roger Mobley, Roger W. Mobley Consulting  
949-266-7548

**Executive Director**  
Phyllis Altamora, 714-628-2856

**Director of Community Outreach**  
Ali B. Taghavi, 714-628-2856

## ULI ORANGE COUNTY

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Website: <http://orangeulicounty.org>

## TECHNICAL ADVISORY PANELS

TAPS PROVIDE OBJECTIVE, INDEPENDENT, AND PRAGMATIC ADVICE ON COMPLEX LAND USE ISSUES

## ULI Orange County



## PLANNING AND DEVELOPMENT FINDINGS AND RECOMMENDATIONS

### OVERVIEW

Since 1947, the Urban Land Institute's Advisory Services Program has been assisting communities by bringing together panels of seasoned real estate, planning, financing, marketing, and development specialists to provide unbiased, pragmatic advice on complex land use and development issues.

Panels are organized as one-day, two-day, three-day or five-day projects, depending on the complexity of the scope of work.



Former ULI Orange County Chair William Devine, Allen Maddox, presents findings at the Laguna Niguel TAP.

Panels consist of 4-8 specialists, who are ULI members volunteering their time to provide the community outreach service to help make our communities better places.

A fee is paid by the Sponsor to the ULI to cover administrative costs of the panel preparation and to support and encourage the Institute's research and educational programs.

### PANELS

The ULI Orange County organizes Technical Advisory Panels (TAPs) comprised of local ULI members, who collectively have varied and broad experience and knowledge applicable to particular problems to be considered. Panelists have experience in the planning, development and redevelopment of land and the ownership, management and financing of real property, specifically related to the designated study area. TAP panelists are screened to avoid potential conflicts of interest.

### FINAL REPORTS

Panelists visit the study area and consult with stakeholders, representatives of relevant organizations, and/or other individuals familiar with the problems involved. At the conclusion of a TAP, the panelists present their findings and recommendations in a PowerPoint presentation and at the conclusion of the assignment, provide a written report of the study. The Sponsor requesting the TAP may make such use of the report as is deemed desirable.



T to E. John Sturtevant, The Concord Group, The Jackson, LARSON AND VAIL, and Ronald Jackson, The Planning Center, participate on the Mission Viejo TAP panel.

### FEEDBACK AND RESULTS FROM RECENT PANELS:

#### City of Westminster (Oct. 2007)

"This study was long overdue. I appreciated the panel's professionalism and independent findings on the viability and sustainability of Little Saigon." - Councilman Andy Quach

#### City of Mission Viejo (April 2007)

"ULI assembled a team of experts to collaborate on a complex land use issue in the heart of Mission Viejo and provided an objective and independent analysis that was very beneficial to the City." - Chuck Wilson, Director of Community Development.

#### City of Laguna Niguel (May 2006)

"The TAP provided the City with highly professional and objective recommendations that we are using to initiate an exciting new land use plan for our Gateway Area." - Mayor Paul Glaab

- Expertise of ULI Membership
- Non-partisan recommendations
- Public presentation and report
- Catalyst



***“Word of mouth from satisfied public sector clients seems to work best.”***

Key to conducting a quality TAP: Define an appropriate scope

- Avoid questions that are too broad for 1-2 day panel
- Avoid questions unrelated to land use
- Avoid questions that are too political
- Avoid questions that require national expertise
- Find panelists with expertise that matches assignment

<b>TAPs Fees*</b>	<b>District Councils</b>
Pro Bono	25%
\$1-\$5,000	5%
\$5-10,000	25%
\$10-15,000	30%
\$15,000 plus	15%

**\*Results of November, 2010 Poll**

- Pro Bono TAPs
- Non-ULI marketing venues
- TOD Marketplace

United Cerebral Palsy  
Orange County

Urban Land Institute  
Orange County  
District Council

Young Leaders Group  
Pro Bono Technical  
Assistance Panel  
Report

Conducted: May 1, 2009

Sponsored by


UCP  
of Orange County  
*Life without limits for people with disabilities*

ULI  
Urban Land  
Institute  
Orange County

## Technical Assistance Panel (TAP) Program

**Objectives of ULI Washington's TAP Program**

ULI Washington's TAP program provides expert advice to public agencies and nonprofit organizations facing complex land use and real estate issues in the Washington metropolitan area. Drawing from its extensive, multi-disciplinary membership base, ULI Washington conducts panels to offer objective, responsible—and market-based—advice on a wide variety of land use and real estate issues ranging from site-specific projects to public policy questions. The TAP program is intentionally flexible to provide sponsoring organizations a customized approach to specific land use and real estate issues.



### Technical Assistance Panel Sample Agenda

**DAY 1**

2:00 pm Welcome and Introduction

2:15 pm Site Tour  
*Walking / bus tour of project site(s) and surrounding areas being addressed by the panel.*

4:00 pm Sponsor Briefing  
*The briefing will segment the briefing books and provide an opportunity for the panelists to ask clarifying questions. There is also the opportunity to include stakeholders and other relevant parties for presentations and roundtable discussion.*

6:00 pm Panel Debriefing Dinner  
*Panel members will have a working dinner to share information learned during the tour and sponsor briefing, discuss their initial impressions, and set the course for the following day.*

**DAY 2**

9:00 am Discussion of Panel Objectives - Breakfast

9:30 am Panel Working Session  
*Panel members go to deliberate, formulating recommendations for each of the sponsor's questions.*

12:00 pm Working Lunch

4:00 pm Wrap-up and finalization of the Power Point Presentation

4:15 pm Run through of the panel's presentation on its findings & recommendations

5:00 pm Summary of Recommendations  
*The panel meets with the sponsor and invited guests to present its findings and recommendations. After the panel makes its presentation, time is allotted for questions.*

6:15 pm Adjourn

ULI Washington  
4909 Cahoon Avenue, 21st Floor, Bethesda, Maryland 20814  
Tel: 240-497-5919 • Fax: 240-497-5818 • www.washington.uli.org

## ULI CHARLOTTE TECHNICAL ASSISTANCE PROGRAM

**Where are we going and what is the best way to get there?**  
When was the last time you asked yourself this question?

**Consider a Technical Assistance Program (TAP)**



Since 2002, ULI Charlotte has helped communities and organizations throughout the region answer this and many other questions through its Technical Assistance Program (TAP). Specifically, the program assists non-profit organizations, cities, towns and communities by bringing experts together to provide unbiased, pragmatic advice for addressing complex land use and real estate development issues.

ULI Charlotte hand selects experienced panelists from the public sector, planning, design, engineering, development and financing professions to bring many years of expertise to the table with the goal of providing innovative solutions for each unique program. Each Technical Assistance Program is tailored to meet the specific needs, objectives, and budgets of the client.

TAPs typically take place over the course of one day, when three to five expert panelists review the target site, analyze the data, and provide the client with a report of their findings and recommendations. TAP services range in cost from \$12,000 - \$15,000, depending on the scope of services. ULI Charlotte strives to deliver a comprehensive solution to each challenge posed, in a strategic and cost-effective manner.

**Examples of TAP reports include:**

- Downtown/Transit Oriented Development**  
Mill Village Revitalization Study, Mooresville, NC  
Addressing the Mill Village, which surrounds the former Mooresville Mill.
- Non-Profit**  
Charlotte Regional REALTOR® Association, Charlotte, NC  
Reviewing and providing recommendations for the real estate holdings of the Charlotte Regional REALTOR® Association.
- Neighborhood Revitalization**  
Holly Avenue Neighborhood, Winston-Salem, NC  
Implementing a foundation for future planning efforts by supplying an initial community assessment of land use strategies and offering recommendations for next steps.
- Economic Development/Corridor Redevelopment**  
Historic West End, Charlotte, NC  
Revitalizing West Trade Street from Johnson C. Smith University to Gateway Village.



Historic Assessment Program panelists work on a project

**Let ULI Charlotte show you the way.**



DP panelists' recommendations for street modifications and improvements

**Ready to learn more?**

Contact Theresa Salome in the ULI Charlotte offices at 704.940.7388 or email us at [charlot@uli.org](mailto:charlot@uli.org)



ULI Charlotte | 609 East Blvd., Ste. 210, Charlotte, NC 28202 | 704-940-7388 (toll free) | 704-940-2648 (fax) | [charlotte.uli.org](http://charlotte.uli.org)

ULI Washington:  
<http://washington.uli.org/Community%20Outreach/Technical%20Assistance%20Panels.aspx>

ULI Charlotte:  
<http://charlotte.uli.org/Community%20Outreach/Technical%20Assistance%20Panels.aspx>

“Getting TAPs is all about making contacts in the community; typically a mail-out campaign will reinforce the message, but typically isn't successful alone.”

“We've found that a successful TAP requires a willing partner/"customer" and have limited our efforts to only such situations.”

“We have invited other interested entities to attend a TAP. It gives them a better idea of what to expect and sometimes how they should formulate their situational abstract (for a TAP assignment).”

“Word of mouth from satisfied public sector clients seems to work best.”

**\*Results of November, 2010 Poll**

“Partnered with state development agency to help us source sponsors.”

“Create a TAP PowerPoint presentation that can be delivered at local government meetings or planning conferences by a committee member (example: chair has delivered TAP presentations at the annual South Carolina American Planning Association conference and municipal association meeting.)”

“Read the local news every morning to identify issues and opportunities where TAPs could be helpful.”

**\*Results of November, 2010 Poll**

# **TAPs Webinar: Best Practices for District Councils**

**Thank you!  
Carla Coleman  
Susan Davison  
Tom Eitler**

**Powerpoint available on “TAPs Resources” webpage:**

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