

**Technical Assistance Panel**

**OVERVIEW**

**Objective**
ULI’s Technical Assistance Panel (TAP) Program is designed to provide objective, expert advice to municipal and community-based organizations on the feasibility, design, or implementation of development initiatives. This program is specifically intended for non-profit organizations and municipalities that have limited staff or financial resources or that operate in economically disadvantaged areas.

**Program Description**

ULI Kansas City’s TAP program brings expertise in real estate, design, and finance to bear on local land use planning and development projects. Once a project has been designated as a TAP, ULI Kansas City will assemble an interdisciplinary team of senior professionals for a one or two day-long brainstorming session. The TAP program concentrates a team of local experts in a comprehensive look at all angles of the development process to formulate realistic options to move a project forward.

A typical TAP begins with a briefing book meeting where the sponsor reviews the project and orients the panel to the briefing materials. A week or two later, the panel gathers for the one or two day-long TAP which begins with a project/site tour, followed by stakeholder interviews. The panel then goes into a closed-door charrette, and later concludes with a public presentation of their findings and recommendations. A written report of the TAP is produced and delivered within six weeks.

The sponsoring organization/municipality is responsible for gathering and presenting background information needed to fully understand the project. The sponsor also provides staff support for the one or two day-long meeting and for any follow-up report or presentation. ULI members will volunteer their time to develop an understanding of the problem, compile recommendations, and debrief the sponsors on conclusions and recommendations.

Sponsors also must commit to a one-year follow-up meeting with ULI.

**ULI Core Competencies**

Members of ULI Kansas City can provide expertise and advice in the following areas:

* Land use design and planning
* Market feasibility analysis
* Financial analysis and structuring
* Structuring private/public partnerships
* Adaptive reuse of buildings, development process, permitting and community relations

**Technical Assistance Panel**

**SPONSOR OBLIGATIONS**

**Panel Preparation**

* **Briefing Materials**. The sponsor is responsible for gathering and assembling all relevant background information related to the issues being addressed. The sponsor will compile background information, along with any other relevant information, into bound briefing books (a three-ring binder is acceptable) which will be distributed to each panelist at a pre-TAP meeting where the sponsor will explain the project and review the briefing materials. Briefing materials should be ready for delivery to the panel chair, panelists and ULI Kansas City staff at least two weeks before the scheduled panel. The ULI-assigned project manager will determine what is needed for the Panel’s review and will assist the sponsor in reviewing materials and identifying additional materials and information needed for the Panel.
* **List of Resource Individuals**. The sponsor must prepare a list of resource individuals available on the day of the TAP. The list should be restricted to no more than 5 people and should include key members of the private and public sectors that can provide valuable insight and information to the Panel.
* **Interview Schedules**. The sponsor is responsible for scheduling and gathering key stakeholders for the morning session and, if necessary, during the one-hour follow-up afternoon session.
* **Project/Site Tour**. If the issues deal with a specific project or project area, the sponsor is responsible for arranging a tour of the project/site and surrounding area if applicable. The sponsor must arrange for transportation and an accompanying staff person to answer panel members’ questions.
* **Other Resource Materials**. Additional resource material that is not appropriate or too bulky for inclusion in the panel briefing books should be made available at the panel meeting place. Such information might include zoning and general plan materials, market data, economic studies and projections, maps and other similar materials as needed. The ULI project manager and the sponsor will determine prior to the panel session what materials might be helpful to the panel deliberations.

**Logistics**

* **Panel Meeting Room(s)**. The sponsor is responsible for providing a conference room for the panel meeting, group interviews and the panel presentation. The presentation room should be set up in a manner consistent with the type of final presentation desired and the amount of audience participation desired.
* **Transportation**. It is helpful, but not essential, that transportation for group activities such as the project/site tour and surrounding area be provided in one vehicle so that panel members may converse and collaborate. In order to reduce the time required for local transportation, it is recommended that as many interviews as possible be conducted at the main location where the panel is meeting.
* **Meals**. The sponsor is asked to provide a light breakfast with coffee for the morning session, lunch for each panelist and a light dinner if the presentation is scheduled to begin after 5:30 pm.

**Technical Assistance Panel**

**SAMPLE PANEL SCHEDULE**

This schedule represents the general format and timing of the one day Panel process. The schedule is subject to change, depending on the issues involved in the assignment.

8:00 a.m. Panel meeting – introductions, initial discussion of key issues and additional information needs, review of schedule and panel member assignments.

8:30 a.m. Site visit and/or start of interview process with key resource people, on an as-needed basis. Site visit should last no longer that 1½ hours to allow adequate time for interviews.

12:00 p.m. Working lunch – report first overview of findings based on morning sessions; identify information gaps/conflicts that need to be resolved.

1:00 p.m. Follow-up interviews if necessary.

2:00 p.m. Develop consensus on major conclusions; identify key themes that address major issues; identify areas where the sponsor should do follow-up work to further assess panel’s conclusions.

3:00 p.m. Organize draft outline of key summary and conclusions; draft detailed outline covering key points and issues; and convert to flip chart/report handout for presentation. Organize presentation and panelist involvement.

5:00 p.m. Presentation and discussion of panel conclusions and recommendations.

**Technical Assistance Panel**

**APPLICATION FORM**

Please provide the following information and submit to ULI Kansas City.

Applicant Organization\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_\_\_\_\_\_ Zip\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-Mail\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please attach the following:

**1. Statement of the problem/issue**

Provide a brief description of the major problems or issues that you wish the Panel to address. Include a brief history and current status of the project/study area/issue.

**2. Sponsor information**

Please describe:

(1) The type of and major business activity of the sponsoring organization;

(2) What role the sponsor plays in the particular issue(s) suggested for the Panel; and

(3) Include a brief history of important projects/activities that recently have taken place or are planned or under consideration.

**3. Questions to be addressed by the Panel**

List **three** essential questions/issues to be evaluated by the Panel. Be as specific as possible. Please organize questions/issues by major topic, such as market issues; planning and design issues; feasibility and financing issues; management and implementation issues; and so on.

**4. Sponsor responsibilities – planning and logistics**

Please identify the individuals who will be responsible for working with ULI Kansas City staff to prepare for the TAP. Sponsor responsibilities include providing background and briefing documents; organizing and scheduling interviews; conducting a project/site tour; transportation for site tour, food during the TAP, providing physical facilities for panel work sessions and presentation; and providing general logistical support. Also identify the key people whom you believe can contribute to the panel’s understanding of issues. Please provide name, organization and title, and contact information for all individuals listed.

**5. Fees**

ULI Kansas City charges a fee of $5,000-$8,000 per day. Depending on the topic, the TAP would be one or two days. These fees will be fully explained and agreed upon as part of the TAP agreement.