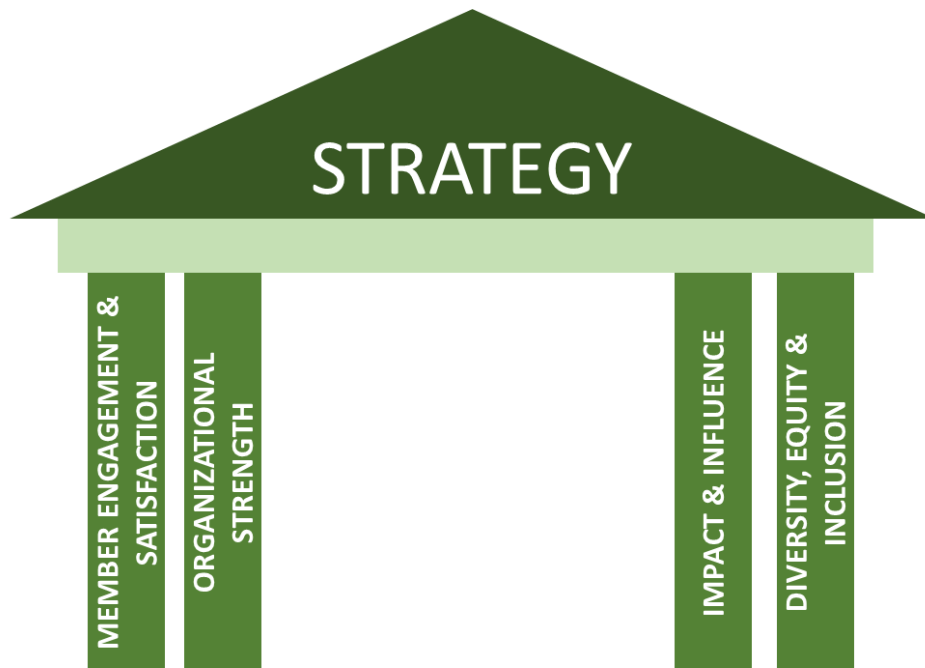




STRATEGIC PLAN UPDATE

2020 – 2023



MISSION: Where public and private land use professionals in the Washington region come together to foster relationships, learning and leadership to meaningfully impact their careers, communities, and industry.

VISION: To be the most trusted real estate organization that propels a thriving, sustainable and equitable Washington region.

September 2020

I. INTRODUCTION

In July 2020, members of ULI Washington’s leadership participated in a virtual retreat to confirm strategic priorities for the next three years. In preparation for the retreat, ULI Washington convened five focus groups with members, regional planning directors, partners and staff. Focus group participants are listed in Appendix A. The result of this work is the following update to the FY16 Strategic Plan.

II. VISION / MISSION /VALUES

Vision: To be the most trusted real estate organization that propels a thriving, sustainable and equitable Washington region.

Mission: Where public and private land use professionals in the Washington region come together to foster relationships, learning and leadership to meaningfully impact their careers, communities, and industry.

Core Values: ULI Washington pursues its mission through the following core values:

- **Trust:** We create opportunities for sharing ideas and problem solving in an unbiased, fact-based manner to effect change in the Washington region.
- **Diversity & Inclusion:** We engage professionals with diverse backgrounds and perspectives and strive to create a welcoming environment for all.
- **Relationships:** We foster meaningful, authentic long-term personal and professional connections.
- **Responsibility:** We seek objective, actionable solutions so that each of us, our communities, and our region will flourish.
- **Excellence:** We strive for excellence in thought leadership and programming through high quality engagement with our members.

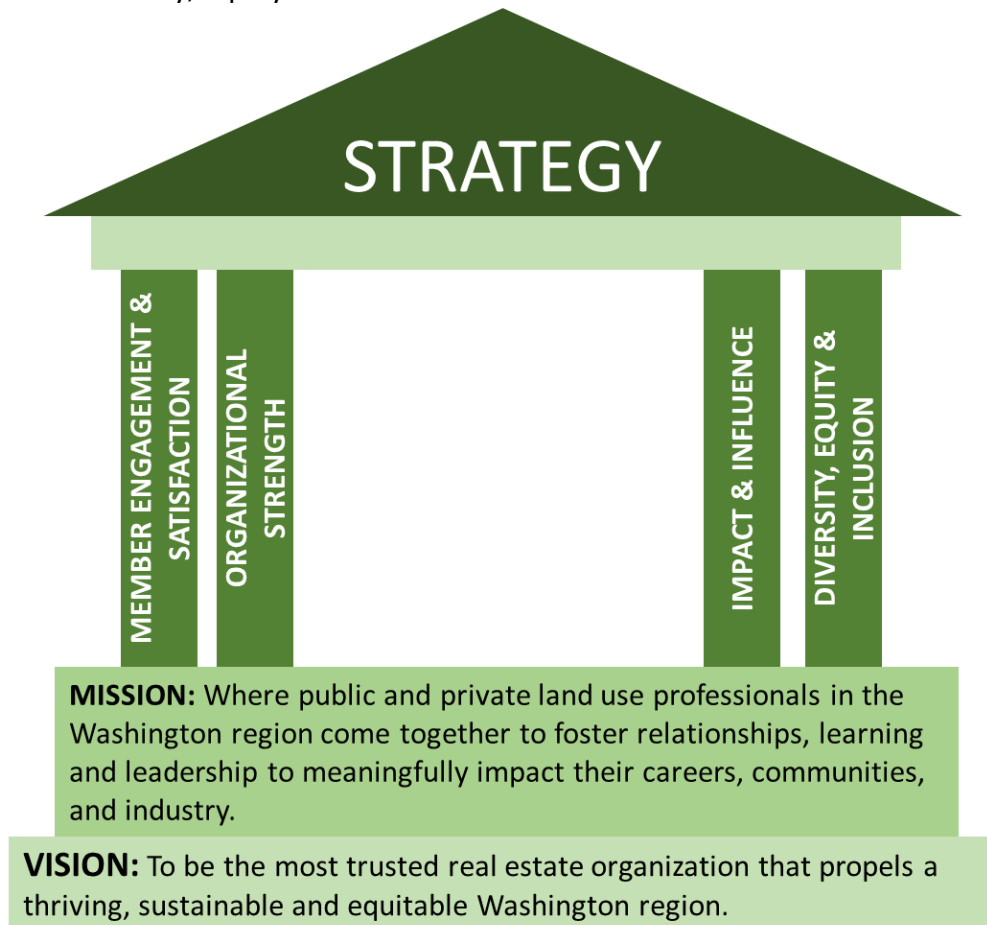
III. PILLARS AND STRATEGIC PRIORITIES

ULI Washington’s FY16-20 Strategic Plan identified three key pillars that define our work and impact:

1. Member Engagement and Satisfaction
2. Organizational Strength
3. Impact and Influence

The FY20 Strategic Plan Update adds a fourth pillar:

4. Diversity, Equity & Inclusion



The strategic priorities, goals, actions and metrics associated with each pillar are listed below.

1. MEMBER ENGAGEMENT & SATISFACTION

Priority 1.1 DIVERSIFY MEMBERSHIP AND OPPORTUNITIES

GOAL: Become a stronger organization that is more representative of the region by expanding the demographic and industry diversity of ULIW's membership, leadership and programs.

ACTIONS

- Data: Collect data on membership demographics and industry sector representation.
- Diversity Goals: Establish goals that ensure ULIW membership, leadership, speakers and programs reflect the diversity of our region.
- Industry Targets: Annually select one or two under-represented industry sectors for targeted outreach (e.g., public sector, students & universities, small businesses, retail/hospitality).
- Recruitment Strategy: Develop strategies to attract members & leaders of under-represented groups including active recruitment, mentorship and outreach (e.g., Pathways).
- Partnerships: Foster relationships with partner organizations (HBCUs, AAREP, WCCD).

METRICS

- Track and report annually on progress towards diversity goals including:
 - Membership
 - Leadership
 - Committees
 - Panels/Speakers
 - ULIW Programs
- Track and report annually on progress towards industry targets for under-represented sectors.

Priority 1.2 STRENGTHEN MEMBER ENGAGEMENT

GOAL: Strengthen opportunities for career-long and year-round membership engagement.

ACTIONS

- Transparency: Clearly communicate ULIW's organizational structure and opportunities for member engagement throughout the year.
- Career-long Engagement: Create engagement opportunities for all stages of members' careers.
- Relationship Building: Create more opportunities for relationship building at all levels (See Appendix B).
- Data: Collect member input on content/programs.

- Promotion: Celebrate and communicate achievements of ULIW members through communications platforms.

METRICS

- Collect, track and analyze membership and engagement data:
 - Membership totals, tenure and retention percentage (esp. post YLG)
 - Total members engaged in ULIW opportunities
 - Application totals for ULIW committees and other opportunities
 - Event registrations

2. ORGANIZATIONAL STRENGTH

Priority 2.1 EXPAND AND DIVERSIFY REVENUE

GOAL: Create a sustainable revenue model with diversified revenues that ensures stable support for ULIW’s work and mission.

ACTIONS

- Financial Plan: Prepare a diversified financial plan with a balance of earned (contracts) vs. contributed (sponsorship) revenue.
- Corporate Partnership: Expand and enhance corporate partnership program, including annual partner and revenue targets.
- Expand Revenue Sources: Explore new revenue opportunities such as fee for service (e.g., UrbanPlan, leadership training, development economics training).
- Philanthropic Partnerships: Explore ways to create and grow philanthropic opportunities for members, including endowment opportunities.
- Reserve Plan: Prepare a Reserve Plan that identifies investment priorities.

METRICS:

- As part of regular financial reporting, track and report on
 - Percent of annual revenue generated from each source
 - Percent change in revenue sources
 - Percent of revenue from new recurring sources (e.g., fee for service opportunities)
 - Percent of reserves used to cover operating losses

Priority 2.2 CULTIVATE STAFF AND LEADERS

GOAL: Attract and retain high performing staff and member leaders and foster the skills needed to meet strategic priorities.

ACTIONS

- Transparency: Clearly communicate ULIW’s organizational structure and leadership opportunities.
- Leadership Pipeline: Identify and foster future leaders, esp during the transition from YLG.
- Leadership Succession: Create succession plan and paths for leadership; engage and leverage experience of former Officers, Advisory Board members & full members.
- Staff Capacity: Build team with the skill set to execute on strategic priorities.
- DEI Capacity: Provide DE&I Training to all ULIW staff and leaders

METRICS

- At least one DEI training session per year for staff/leadership
- Track and report on DEI metrics in annual report
- Track and report on leadership and retention metrics
 - Number of leadership opportunities and applicants
 - Leadership pipeline; conversion rate from pipeline to leader

3. IMPACT & INFLUENCE

Priority 3.1 MARKET DYNAMICS AND DISRUPTION: POST-COVID AND BEYOND

GOAL: During a period of rapid change and market disruption, create opportunities to learn and share timely information and innovative solutions that advance industry and regional resilience, post-COVID and beyond.

ACTIONS

- Annual Priorities: Select two to three focal areas each fiscal year: e.g., the future of cities, COVID impact on design (See Appendix C).
- Data: Regularly survey members to provide real-time input on trends and market adjustments (See Appendix C).
- Learning Cohorts: Track changes and metrics, explore solutions, identify potential impacts, problem solve and publish findings through:
 - New and existing initiative councils
 - Curated conversations: interdisciplinary, invite-only, small group discussions (e.g. Retail Roundtable).
- Advocacy: Engage with public sector on development of new public policy tools to address industry and regional challenges.
- Partnerships: Develop partnerships to develop, distribute & deploy content, including universities, think tanks, brokerage and research companies, and media.

METRICS

- Track ULIW program activities
 - A regional forum that convenes leading national and regional experts
 - At least two (2) public events on focal areas including one partner event
 - At least one white paper/year
- Track ULIW public outreach
 - Media coverage including one Op-Ed
 - Two (2) meetings annually with DMV policy makers

Priority 3.2 HOUSING AFFORDABILITY

GOAL: Promote increased housing production and affordability in furtherance of the Metropolitan Washington Council of Government’s regional housing targets.

ACTIONS

- Advocacy: Advise policy makers on practical solutions to increase housing production and affordability that builds on the ULIW’s Housing Attainability Report.
- Innovation: Promote new methods of construction/design that decrease cost of housing through technical assistance, ICs, white papers.
- Education:
 - Promote affordable housing best practices to the public and private sectors.
 - Foster constructive community engagement through expansion of UrbanPlan for community leaders and public officials
 - Develop training on development economics and affordability for public officials
- Partner: Explore partnership opportunities to track and promote regional progress on affordable housing (e.g., HAND’s [Housing Indicator Tool](#)).
- Community Engagement: Train ULIW members to promote housing affordability in their local communities (e.g. ANCs).

METRICS

- Track influence on public dialogue:
 - 2+ news articles or op-eds on housing solutions
- Track ULI W programs
 - Regional Forum on housing solutions
 - At least two meetings to advise housing policymakers

Priority 3.3 DIVERSITY, EQUITY & INCLUSION

GOAL: Advance industry diversity and inclusion and foster equitable development practices.

ACTIONS

- Education: Raise awareness of the real estate and land use industries’ role in creating and perpetuating racial disparities.
- Equitable Development: Promote equitable development practices through sharing best practices, policy remedies and technical assistance.

- Talent: Improve industry diversity and inclusion through training and outreach.
- Awards: Elevate the contributions of diverse professionals and models of equitable development through awards and other recognition
- Implement DEI working group recommendations (See Exhibit 1).

METRICS

- Track and report on DEI in ULIW programming
 - One regional equitable development forum/year
 - At least one DEI training/year for leaders and members
 - Three (3) DEI education programs/year
- Track and report diversity in ULIW awards

4. DIVERSITY, EQUITY & INCLUSION

NOTE: This section summarizes the DEI goals and actions from other sections of the plan.

GOAL: Foster a more diverse, equitable and inclusive real estate and land use industry by making DE&I foundational to all aspects of ULI Washington’s work.

ACTIONS

MEMBER ENGAGEMENT & SATISFACTION

- Set goals and expand diversity of ULI membership, leadership, speakers and programs.
- Develop strategies to attract members & leaders of under-represented groups
- Foster relationships with partner organizations

ORGANIZATIONAL STRENGTH

- Provide DE&I training to ULIW staff and leaders.

IMPACT AND INFLUENCE

- Raise awareness of the role of land use and real estate in creating and perpetuating racial disparities.
- Foster equitable development practices
- Improve industry diversity and inclusion through training, outreach and programming.
- Elevate diverse professionals and models of equitable development through awards.

METRICS

- Track and report annually on diversity of membership, leadership, speakers.
- Track and report on DEI programming
- Host at least one DEI training/year
- Track and report on diversity in ULIW awards
- Report on DE&I metrics in Annual Report

IV. STRATEGIC PLAN IMPLEMENTATION

ULI Washington staff and leadership will create systems and structures that provide accountability and oversight to ensure implementation of the strategic plan, including:

- Codify: Identify and codify responsibility for each pillar of the strategic plan.
- Action Plan: Complete Action Plan (Exhibit 2) and workplan that identify the timing of deliverables and responsible entities.
- Impact:
 - Prioritize impact themes and integrate into all ULIW programming.
 - Identify impact methods highlighting tangible ideas from other DCs and organizations (white papers, media outreach, events) and share with Mgt Committee.
- Track and report progress on strategic plan implementation bi-annually.

APPENDIX A

FOCUS GROUP PARTICIPANTS

ULI Washington Members

- Stephen Gregg (FY 20 co-chair, Young Leaders Group, VP of investments with Equity Residential)
- Alisa Rosenberg (FY20 co-chair, Women’s Leadership Initiative, developer formerly with Bozzuto, now with Fore Properties)
- Bob Peck (FY20 co-chair, Technical Assistance Panel, former Advisory Board member, senior executive at Gensler (design) formerly with GSA)
- AJ Jackson (ULI National Trustee, leads social impact investing for JBG Smith)
- Erin Talkington (former YLG co-chair, consultant for RCLCO – economics research and consulting firm)
- Joe Magnotta (NEXT co-chair, developer formerly with EYA now with Fortis)
- David Kitchens (TOD council and Trends Conference Committee, Principal at Cooper Carry (Design))

Regional Planning Directors

- Gwen Wright, Montgomery County
- Andrew Trueblood, DC
- Bob Duff, Arlington
- Karl Moritz, Alexandria
- Marcel Acosta, NCPCC

Partners (1)

- Uwe Brandes, Director, Georgetown University Masters in Urban Planning
- Babatunde Oloyede, Marshall Heights CDC
- Maura Brophy, Director of Infrastructure and Transportation, Federal City Council
- Stewart Schwartz, Coalition for Smarter Growth
- Sarosh Olpadwalla, DMPED
- Chris Leinberger, Chair, Center for Real Estate and Data Analysis; Founder Places Platform

Partners (2)

- Shyam Kannan, VP of Planning, WMATA
- Hillary Chapman - Director of Housing Initiatives, COG; ULI Housing Initiative Council co-chair
- Catherine Buell – Head of Community Development, Amazon; formerly Director of Policy and Programs, Greater Washington Partnership
- Peter Shapiro - Exec Director, Prince Georges County Revenue Authority
- Rich Bradley - Georgetown Univ. Masters in Urban Planning; formerly Downtown BID, Developer Roundtable

ULI Washington Staff

APPENDIX B

ADDITIONAL INPUT FROM RETREAT COMMITTEE

PILLAR ONE: MEMBER ENGAGEMENT & SATISFACTION

Priority 1.2 STRENGTHEN MEMBER ENGAGEMENT

Ideas for Relationship Building at all levels:

- Buddy system at member onboarding
- Explore member groups of various sizes (e.g. Peer Exchange Group)
- Provide intentional relationship building opportunities for mid-career professionals
 - o Small group mentorship opportunities for members transitioning from YLG to NEXT
 - o Consider the pipeline from YLG to NEXT/Leadership Institute/ICs

PILLAR THREE: IMPACT AND INFLUENCE

Priority 3.1. MARKET DYNAMICS AND DISRUPTORS: POST-COVID AND BEYOND

Topics for annual focus:

- Long lasting behavioral changes and impact on Land Use/Typology: Retail, Industrial & Distribution, Placemaking, Mixed Use, Future of Office, Future of Cities and Impact on Density
- Climate Change and Resilience
- Other: Transit/Infrastructure, Health & Wellness, Public Sector Fiscal Health

COVID Survey topics/metrics:

- Telework by jurisdiction and sector
- Commuting patterns
- Retail occupancy/closures/rental rates
- Office vacancy rate/absorption/average SF per employee?
- Residential unit size/amenities
- Housing ownership/rental demographics

APPENDIX C

**ULI WASHINGTON DIVERSITY, EQUITY & INCLUSION WORKING GROUP
RECOMMENDATIONS**

DEI Working Group	Co-Chairs	Adam Weer (Trammell Crow) and Dawnita Wilson (JBG Smith)
SUBCOMMITTEES	LEADERS	GOAL
Education and Awareness (EA)	Sonja Ewing Justin Schor	Provide ULI members the tools and resources to identify and address systemic discrimination in real estate and land use policies and practices.
Engaging & Connecting Diverse Talent (DT)	Evan Weisman	Enhance & expand the representation, engagement & professional mobility of diverse talent within ULI Washington and the real estate industry.
Strengthening Diverse Communities (SDC)	AJ Jackson Marisa Flowers	Promote equitable economic development and community empowerment.

I. Education & Awareness

- Action Items (Complete / In Process)
 - **DEI Training:** Provide DEI training for leaders and members
 - **ULI Communications Content:** Feature content on social media that promotes equitable development and address the impacts of industry discrimination and bias.
 - **DEI Resource Hub:** Create online forum for members to access and share information on race and equity in the industry.

- 2021 Action Items
 - **Webinar Series:** Establish quarterly DEI-focused webinars and small group discussion opportunities; sharing research/articles to further understanding.
 - **Leadership Roundtables:** Raise awareness of issues of race and real estate in more intimate forums with personal reflections from industry leaders.
 - **21-Day Challenge:** Create an Education Challenge that provides self-directed ways for ULI members to deepen their knowledge of DEI and its impact on our industry and region.

II. Engaging and Connecting Diverse Talent

- ULI Washington Action Items (2021)
 - **ULI Data Collection:** Obtain demographic data from ULIW members and report annually on diversity stats, goals and progress.
 - **Diversify ULIW membership:** Expand partnerships and strategies (i.e., Pathways) to attract diverse professionals to ULIW.
 - **Expand DEI membership engagement opportunities:** Administer annual member survey to identify areas of interest for meaningful DEI engagement opportunities and programming.
- Industry Action Items (2021+)
 - **Promote opportunities for diverse youth/students in CRE:** Connect local CRE internship programs to diverse youth organizations and schools.
 - **Collect demographic data on ULIW member companies:** Collect and report on demographic data of member organizations with a goal of fostering improved tracking of industry diversity metrics/stats.
 - **Promote recruitment and mentorship of diverse talent at ULIW member companies:** Share best practices and resources for successful DEI mentorship and recruiting models being utilized by member organizations.
 - **Corporate Pledge:** Develop a statement of commitment to equity (in collaboration w/ULI National) that real estate firms could adopt.

III. Strengthening Diverse Communities

- 2021 Action Items
 - **UrbanPlan for Communities:** Expand reach for UrbanPlan and increase the number of UrbanPlan pilots in diverse communities throughout the region.
 - **Annual awards:** Assist in the ongoing efforts to update ULI awards (ULIW + National) to ensure equity lens is embedded in awards and selection process.
 - **Equitable Development Training for Members:** Provide training to ULIW members designed to expand understanding of and capacity for equitable development