

SUMMARY OF THE URBAN LAND INSTITUTE'S ADVISORY SERVICES PROGRAM

ABOUT ULI

ULI—the Urban Land Institute is a 501(c) (3) nonprofit research and education organization supported by its members. Founded in 1936, the institute now has more than 34,000 members worldwide representing the entire spectrum of land use, urban planning and real estate development disciplines, working in private enterprise and public service. As the preeminent, multidisciplinary real estate forum, ULI facilitates the open exchange of ideas, information and experience among local, national and international industry leaders and policy makers dedicated to creating better places.

The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.

Members say that ULI is a trusted idea place where leaders come to grow professionally and personally through sharing, mentoring, and problem solving. With pride, ULI members commit to the best in land use policy and practice.

ABOUT ULI ADVISORY SERVICES

The goal of ULI's Advisory Services Program is to bring the finest expertise in the real estate and design professions to bear on complex land use planning and development projects, programs, and policies. Since 1947, this program has assembled well over 400 ULI-member teams to help sponsors find creative, practical solutions for such issues as downtown redevelopment, evaluation of development potential, growth management strategies, community revitalization, urban design, brownfields redevelopment, military base reuse, workforce and affordable housing, and asset management strategies. ULI Panels are also known for providing concrete actions steps that allow their pragmatic solutions to be implemented.

A wide variety of public, private, and nonprofit organizations have contracted for ULI's Advisory Services. Each panel team is composed of highly qualified professionals who volunteer their time to ULI. They are chosen for their knowledge of the topic of the panel and screened to ensure their objectivity. ULI panel teams are interdisciplinary and are developed based on the specific scope of the assignment. Panelists are likely to include economists, developers, market analysts, finance experts, urban planners, architects, realtors, engineers and public officials. ULI teams provide a holistic look at development problems. Each panel is chaired by a respected ULI member who has previous panel experience. The agenda for a panel assignment is rigorous. It includes an in-depth briefing composed of a tour of the site and meetings with sponsor representatives, interviews of key people within the community, and time for formulating recommendations. On the final day on site, the panel makes a slide presentation of its findings and conclusions to the sponsor. Copies of the slide presentation are provided to the sponsor at the meeting and can serve as a summary of the panel's recommendations until the final written report is prepared and published in the weeks following a panel.

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Advisory Services Panel Options Summary

Just as there are a variety of land use issues, ULI has a variety of programs to meet your needs.

All have the following characteristics in common:

- A scope defined by you, the sponsor, to ensure that your needs are met;
- An objective team of seasoned professionals who have addressed similar issues in other places;
- Recommendations that build on previous studies, initiatives and plans; and,
- The high-quality outcome for which ULI is known.

Project Analysis Session

A two-hour “over-the-shoulder” look at your project at our ULI Spring and Fall Meetings. A team of four or five ULI members spend time with you reviewing your project and providing feedback on specific issues related to your plans. The PAS sessions can act as analysis session to “frame” questions for the more elaborate three or five day panels. Space is limited, so sponsors are encouraged to contact the Advisory Services staff well in advance of the meeting.

Cost: \$3,500

Deliverable: *Audio Tape*

One and One-half Day / Fellows Advisory Panel

A day and a half with one or two panelists or one of ULI’s Senior Resident Fellow brainstorming about specific issues related to a development project, or land use policy. ULI’s Senior Resident Fellows are distinguished experts providing leadership in land use policy and practice in the areas of finance, retail, transportation, housing, urban development, and urban policy.

Cost: \$25,000

Deliverable: *Summary Panel Report in B&W*

Three-Day Panel

A three and one half day session with four to five ULI members who will provide you with recommendations as you begin to form strategies for addressing difficult land use issues. This “SWAT Team” approach will help you focus in on the critical decisions that need to be made and formulate some key action items for you to implement.

Cost: \$60,000

Deliverable: *Summary Panel Report, Color Cover, B&W inside*

Five-day Panel

The flagship of ULI's Advisory Services Program, a five-day panel involves a diverse team of eight or nine members who work together to investigate the market potential, develop planning and design strategies, recommend phasing options, and outline implementation steps for you.

Cost: \$115,000

Deliverable: *Summary Panel Report, Color Cover, Color Inside*

Specialized Services

ULI will work with all potential sponsors to define a program to meet its needs. We recognize that each sponsor is unique with a set of issues that are very important to the specific community. ULI staff will work with you to define a process that will meet your needs and provide you with the momentum for moving forward. Specialized services include approaches as varied as two hours with ULI staff at its headquarters, extended sessions with research directors or senior resident fellows or a two day overnight visit by ULI staff or an extended visit to a specific site. It may also include a more elaborate series of panels over a period of months.

Cost: Varies

Deliverable: Varies

District Council Technical Assistance Programs (TAPs)

Conducted by local ULI members, TAPs are short sessions (usually one day) in which a local government or non-profit organization asks the District Council to provide advice on a specific land use issue. Panelists are usually members of the local ULI District Council. Information for TAPS is available on the individual websites for our District Councils.

Cost: Varies by District Council

Deliverable: Varies by District Council

Preparation for the Panel's Work

Briefing Book

The sponsor prepares a briefing book and mails it directly to each panel member and two copies to ULI's Advisory Services staff approximately two weeks before the panel's arrival on site. Guidelines for the briefing book will be provided by ULI.

List of Local Resource People

The sponsor prepares a list of resource people to meet with the panel. The number of people the panel talks to depends on the assignment and the panel format. The list may include members of the private sector, community leaders, political leaders, local residents, key officials of public agencies, and any other individuals who might provide information and insight to the panel. The

list of resource people and their affiliation should be included in the Briefing Book. ULI staff works with panel sponsors to compile this list.

Schedule Discussion with Resource People

The sponsor schedules the panel's meetings with local resource people. The sessions are designed for the panel to learn about local issues. ULI will work with the sponsor to determine the appropriate format for discussions with the resource people.

First Day Briefing

On the first full day of the assignment, sponsor representatives brief the panel on the study area and the specific details of the assignment. This briefing should include a history of the study area, an overview of the issues, and a discussion of expectations.

Study Area Tour

The tour should be carefully planned and narrated. Sponsor staff and additional resource people (if necessary) should accompany the tour to answer questions from the panel. The sponsor arranges for the appropriate transportation making sure that there is adequate seating for the panel, ULI staff, and any local guides. A hand-held map of the study area should be provided for each panelist.

Resource Materials

Any additional resource materials not included in the briefing book should be taken to the panel's hotel and made available throughout the week for all the panel members. These should include relevant plans, regulations, and ordinances; market data; previous studies; and any other documentation that the panel may need for reference, but which did not warrant inclusion in the briefing book. Panel members may request additional materials during the week. These materials will be returned to the sponsor.

Maps

Site plans and base maps at various scales as well as aerial photos should be provided if available. Four copies of the most basic base maps of the study area should be provided for reference during the interviews. Additional copies should be available for the planners and architects who will be preparing the drawings and plans for the final presentation. A hand-held map of the study area should be provided to each panelist for the tour.

Logistics

Hotel References

The sponsor may be asked to provide ULI staff with the names of two or three local business class hotels. ULI will contact the hotels directly to arrange for the panel's on-site needs.

Transportation

The sponsor arranges transportation for the panel members and ULI staff for the 1st day tour. For special cases, the sponsor may be asked to provide transportation at other times during the panel's visit. This will be discussed with the sponsor ahead of time.

First Night Dinner

The sponsor makes arrangements for dinner on the first night for the sponsor and the panel. The dinner provides an opportunity for panel members to speak informally with sponsor representatives and learn about the local climate and the sponsor's objectives for the week. ULI will absorb the dinner cost of the panelists and ULI staff.

Monday Reception

During a 5-day assignment the sponsor is encouraged to host an hour-and-a-half reception on Monday evening for the panel and those individuals to be interviewed. The reception allows the interviewees to meet the panel in an informal setting before the interviews occur on Tuesday and

learn more about the panel's assignment and agenda. A sponsor representative and the panel chair usually provide brief remarks.

Panel Presentation

The sponsor secures a location for the final presentation. If it is a public presentation, the room should have a stage or podium from which the panel can address the audience and should have audio/video capabilities. Generally, if the presentation is public, about 100 people can be expected. The hotel ballroom, city council chambers, or a local venue such as a library, church or club auditorium can be used. If the presentation is to be a closed meeting, a conference room in the hotel or at the sponsor's office may be used.

Coordinate with ULI Staff

Early in the process, a lead contact for the sponsor should be identified. Prior to the panel's visit, ULI will coordinate a conference call to finalize the logistics.