



Best Practices for Technical Assistance Panels (TAP)

ULI BOSTON/NEW ENGLAND BEST PRACTICES FOR TECHNICAL ASSISTANCE PANELS

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Preliminary Community Meeting

TAP Team

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Planning

Preliminary Site Visit

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Issuing TAP Report

Follow-Up

Examples

Salem MA TAP Report

Cleveland Circle PowerPoint Presentation

Links to ULI Boston/New England and ULI National Advisory Services web sites, examples, information and forms

APPLICATION Review

Primary Person: ULI Community Outreach Committee

Description: Evaluate the feasibility of the project using the provided application evaluation form.

Resources Needed: Community's application and ULI evaluation form

REQUEST FOR APPLICATIONS ULI Boston/New England – Technical Assistance Panel

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 pro bono program is specifically intended for organizations/municipalities that have limited staff or financial resources or that operate in economically disadvantaged areas. Previous projects have ranged in scope from generating ideas for redeveloping individual sites to creating strategies for revitalizing entire downtown districts.

Program Description

ULI Boston/New England'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 Boston will assemble an interdisciplinary team of senior local professionals for a day-long brainstorming session. The one day TAP program developed out of ULI's fee-based national Advisory Services Program, which concentrates a team of national experts in a comprehensive look at all angles of the development process to formulate realistic options to move a project forward. The TAP program is a way for organizations with more limited resources to focus local ULI members' expertise on a specific problem at a nominal cost.

The sponsoring organization/municipality will be responsible for gathering and presenting the background needed to understand the project. The sponsor also will provide staff support for the meeting and for any follow-up report or presentation. ULI members will volunteer up to a day of their time developing an understanding of the problem, compiling recommendations, and debriefing the sponsors.

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

ULI Core Competencies

Members of ULI Boston 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 assembling all relevant background information relating to the issues being addressed. This material should be ready for delivery to the panel chair, each panel member and ULI Boston 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 who might provide valuable insight and information to the panel.
- **Interview Schedules.** The sponsor is responsible for gathering these key stakeholders together for the morning session and, if necessary, during the one-hour follow-up afternoon session.
- **Project/Area Tour.** If the issues deal with a specific project or project area, the sponsor is responsible for arranging a tour of the project or project area. The sponsor must arrange for transportation and an accompanying staff person to answer panel 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.** As previously indicated, it is helpful but not critical that transportation for group activities, such as the site or area tour, are provided in one vehicle. 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.

Technical Assistance Panel APPLICATION FORM

Please provide the following information and submit to ULI Boston

Applicant Organization _____ Date _____

Contact Person _____

Title _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____ 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 3 major questions/issues to be evaluated by the Panel. Be as specific as possible. Please organize questions/issues by major topic, such as (1) market issues; (2) planning and design issues; (3) feasibility and financing issues; (4) 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 Boston to prepare background and briefing documents; organizing and scheduling interviews; conducting a project/area tour; providing physical facilities for panel work sessions and presentation; and providing general logistical support. Also identify to extent known the key people whom you believe can contribute to the panel's understanding of issues. Please provide name, organization and title, telephone and fax numbers for all individuals listed.

5. Fee arrangement

The TAP fee is \$5,000 with an additional writer's fee of \$1,500. The sponsor is also expected to cover all the expenses associated with the panel, including preparation of briefing materials, copying, logistics, lunch, transportation to and from the meeting site, and any other expenses.

6. General Panel Schedule

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

CRITERIA TO BE CONSIDERED IN EVALUATING WHETHER TO UNDERTAKE A PROPOSED TECHNICAL ADVISORY SERVICES PANEL

Each proposed Technical Advisory Services Panel should be closely evaluated to ensure consistency and harmony with ULI's goals and policies. No one criteria listed below would dictate a particular decision, and other criteria may be useful or helpful. The basic criteria are as follows:

1. Organization Requesting the Panel (public, non-profit, private).
2. The Purpose of the Organization.
3. The Reasons for the Panel.
4. The Expected Product to be provided.
5. Whether the Issue or Project is Controversial and the Nature of the Controversy.
6. Whether the Issue or Project has Sufficient Challenges and Issues to Interest ULI Members to Participate.
7. Whether the Request for the Panel is merely to validate Another's Conclusions and Analysis.
8. Whether Sufficient Information Has Been Collected to Have a Meaningful Panel.
9. The Use of the Product Produced by the Panel.
10. The Timing for the Panel from the Standpoint of the Requesting Organization and the Resources of ULI.
11. Whether the Project or Issue is Too Big or Complicated to fit into a Local Panel.
12. Whether the Project or Issue would be Better Served by a National ULI Panel.
13. Whether Local ULI Talent Exists.
14. The Location of the Issue or Project.
15. The Ability of the Organization to Cover Expenses and/or Pay a Fee.

TYPE OF PANELS/BUDGET

Primary Person: ULI Community Outreach Committee, ULI Staff

Description: Determine the total cost/reimbursements that the Applicant will incur in accepting the Technical Assistance Panel and determine the type of panel ex. one day, two or three continuous days, multiple split days or one week national panel. See previous included guidelines for selecting a type of panel and sample budget form below.

Resources Needed: Community's application, Budget Sheet

Sample Budget

BUDGET FOR [PROJECT NAME]

	Number	Amount (\$)	Notes
TAP Fee		\$5000	
Writer		\$1500	
Production			
Participant Expenses:			
▪ Mileage			
▪ Tolls			
▪ Parking			
▪ Lunch			
▪ Miscellaneous/Other			
TOTAL			

LETTER OF ACCEPTANCE / INFORMATION REQUEST

Primary Person: ULI Community Outreach Committee, ULI Staff

Description: Confirm that ULI will undertake the project, report the total budgeted cost, and schedule a preliminary meeting and site visit with sponsor. Also request a comprehensive list of documents needed for ULI to become familiar with the city (see sample).

Resources Needed: Acceptance Letter, Budget Sheet, Detailed information request list

Sample Acceptance Letter

ULI Boston/New England
400 Atlantic Avenue
Boston, MA 02110

City Representative
[Address]
[City, State, Zip]

[Date]

Dear [City Representative]:

The Urban Land Institute Boston District Council has reviewed your application for your city's project and would be pleased to offer you the services of a [insert duration/type of panel] Technical Assistance Panel I on (enter date(s)). The Technical Assistance Panel (TAP) will consist of industry experts who will, after an initial site visit, convene to determine recommendations for your city and present their findings in a TAP report.

The total cost of the TAP process will be \$[insert amount], which can be payable to the ULI Boston District Council upon delivery of the TAP Report. We look forward to starting the process with you as soon as possible, and would much appreciate your sending us a copy of this letter with your signature, acknowledging the costs and as authorization to proceed at your earliest convenience, and the information that is listed on the attached request list by (date) Furthermore, please contact us at [insert phone number] so that we can schedule a preliminary meeting to discuss the project's objectives with you.

Sincerely,

[Signature]

Urban Land Institute Boston District Council

AUTHORIZATION:

Name

Signature

Date

Title

Sample Information Request List

General Information:

- 1) City information/statistics
 - a. Maps, site plans, photographs
 - b. Demographic information – see *suggested list of resources on page 22*
 - c. Economic statistical report for current, historical, and future years
 - d. Labor information including unemployment and employment breakdown
 - e. Community brochures
 - f. Directory of office buildings
 - g. Directory of industries
 - h. Directory of hotels and restaurants
 - i. Convention statistics
 - j. List of major employers
 - k. Crime rate statistics
 - l. Visitor/tourism statistics
 - m. School ratings
 - n. Financial Information (i.e. the city's financial situation and sources of funding)
- 2) Issues of local concern
- 3) Identification of problem areas
- 4) Description of current initiatives
- 5) City Council contact information
- 6) Other information

Request other information based upon the land use type.

Residential:

- 1) Median household income
- 2) Median property value
- 3) Property tax rates
- 4) Housing mix (apartments vs. houses)
- 5) Profile of residents
- 6) Utility services
- 7) History and reputation of selected neighborhoods

Commercial/Retail:

- 1) List of current businesses/office buildings in the city
- 2) Retail sales by volume
- 3) Square footage of leased space
- 4) Description of any businesses that there may be a need for
- 5) Identification of empty retail space

Hotel:

- 1) Existing supply/proposed supply
- 2) Opinions on hotels in the market and need for additional accommodations

Municipal:

- 1) Location of parking lots/garages (are they busy? revenue-generator for the town?)
- 2) Location of schools and school ratings
- 3) Location of police and fire departments
- 4) Location of hospitals
- 5) Airport/highway/rail access

Parks/Recreational:

- 1) Visitor profile of park users
- 2) Uses of the park
- 3) Seasonal hours/activities and entry fee (if applicable)
- 4) Dimensions and location of the area

Site Under Consideration:

- 1) Zoning regulations/policy
- 2) Property taxes
- 3) Description of the surrounding area
- 4) Public opinion (news articles, meeting minutes)
- 5) Environmental concerns
- 6) Copies of city development or renewal plans and recent studies

Preliminary Sponsor Meeting and Site Visit

<i>Primary Person:</i>	TAP Panel Chair(s), Preselected TAP panel members, TAP Sponsor(s)
<i>Description:</i>	Confirm details of the project and refine the assignment objectives. Review Sponsor obligations. Confirm type of TAP conference and corresponding cost, meeting logistics. Conduct preliminary site visit.
<i>Resources Needed:</i>	Community's application, Information Request List

Preliminary SITE VISIT

- Primary Person:* Selected members of TAP (Reconnaissance Team), TAP Chair(s)
- Description:* Evaluate first-hand the current situation of the city. See attached list of sample questions to ask during the tour.
- Resources Needed:* Application, Results of Preliminary Community Meeting, Information Request List from the city, Site Visit Questions

Sample Site Visit Questions

- What are the major issues of local concern?
- What are the traffic-flow patterns? Where does traffic come into the city? How does commuter traffic move around the city? To what cities does each major artery lead? Is there congestion?
- Where are the residential neighborhoods, parks?
- Where are the clusters of industrial development?
- Where are the clusters of office development?
- Where are the shopping malls and major installations – universities, military bases, airports, etc.?
- Where are the town buildings located – police and fire departments, city hall, schools, libraries, parks, community centers?
- In which directions is the city growing (both commercial and residential development)?
- Where are the “best” and “worst” neighborhoods?
- What is the “reputation” of the city from the community’s standpoint?
- Is there public transportation available, where and what type
- Is there waterfront, major uses

ASSEMBLE TAP TEAM

- Primary Person:* ULI Real Estate Advisory Committee Chair(s), TAP Panel Chair(s) and ULI Executive Director
- Description:* Select members with needed areas of expertise that match the TAP Applicants' needs and select at least one or two individuals that have participated in a TAP before. In addition, identify an alternate list to ensure a sufficient panel, should someone not be able to participate. For those critical experts, consider at least two individuals. The total number should in most cases be between 8 and 10 panel members. Send an invitation letter and follow-up. Once they accept, provide the Applicant with biographical summaries and roster of each member. See sample letter, biography, and TAP roster.
- Resources Needed:* Application, Results of Preliminary Community meeting, ULI Contact List of Members

Sample Letter to Potential Panel Member

ULI Boston
400 Atlantic Avenue
Boston MA 02110

[TAP Member's Name]

[Address]

[City, State, Zip]

[Date]

Dear Mr./Mrs. [Last name]:

The Urban Land Institute would like to invite you to participate on a Technical Assistance Panel for a [insert type of project] in [city, state]. The Panel will convene on [insert conference dates] to discuss the current state and recommend solutions for this Applicant. [Insert any details with regard to site visits, etc here].

Panelists understand they are being asked to provide objective advice to the sponsor based on their expertise, experience and/or professional background. Therefore, each panelist must determine, in advance of accepting an assignment, whether an actual conflict exists or whether one might be created by the panelist accepting an assignment. Obvious conflicts include panelists currently under contract or being considered for a contract with a competing public agency or private developer/investor on a directly competing development or issue in a competitive location.

Panelists agree not to directly market their services to the sponsor for a period of six months following completion of the panel assignment. ULI does not intend to preclude sponsors from utilizing the services of ULI members on future work for the sponsor. However, if a sponsor should approach a panelist regarding future work for the sponsor after a panel assignment is completed, ULI requests that the panelist notify the Public Outreach Vice-chair of the ULI Boston District Council to verify that the panelist's potential involvement with the sponsor in no way impacts the integrity of the Technical Advisory Program.

We would so appreciate your sharing your expertise in [insert field of work] with regard to this project. Please contact [insert name] at the Urban Land Institute's [insert city] District Council at [insert phone number] and email a copy of your biography if you would be able to donate your time to this cause. A full timeline and project briefing binder will be mailed to you as soon as possible upon acceptance of your position.

Sincerely,

[Signature]

Sample Panel Member Biography

Fern I. Kanter **Executive Vice President**

Ms. Kanter possesses 25 years experience supporting her current role as Executive Vice President at CHM. As a member of CHM's Executive Committee Team, she plays an active role in client relations and is involved in the development of the company's business plan and execution of corporate growth strategies. Ms. Kanter's primary focus is developing strategies to achieve ownership investment objectives for each of the hotels in the CHM portfolio. At the onset of a new client engagement, Ms. Kanter coordinates the efforts of transition planning and take-over, develops the strategic vision for the asset and develops initiatives in support of achieving planned objectives. As part of these strategies, Ms. Kanter is responsible for identifying opportunities for operational enhancement, as well as analyzing and executing on opportunities for re/development. Ms. Kanter has extensive resort master-planning and development experience, including assembling and actively leading teams through the entitlements process and has been involved in planning projects estimated to increase land value by more than \$80 million. Ms. Kanter manages the due diligence team responsible for investment analyses supporting clients in the acquisition and disposition of assets, and is responsible for the day-to-day oversight and coordination of CHM team activities and professional staff development.

Sample TAP Roster

Technical Assistance Panel Members

[Name of TAP]

[TAP Dates]

<i>Name</i>	<i>Area of Expertise</i>	<i>Company/Affiliation</i>	<i>Phone Number</i>	<i>Email</i>
John Smith	Urban/Regional Planning	Smith & Company	978-222-5555	jsmith@smithco.com

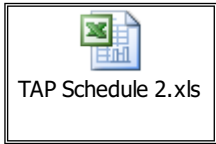
TIMELINE / Schedule Management

Primary Person: ULI Real Estate Advisory, TAP Panel Chair(s), ULI Staff

Description: Prepare a timeline for all TAP members. Schedule Status report for Outreach Committee on a monthly basis with actual dates inserted in worksheet. Committee with TAP chair shall evaluate and provide additional resources as required to meet agreed to dates. See Excel Schedule Workbook for schedule template below.

Resources Needed: Application, Results of Preliminary Community Meeting, Finalized list of TAP team members, Information Request List from the city, Excel Schedule Workbook

Task Name	Duration	Start	Actual Start	Finish	Actual Finish	Resource
Review Applications	2	4/1/2010		4/2/2010		OR Comm
Determine Budget	1	4/5/2010		4/5/2010		ULI Staff
Letter of Acceptance - Request for Information	1	4/6/2010		4/6/2010		ULI Staff
Preliminary Sponsor Meeting& Site Visit	1	4/21/2010		4/21/2010		Tap Chair, Sponsor
Select TAP Team	10	4/22/2010		5/5/2010		Tap Chair, ULI Staff
Secure Sponsor Data	20	4/9/2010		5/6/2010		Sponsor
Create Timeline	1	5/7/2010		5/7/2010		ULI Staff
Secure Additional Data	10	4/26/2010		5/7/2010		ULI Staff
Issue Briefing Binders & Agenda	5	5/10/2010		5/14/2010		ULI Staff
Hold TAP Meeting	1	5/31/2010		5/31/2010		Tap Panel
Write Report	10	6/1/2010		6/14/2010		Report Writer
Internal Report Review	5	6/15/2010		6/21/2010		Tap Panel, OR Comm
Finalize Report	5	6/22/2010		6/28/2010		Report Writer
Distribute Report	1	6/29/2010		6/29/2010		ULI Staff
Invoice Applicant	1	6/30/2010		6/30/2010		ULI Staff
Create and Distribute PR Article	15	7/1/2010		7/21/2010		ULI Marketing Staff
Follow Up with Sponsor	10	4/6/2011		4/19/2011		Tap Chair



Double Click on Symbol to activate TAP Excel Schedule Workbook

TAP Typical Schedule

ID	Task Name	Start	Finish	Duration	Timeline			
					Apr 2010	May 2010	Jun 2010	Jul 2010
1	Review Applications	4/1/2010	4/2/2010	2d	█			
2	Determine Budget	4/5/2010	4/5/2010	1d	█			
3	Letter of Acceptance - Request for Information	4/6/2010	4/6/2010	1d	█			
4	Preliminary Sponsor Meeting & Site Visit	4/21/2010	4/21/2010	1d		█		
5	Select TAP Team	4/22/2010	5/5/2010	2w		█		
6	Secure Sponsor Data	4/9/2010	5/6/2010	4w	█	█		
7	Create Timeline	5/7/2010	5/7/2010	1d		█		
8	Secure Additional Data	4/26/2010	5/7/2010	2w		█		
9	Issue Briefing Binders & Agenda	5/10/2010	5/14/2010	1w			█	
10	Hold TAP Meeting	5/31/2010	5/31/2010	1d				█
11	Write Report	6/1/2010	6/14/2010	2w			█	
12	Internal Report Review	6/15/2010	6/21/2010	1w				█
13	Finalize Report	6/22/2010	6/28/2010	1w				█
14	Distribute Report	6/29/2010	6/29/2010	1d				█
15	Invoice Applicant	6/30/2010	6/30/2010	1d				█
16	Create and Distribute PR Article	7/1/2010	7/21/2010	3w				█

ADDITIONAL SUPPORTING RESEARCH

Primary Person: ULI TAP Chair(s) and Staff

Description: Research/follow-up on findings from the site visit as well as compile any resources that will aid in the TAP conference. See attached list of suggested sources.

Resources Needed: Site evaluation forms, Information Request List from the city

Sources of Primary/Secondary Research

Interviews with community members and town officials

Office of the City Council and Planning Board

Local Treasurer's Office

The City's Website

United States Census Bureau – <http://www.census.gov/>

United States Department of Commerce – <http://www.commerce.gov/>

United States Department of Commerce, Bureau of Economic Analysis – <http://www.bea.gov/>

United States Department of Labor, Bureau of Labor Statistics – <http://www.bls.gov/>

United States Department of Transportation – <http://www.dot.gov/>

United States Department of Justice – <http://www.usdoj.gov/>

United States Department of Agriculture – <http://www.usda.gov/wps/portal/usdahome>

United States Department of Health and Human Services – <http://www.hhs.gov/>

National Association of Realtors – <http://www.realtor.org/>

Small Business Association – <http://www.sba.gov/services/index.html>

BRIEFING BINDER

- Primary Person:* City Representatives, ULI Staff, TAP Chair(s)
- Description:* Prepare a binder of compiled information from the city and additional research thus far and distribute to all TAP members so that they are fully informed at least three weeks prior to beginning the TAP. Chair should email each member to remind them to review the package two weeks prior and ask any questions or request any additional information no later than one week before the TAP to give the Chair ample time to request and secure the data in time. See outline to follow.
- Resources Needed:* Site evaluation forms, Information Request List from the community, Timeline, TAP member contact list, any and all research collected, TAP Agenda

TAP CONFERENCE AGENDA

Primary Person: TAP Chair(s), ULI Staff

Description: Prepare a written schedule for the conference detailing discussion points and deliverables. See sample program agenda.

Resources Needed: N/A

GENERAL SCHEDULE – 1 Day -Local Technical Assistance Panel

- 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 than one-and-one-half hours to allow time for interviews.

- 12:00 a.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.

- 4:00 to 5:00 p.m. Presentation and discussion of panel conclusions and recommendations.

Sample Briefing Binder Outline

- 1) Administrative Information
 - a. Project Timeline
 - b. TAP Member Contact List
 - c. Meeting Agenda
- 2) General City Information
 - a. Copy of community's original application
 - b. Maps, site plans, photographs
 - c. Demographic information
 - d. Economic statistical reports
 - e. Labor information
 - f. Community brochures and directories
 - g. Financial information
 - h. City Council contact information
- 3) Information Specific to Land Type
 - a. Residential
 - b. Commercial/Retail
 - c. Hotel/Restaurant
 - d. Municipal
 - e. Parks/Recreations
 - f. Agricultural/Conservation Land
 - g. Other, if needed
- 4) List of stakeholders who will be interviewed during TAP. (Include name, title and company or affiliation.)
- 5) Issues of Local Concern
- 6) Past studies, drawings analysis
- 7) Associated/related zoning and policy issues
- 8) Any available financing mechanisms or vehicles
- 9) Public opinion (newspaper articles, meeting minutes)
- 10) Problem Areas/Current Initiatives
- 11) Copies of Site Evaluation Forms
- 12) Miscellaneous Supporting Research
- 13) Sample TAP Report Outline

14) Sample Power Point Outline

TAP Meeting

<i>Primary Person:</i>	TAP Chair(s), All TAP members
<i>Description:</i>	During the TAP, panel should: <ol style="list-style-type: none">1) Review the project's goals2) Conduct Site Visit3) Conduct Sponsor and Stakeholder interviews4) Analyze findings from site visit5) Summarize situation and alternatives6) Discuss alternatives and recommendations for the Sponsor7) Discuss funding opportunities8) Develop priorities and next steps9) Prepare PowerPoint presentation for Applicant10) Present to Public and Stakeholders
<i>Resources Needed:</i>	Agenda, Briefing Binders, all information collected, camera and template for PowerPoint presentation

Sample Site Evaluation Form

Project Name: _____ Date: _____

(Complete for each site visited)

Site Visited: _____

Location: _____

Surrounding Area: _____

Observations: _____

REVIEW INFORMATION REQUEST

Complete SWOT as it pertains to the TAP area:

Strengths	Weaknesses
Opportunities	Threats

Sample Site Visit Questions

- What are the major issues of local concern?
- What are the traffic-flow patterns? Where does traffic come into the city? How does commuter traffic move around the city? To what cities does each major artery lead? Is there congestion?
- Where are the residential neighborhoods, parks?
- Where are the clusters of industrial development?
- Where are the clusters of office development?
- Where are the shopping malls and major installations – universities, military bases, airports, etc.?
- Where are the town buildings located – police and fire departments, city hall, schools, libraries, parks, community centers?
- In which directions is the city growing (both commercial and residential development)?
- Where are the “best” and “worst” neighborhoods?
- What is the “reputation” of the city from the community’s standpoint?
- Is there public transportation available, where and what type
- Is there waterfront, major uses

Urban Land Institute

PowerPoint Presentation

Suggested Content

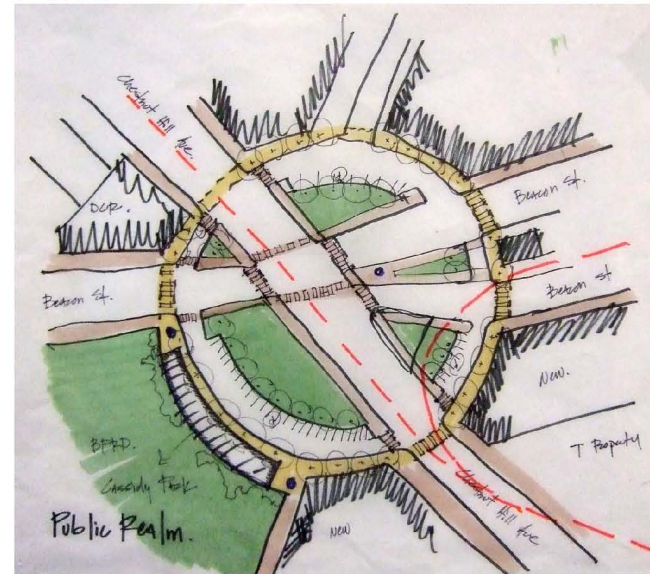
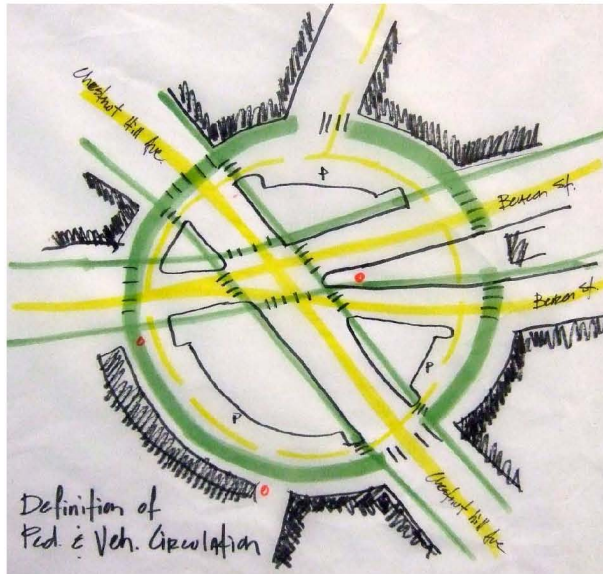
1. Cover Page
2. Presentation Outline
3. ULI
4. ULI Boston/New England
5. TAP Program and Panelist
6. Site Introduction
7. Stakeholder Input
8. Site Context and Analysis
9. Major Site/Study Area Components
 - a. Transportation
 - b. Demographics, Market Demand
 - c. Public Infrastructure/buildings/Institutions
10. Goals
11. Options & Analysis
12. Conclusions
13. Recommendations
 - a. Next Steps
14. Public Q&A

CLEVELAND CIRCLE TAP



ULI
ULI Boston
Technical Assistance Panel (TAP) Program
TAP Panelists
Introduction of Site
Stakeholder Input
Site and Context Analysis – Existing T Operations, Historic Context, Traffic, etc
Design Guidelines and Goals
T Site Redevelopment Options
Conclusions
Recommendations
Q & A

Re-establish Cleveland Circle Identity
Definition of Vehicular and Pedestrian circulation





Recommendations

Convene jointly-sponsored master planning process with Boston, MBTA/Mass DOT, and Brookline that would address planning and permitting, governance and cost/ revenue sharing.

Conduct detailed feasibility analysis of how the current operations at the T site can be modified to maximize redevelopment opportunities without sacrificing functionality.

Study the implications for land values and operational efficiencies and other benefits to the transit systems that would result from modification of the existing transit infrastructure.

Convene a task force with members from both Boston, Brookline and MBTA/Mass DOT, possibly headed by neutral third-party

Prepare and ISSUE TAP REPORT

Primary Person: Writer/All TAP members, ULI Staff

Description: Writer to prepare TAP report and submit to the TAP Chair(s) within two to three weeks of TAP. TAP Chair(s) to review then send to TAP panel and Outreach Committee Chair(s) for review. Reviews should be due back to TAP chair(s) within 1 week TAP will be revised as determined by TAP Chair(s) and be ready for publication within 1 week by Writer See enclosed sample report.

TAP Report (and optionally Power Point) will be send to the Applicant/Sponsor, and selected Major Stakeholders with a cover letter from the TAP Chair(s). Report and Power Point will also be placed on local ULI web site and a copy may also be sent to ULI National

The ULI staff shall issue an Invoice for the TAP equal to the quoted amount to the sponsor within one week of delivery of the final report to the sponsor.

A Marketing release piece will be prepared either by the staff or a marketing firm and approved by TAP chair(s). This piece will be released to pertinent local papers and or other outlets as deemed appropriate. This should be done within one month of the TAP report being issued.

The TAP chair(s) may consider extending a thank you to the TAP panel in the form of a letter or certificate and as an example a free attendance to any one ULI local event.

Resources Needed: Report, Outline, Power Point

Sample TAP Report Outline

- 1. *Table of Contents***
- 2. *ULI Overview, TAP Program and Members, Stakeholder Acknowledgements***
- 3. *Sponsor's request and Purpose***
- 4. *Community/Locational Overview***
- 5. *Description of the Site / Study Area***
- 6. *Findings***
 - a. Objectives
 - b. Expectations
 - c. Issues
 - d. Challenges
 - e. Opportunities
 - f. Alternatives
- 7. *Recommendations***
 - a. ***Next Steps***

FOLLOW-UP

- Primary Person:* ULI Real Estate Advisory Committee, TAP Chair(s), ULI Staff
- Description:* Monitor the city's progress for a specified duration of time communication with and by sending out a form to the City Council or appropriate sponsor. See attached sample questionnaire. Follow up as necessary for possible additional TAP's
- Resources Needed:* Follow-up reporting form

Follow-Up Questionnaire

This form should be completed monthly by the City Council for up to two years following the completion of the project.

Project Name and City/State: _____

Please comment on the impact the project is having on the city/surrounding area.

Do you view the completion of the project to be an asset to the community? In what ways?

Does the community have a favorable opinion of the project's impact?

What are the issues of local concern right now?

Do you have any concerns that might require ULI's assistance? Do you foresee any complications in the future?

Completed By: _____ Date: _____

Urban Land Institute

Sample TAP Report and Power Point



Salem MA TAP
Report



Cleveland Circle TAP
PowerPoint presentat

On Line TAP Information, Resources and Examples

Here is a link to ULI Boston's TAP examples, applications and instructions:

<http://boston.uli.org/uli-in-action/taps/>

Here is a link to ULI National's TAPs home page where you can find additional information, TAP's and articles on TAP's:

<http://www.uli.org/programs/advisory-services/technical-assistance-panels-taps/>