

# ULI Washington Strategic Plan Update – FY2016-2020



Adopted December, 2016



## **VISION**

- ULI Washington is the most valued and respected real estate organization in the Greater Washington region

## **MISSION**

- ULI Washington is where real estate industry professionals, the public sector, and other thought leaders engage in sharing ideas, promoting best practices and innovative solutions, learning and educating to positively impact the built environment.

## **CORE VALUES**

ULI Washington will pursue its mission while adhering the following core values:

- Excellence – we achieve excellence in thought leadership and programming through the creative engagement of our members
- Responsibility – we seek objective, actionable solutions so that each of us, our communities, and our region will flourish
- Relationships – we foster meaningful, long-term personal and professional connections
- Inclusivity – we seek and value all types of diversity and alternative points of view
- Authenticity – we promote open and genuine participation to foster relationship building
- Trust – we create opportunities for sharing ideas and problem solving in an unbiased, fact-based manner to effect change in Greater Washington

## **DISTRICT COUNCIL PERFORMANCE GOALS AND METRICS**

There are three key initiative areas for the organization over the next five years, including:

### **1. IMPACT AND INFLUENCE**

#### **a) Objective:**

Be a catalyst for positive change in the region by Initiating, developing, and promoting best practices and innovation and providing thought leadership



b) Key Implementation Action Items:

Program of Work

- Identify and focus on two to three of the most critical land use and real estate issues as content themes; evaluate the relevance of themes yearly with input from a diversity of members
- Identify primary research topics related to the themes and engage a member champion to harness the energy around the topics
- Develop programs and events that reinforce the themes and provide unique, long-lasting take-home value that motivates people to action
- Effectively communicate the program of work and themes to members, decision makers and the public
- Become a partner and leader with local and regional organizations promoting ideas and policies consistent with the district council's themes
- Target high-level decision makers from the public and private sector to join and participate in district council activities

**2. MEMBER ENGAGEMENT AND SATISFACTION**

a) Objective:

- Deeply engage and retain a diversity of members through education, relationship building, personal development and community service

b) Key Implementation Action Items:

Member Satisfaction

- Design and implement a longitudinal member satisfaction/engagement survey
- Provide a positive, effective onboarding of new members
- Recognize individuals committed to the highest standards of responsible development
- Recognize and celebrate long term member commitment at milestone years (e.g., 10-, 15-, 20+ years of continuous ULI membership]

Convening & Connecting

- Increase opportunities for small group interactions
- Concentrate on smaller events (sweet spot – 100)
- Hold more social and relationship building activities for all groups of members (i.e. trivia night)
- Create programs targeted to YLG, mid-career and seasoned members
- Promote connections that are multidisciplinary and intergenerational
- Convene groups around common areas of interest



Leadership, Personal and Professional Development

- Create programs with specific leadership training components to assist with personal and professional development of those within the commercial real estate industry and ULI
- Coordinate and integrate the various leadership programs
- Provide members with a clear path of engagement and rotating leadership within ULI

Diversity

- Grow the diversity and interdisciplinary nature of actively engaged members who actively engage in the ULI network
- Expand opportunities for participation by women and minorities in ULI and industry leadership

**3. ORGANIZATIONAL STRENGTH**

a) Objective:

- Maintain long-term organizational strength with a responsible budget, staff that are engaged and productive, and effective governance

b) Key Implementation Action Items:

- Continue to maintain a healthy budget for the district council to fund its ongoing and new initiatives
- Spend reserves judiciously to meet impact goals
- Develop a program to increase sponsorship levels and net revenues from Trends and the Lifetime Achievement Award
- Create an annual fundraising strategy to include goals for a variety of sponsorship types including philanthropic, charitable and marketing
- Provide staff with opportunities for professional development, cross-training and consistent feedback to attract and retrain the most qualified and motivated professionals
- Share best practices with the network of other district councils and the national ULI staff



## Strategic Plan Metrics

### 2016-2017

#### Key Metrics – Impact and Influence

- Convene bi-annual Regional Forums on relevant topics to influence and inform regional thinking
- Publish two to three pertinent research reports or articles per year on key themes  
Partner with two to three regional land use and real estate organizations on projects and programs
- Diversify the membership base to include organizations that support real estate development activities (i.e., utilities, medical institutions)
- Create a “Creative Communications Plan” including goals on how the district council communicates to the media, members, non-member real estate professionals and the community
- Develop a survey tool to gauge the awareness and impact of ULI Washington

#### Key Metrics – Member Engagement and Satisfaction

- Achieve and maintain 80%+ member rating of either “highly engaged” or “very satisfied” with my ULI Washington membership (current benchmark TBD from 2016 survey)
- Increase the number and diversity of members serving on committees and initiative councils by 10% over the next five years. (Current Benchmark, Total # - 312; Under 35:27; Over 35:286; Male:199; Female: 113).
- Increase the number of member attendees at programs by 15% over the next five years (FY16 Benchmark = 4,929 total attendees)
- Increase the member retention rate 4% over the next five years (FY16 Benchmark = 69%)
- Increase the number and diversity of members serving on TAP panels and volunteering for UrbanPlan by 10% over the next five years. (Current benchmark, TAPs – Under 35: 7; Over 35: 148; Male: 206; Female: 51)
- Provide a component of leadership development in at least 35% of all ULI Washington programming (current TBD)

#### Key Metrics – Organization Strength

- Design an effective governance and management structure and review it yearly to ensure the structure meets the district council’s current needs
- Maintain responsible balancing of the budget within the reserve guidelines
- Increase Annual and Trends sponsorship as a percentage of the overall district council revenue (Benchmark Annual: 20%; Benchmark Trends: 10%; Future Annual: 22%; Future Trends: 12%).
- Maintain appropriate staff capacity to accomplish the strategic goals of the district council



## ULI WASHINGTON THEMES 2016-2017

### **1. Housing Affordability**

The conventional public policy indicator of housing affordability in the United States is the percent of income spent on housing. Housing expenditures that exceed 30 percent of household income have historically been viewed as an indicator of a housing affordability problem. Housing affordability difficulties are not only part of the low income household spectrum. Among the factors contributing to high rents and income inequality are antiquated rules on construction, housing and land use and local opposition to housing density. The public sector, private sector, financial institutions and citizens all have a role to play in increasing the supply and affordability of housing.

### **2. Regional Economic Health and Competitiveness**

To enhance regional economic health, there must be a positive and sustainable economic trajectory in the Washington, DC region. There is a need to strengthen employment opportunities, provide a high quality of life for current and future residents, seek new ways to boost competitiveness against other regions, and ensure that our local economy is resilient to change.

### **3. Disruption Trends and Technologies**

Paradigm shifts in other industries are bringing disruption to real estate. From new ways of financing development to shared space to smart buildings, innovation is shaping the way buildings are developed, managed, and used. Such trends as the Internet of Things, Big Data, Crowdfunding, and Virtual Reality are integral parts of real estate growth in the future. Examination of the impacts of these new technologies and trends is necessary to understand how they will impact the way that the industry carries out its business.