

# STRATEGIC PLAN



## A Toolkit for ULI Alberta Members and Partners

Compiled from the District Council's Strategic Plan Workshop, 2019.



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# MISSION

**The Urban Land Institute provides leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.**

**ULI is the oldest and largest network of cross-disciplinary real estate and land use experts in the world. ULI is its members. Through our members' dedication to the mission and their shared expertise, the Institute has been able to set standards of excellence in development practice.**

ULI Alberta is the 3rd Canadian District Council of the Urban Land Institute. With over 230 members, we are continually exploring new ways to expand our presence in the Province of Alberta.

We carry forth the ULI mission by serving Alberta's public and private sectors with pragmatic land use expertise and education.

As a nonpartisan organization, ULI has long been recognized as one of the most respected and widely quoted sources of objective information on urban planning, growth and development.

Our members form a spectrum of land use and development disciplines, including developers, builders, investors, designers, public officials, planners, architects, real estate brokers, lawyers, engineers, lenders, academics and students.

Members of the Urban Land Institute District Council of Alberta are automatically members of ULI National.



WILL CRAIG

District Council Chair

## **In the years ahead, we will extend our reach as an organization and catalyze new partnerships.**

In my time as a member of the most preeminent organization in the real estate industry, I have been privileged to experience the full array of what ULI has to offer, through various levels of the organization, from young leader to national council to district chair.

I have seen the power that resides within this organization to connect people and build communities. The way cities and communities are being built today requires a cross-disciplinary approach to city-building, which is reflected in ULI's core values and a lasting commitment to its members.

The strategic planning framework outlined here will focus on advancing the Alberta District Council's mandate over the course of the next five years. It serves as an embodiment of the collaborative process undertaken by the District Council's management committee to agree upon relevant goals, objectives, guidelines and strategies for success in shaping the future of our Council and the Alberta region.

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# STRATEGY

**This plan will serve as a guide for future direction and achievement by identifying areas of opportunity and advancement.**

The Strategic Direction provides an outline of goals, resources and actions that our District Council will adopt and measure for success. The direction is a result of collaboration between our District Council executive and management committee, governance committee, initiative council leadership, member volunteers and staff.

**Over the next five years we will focus on the following key initiatives:**

1. Expand network, thought leadership, and outreach.
2. Grow programs and people.
3. Create local impact by engaging public and private sectors.
4. Sustain our District Council and establish a solid foundation for future growth.

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# 1

## Expand Our Network, Thought Leadership & Outreach

### What we plan to achieve:

We plan to engage our members and the broader real estate community to identify and deliver opportunities that will shape the industry of the future. In order to do this sustainably, we must continue to focus on maintaining our stakeholder relationships and cultivating growth through the Young Leaders Group and student engagement.

### How we plan to achieve it:

We will continue to educate the industry on the value of ULI Alberta through events and programs that develop and deepen partnerships with other relevant organizations in Alberta.

We will focus on becoming the most engaged industry association in Alberta and aim to provide the best offerings to young professionals for career growth, mentorship, education and networking in the industry.

### Where we plan to start:

We will continue to identify relevant stakeholders, industry groups, and associations through which a partnering opportunity would yield significant exposure and/or growth potential and appoint sponsor ambassadors and encourage more sponsor-hosted events.

Build knowledge of ULI Alberta through events and programs that will develop partnerships with other relevant organizations.

Encourage participation of Young Leaders and students by creating programs that will shape the industry of the future (e.g. YL peer-to-peer sessions, Urban Plan, Mentorship Program, student competitions).

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# 2

## Grow Programs & People

### **What we plan to achieve:**

Offer programs that provide regular, stimulating content and opportunities to connect with industry. Capitalize on ULI's differentiators in the industry and demonstrate enduring value for our members and sponsors.

Attract and retain new and existing sponsors to our organization.

### **How we plan to achieve it:**

Increase value for attendees at our events by leveraging programs.

Continue to expand our member and sponsorship bases by personalizing the experiences we create within the organization.

### **Where we plan to start:**

Create high impact events and establish pre-event/event/post-event planning practices and standards.

Establish and market a programming schedule well in advance for both Calgary and Edmonton. This should include a minimum of four marquee events per year in addition to Young Leaders programs and product tours.

Promote member benefits through active marketing and create new member orientation procedures and content.

Promote ULI centers of excellence and align with professions in order to offer learning accreditations.

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# 3

## Create Local Impact by Engaging Public & Private Sectors

### What we plan to achieve:

Deliver initiatives that will enhance understanding and trust amongst citizens, industry and government to encourage collaboration and unlock innovative solutions.

### How we plan to achieve it:

Establish a reputation throughout the local industry as a knowledge hub and resource for effective public/private partnering.

### Where we plan to start:

Deliver events that encourage attendance from public partners.

Identify and promote local and global knowledge, resources, and expertise available through the vast ULI network.

Create a member connector role within the organization to catalyze collaboration.

Identify key public partners and establish a communication strategy.

Involve ULI Alberta members in public committees (both through incoming requests and outreach).

Offer and promote Technical Advisory Panels (TAP)s and Urban Plan programs for private and public officials.

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# 4

## Sustain Our District Council & Establish a Solid Foundation for Future Growth

### What we plan to achieve:

Maintain strong, positive annual cash flow and increases to reserves on a year-to-year basis in order to enable the execution of our mandate and key initiatives.

Implement a member-driven organizational structure and provincial governance model to sustain our District Council (DC).

Ensure continuity of strategic objectives through transitions in volunteer roles.

Operate as a collaborative DC, accounting for interdependencies within ULI (locally, regionally, globally).

### How we plan to achieve it:

Continually monitor revenues and resources while building financial capacity to support our future.

Focus staff and volunteer resources on maximum impact growth as a DC.

Outline succession plans for management, governance and executive committees.

Leverage platforms/tools available through ULI for collaboration and coordination between committees.



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# 4

## Sustain our District Council & Establish a Solid Foundation for Future Growth

### Where we plan to start:

Continue to build financial capacity for the future through increased sponsorship and membership.

Develop a province-wide resource plan and establish roles and responsibilities for the Board and governance/advisory committee.

Balance committee role representation to reflect local member composition across Alberta and operate as a single, regional District Council.

Establish a succession plan for all leadership positions and develop and implement an on-boarding process for new committee members.

Create a platform for initiatives, reporting, and regular board updates and to share outcomes, event info and meetings geographically.

Maintain a common calendar for all committee meetings and event schedules to be shared among leadership and to support Business Development efforts.

Create a common database for event planning, communication and file-sharing.

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# LOCAL IMPACT

**ULI's impact at the local level is contingent on our ability to deliver consistent, high quality programming and engaging content.**

**ULI Alberta hosts four signature events annually. Special interest programs, Young Leader's events, tours, seminars and workshops are hosted monthly in both Calgary and Edmonton.**

## Sample Programming Timetable:

January	<b>Emerging Trends and Real Estate Outlook* (Calgary &amp; Edmonton)</b>
February	Lunch & Learn (YL) YL Social
March	Project Tour
April	ULI National Spring Meeting Lunch & Learn (YL) Canadian City Catalysts Council Day
May	<b>ULI Centres of Excellence Event*</b>
June	City Design Tour Lunch & Learn (YL)
July	YL Social
September	Member Orientation Mentorship/Student Engagement Event (YL) Lunch & Learn (YL) Urban Plan (Universities) Kick Off
October	ULI National Fall Meeting
November	<b>Fireside Chat event*</b> ULI Alberta Symposium Canadian City Catalysts Council Day
December	Lunch & Learn (YL) ULI Holiday Social

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# MANAGEMENT COMMITTEE



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*District Council Chair*  
Kasian – Senior Associate



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*Governance Chair (Past DC Chair)*  
GWL Realty Advisors – Director,  
Corporate Development



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Bucci Developments – Director of Sales,  
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**To the sponsors, leadership, member volunteers and staff that contribute to the ongoing success of ULI Alberta, thank you for your commitment to ULI and to industry excellence in your communities.**





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Images from artist website; Alberta artist, Van Charles,  
EAST VILLAGE RIVERWALK PROJECT in Calgary, AB (2018).