



ULI Washington Technical Assistance Panel

Sample Briefing Book Guidelines

The following are a set of guidelines, please only include relevant information:

I. Introduction

1. Title page, table of contents

II. List of Sponsors

1. List of official sponsors with organizational background

III. The Assignment

1. Summary of the problem/scope, questions to be addressed by the panel

IV. History of the Site or Study Area

V. Description of the Study Area (as relevant)

1. Physical Description -
 - a. Location, boundaries, size
 - b. Land uses within the study area as well as surrounding areas (residential, commercial, industrial, institutional)
 - c. Topography, vegetation, natural resources, drainage, natural or manmade barriers or development constraints
 - d. Transportation and access; infrastructure and utilities – availability, location, capacity, condition
 - e. Vacant land – location, ownership, history
 - f. Special features, characteristics, and considerations
2. Economics of the study area
 - a. Employment types and trends
 - b. Major employers – location; size, number, and types of jobs
 - c. Unemployment – level and trends
 - d. Income data (individual and household)
3. Demographics
 - a. Overview study area population trends
 - b. Population size and distribution within the study area
 - c. Age distribution, number of households, household size
 - d. Educational levels
 - e. Special features, such as university students or public housing residents
4. Housing Market (if relevant)
 - a. City market conditions and trends
 - b. Housing types within the study area – SF, MF, ownership, rental
 - i. Location and number

- ii. Age, condition, occupancy status
 - iii. Sales prices or rent levels
 - iv. Tenure of occupancy: current estimates and past trends
 - c. Current and planned residential development
 - d. Competitive or alternative residential locations
- 5. Commercial development – current conditions and historical trends (if relevant)
 - a. Retail
 - i. Overview of area wide retail markets
 - ii. Retail development within the study area (including: location, size, type, tenant mix, goods and services offered, parking, access, lease rates and terms, physical condition, economic condition, unique competitive strengths and weaknesses)
 - iii. Competition (nearby commercial areas) – size, type, age, condition, access, tenant mix, level of activity
 - iv. Office (as above, if relevant)
 - v. Industrial (as above, if relevant)

VI. Government

1. Federal government activity affecting the study area
2. State laws or activity affecting the study area
3. County, if applicable: type of government; departments or agencies affecting the area such as police, fire, or health departments; relevant policies; programs, plan and regulations.
4. Local government
 - a. Type of government – structure; roles and responsibilities
 - b. Sources of revenue; taxation
 - c. Current plans affecting the study area, such as comprehensive plans, area plans, school system plans, capital improvement programs, etc.
 - d. Laws and regulations impacting land use and development in the study area (note any unusual or constraining provisions)
 - e. Agencies or departments with responsibilities in the study area; relevant local policies and programs (such as inclusionary zoning or subsidized housing program, economic development programs, school busing requirements, social service programs, etc.)
 - f. Local political representation: key issues; type and level of interest and activity

VII. Private Sector Involvement: Name, location, and briefly, the history, interests, policies, programs, resources, representation, and activities of each (as relevant)

1. Neighborhood associations or community development associations active in or affecting the study area
2. Schools, hospitals, churches, etc., within or affecting the study area
3. Financial institutions, foundations, major corporations active in or interested in the area
4. Business organizations
5. Others as appropriate (such as private social service providers)

VIII. Additional relevant information