



**Urban Land  
Institute**

**Baltimore**

**ULI Baltimore**

## **Technical Assistance Panel (TAP) Manual**

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## I. The Technical Assistance Panel (TAP) Program

Technical Assistance Panels known as TAPs are part of ULI's Advisory Services Program. ULI advisory services panels provide strategic advice to sponsors on complex land use and real estate development issues. The program links public agencies and nonprofit organizations to the knowledge and experience of ULI and its membership. ULI was established in 1947. The TAPs are a fee-based program. ULI has completed over 800 panels, across the United States, and 12 countries over 4 continents. The Advisory Services program has been successful due its comprehensive, pragmatic approach to solving land use challenges.

Each panel follows a proven process that begins with a conversation between ULI staff and the sponsor to frame the assignment. ULI then assembles an interdisciplinary panel of volunteers who spend time on-site exploring the project, interviewing stakeholders, and making recommendations. Panels approach the assignment from all perspectives, including market potential, land use and design, financing and development strategies, and organizing and implementation.

### **Purpose**

ULI Baltimore began holding TAPs in 2008 as a way to bring together the public and private sector and to provide an outlet for our members to give back to the community. While initially TAPs were offered to private sector sponsors, it was soon realized that our members found it more rewarding to volunteer their time to aid an agency or a nonprofit organization (as opposed to a peer) and as a result were more willing to give their time and experience to the projects. We now only offer the service to public agencies and nonprofit organizations and have developed positive relationships as a result.

### **District TAP Policy**

ULI Baltimore encourages Sponsors to seek solutions through the private market. Requests for Proposals (RFPs) can be an effective tool to solicit input to answer questions relevant to TAP issues. The ULI Baltimore District will not compete against private interests that offer solutions similar to TAP outcomes. Often the ULI Baltimore District TAP selection process includes a needs analysis which inquires whether RFP options were investigated.

### **Format**

TAP formats vary based on the specifics of the project and available funding. TAPs are typically held over the course of two-days in the sponsoring agency / organization's community. The first day typically begins at 8:00am with a introduction and tour of the study area either by bus and on foot, and is followed by a briefing by the sponsor and others, and then transitions into roundtable discussions where the sponsor invites vested stakeholders in the community to participate in an informal roundtable conversation with the panel. After the public engagement roundtable discussions, the panel attends a private working dinner where the chair directs a conversation, debriefing on the day and getting the panel's initial impressions.

The second day is spent behind closed doors, and the panel spends the entire day in general discussion and break-out sessions responding to the sponsor's issues and questions. At the end of the day a presentation is made to the sponsor and invited guests where the panel provides a summary of the recommendations. A PowerPoint presentation of the findings is given to the sponsor at the end of the second day, and within six to eight weeks a final written report is delivered.

## **Participants**

Each panel is comprised of eight to ten senior level ULI members who are respected in their field. This is a privilege of membership and nonmembers should be engaged only if the right expertise is not available within the membership. Typical panels include a chair, two developers, a market analyst, two to three people to make up a planning and design team, a member of the public sector or a nonprofit organization, a member of the Young Leaders Group, and someone with relevant niche experience depending upon the assignment (e.g. traffic engineer.) Members volunteer their time to participate in the panel.

## **Product**

Upon Completion of the TAP, the sponsor is left with a PowerPoint presentation that summarizes the panel's recommendations. The PowerPoint is completed onsite during the last hour of the panel and includes renderings that were drawn on site. Sponsors are given the PowerPoint so that they have the recommendations in hand and something to share with the community over the course of the six to eight weeks that it takes to complete the written report.

The written report is drafted by ULI Baltimore district and commented on by both panel members and the sponsor. It can take up to eight weeks to complete the written report because of all the parties that need to sign off on the draft prior to it going to print. The TAP reports are a product of the Urban Land Institute, and only ULI shall control the content of the report. Prior to production of the report a Draft is typically shared with the client to review. The ULI District and the sponsor shall cooperatively review the contents of the report. However, ULI has final say in the content and format of the ULI TAP Report. Once complete, the report is saved as pdf and provided to the sponsor in electronic format.

# II. The Committee

## **Committee Makeup**

The committee, lead by a chair should consist of approximately ten to twelve panelists, including at least one member of the Young Leaders Group. Members of the committee are determined based on their interest in the TAP program, but also their ability to help market the program. The typical committee is multi-disciplinary and includes developers, architects, planners and those who provide other professional services.

## **The Role of the Committee**

While any qualified ULI member can serve on a TAP, the committee has the responsibility of managing the quality of the program, sourcing panels, and serving on panels as a committee liaison.

Quality Management. Each committee member should fully understand the program, its goals and objectives, as well as its marketing plan and materials. Every effort should be made by the staff and committee members to ensure that the district council is presenting the best program possible.

Sourcing Panels. Committee members are chosen in part based upon the connections they have with local public agencies and nonprofit organizations. Committee members should make every effort to schedule meetings with these potential sponsors to explain the program and continually look for ways to suggest how a TAP can aid a particular agency or project.

Committee Liaison. Each TAP should include a member of the TAP subcommittee. Currently, the TAP subcommittee is a subset of the Baltimore District Council Regionalism Committee. The liaison keeps the committee members engaged in the program and helps ensure a consistent experience and product. Committee liaisons should participate in all meetings held in the anticipation of the panel.

### **Committee Meetings**

The ULI Baltimore District Committee meetings are held at the offices of a committee member. These meetings occur as needed so that all needed TAP Panel members have the TAP schedule on their calendar. Typically, District staff prepares the agenda with the help of the TAP chair.

Typical TAP Committee meetings review recent panels and lessons learned from the experiences; upcoming and prospective panels; followed by discussions of tasks, roles and schedule to prepare for the TAP. Marketing of TAPs and additional business generally follows. Minutes are produced afterwards and circulated via email.

## **III. Working with the Sponsor**

ULI staff, the committee liaison, and/or the panel chair should attend all substantive meetings with the sponsor. ULI staff alone should take care of all logistics with the sponsor in preparation for the TAP.

### **Initial Meeting**

Whether you receive a formal application from a potential sponsor or a phone call asking to learn more about the program, it is important to schedule an initial meeting to vet the potential sponsor and explain the program. This can be done by the staff member alone, but preferably the chair of the committee or a committee liaison should attend.

### **The Planning Meeting**

Once the sponsor has agreed to pursue a TAP, and ULI believes that the general scope and sponsor can both fit within the program's format, a second meeting should be scheduled to finalize the assignment. The chair of the panel should be chosen prior to this meeting and should definitely attend along with the committee liaison.

At this meeting the following should be accomplished:

1. Set date for the TAP (a minimum of six to eight weeks out)
2. Define / refine scope of panel including issues and questions to be addressed
3. Review draft agenda for the TAP (see Appendix)
4. Review responsibilities of the Sponsor and of ULI (see Page 7)

Background Statement. The sponsor should be charged when leaving the meeting to draft a background statement set of questions if they have not done so already. The background statement is a one to two page summary of the background and history of the study area, the role of the sponsor, the issues that need to be addressed, and the goals of the sponsoring organization as they relate to the study area.

Scope. In the planning meetings it is important to manage the expectations of the sponsor to develop a work plan that can be accomplished within a day and a half. It is important to provide sample reports to the sponsor so that they have an idea of the depth of coverage of a TAP. Some sponsors expect a full blown

market analysis and development strategy when in reality they are given a brief analysis of what can and cannot be supported with additional study generally needed. Depending upon the sophistication of the sponsor, or the targeted nature of the assignment, the sponsor may come to the table with a predetermined set of issues / questions. It is actually helpful that prior to the planning meeting you request that the sponsor draft a set off issues / questions from which you can work together on to refine the scope.

By reviewing past panel information one can get a fairly good idea of what is manageable in the course of the TAP. There will be new issues that arise on the day of the panel so it is important not to commit to focusing on too much at the onset.

If the scope seems to be beyond what can be accomplished during the course of a TAP, it is important to make sure that the sponsor knows that there is an option to conduct a national Advisory Services Panel that will be able to cover more ground.

Questions. The TAP questions should range anywhere from five to ten questions that are in line with the type of expertise that ULI members can offer – questions should not delve into social issues but should rather focus on real estate and land use. A good format to follow is to have the questions fall under the categories of:

- Market Potential
- Development Strategies
- Planning & Design
- Implementation

Questions should be written to elicit discussion from the members rather than a yes/no answer. Depending upon the sophistication of the sponsor, it may be necessary for ULI staff to help draft the questions based upon the agreed upon scope – and staff's knowledge of what the panel can/should accomplish. Questions can then be sent to the sponsor for review.

### **Agreement**

After the second meeting a contract should be drawn and signed both by ULI and the Sponsor. ULI Baltimore's agreement has been very simple (see Appendix) but has worked. The important thing is to make sure that the date, responsibilities, end product, fee, and payment structure are set forth in the agreement. Some agencies require ULI to sign their standard governmental contracts including the TAP agreement as an addendum. Please be sure to review any agreements prior to signing. One thing to note is that the final report is still property of ULI and may be used at our discretion – unless agreed upon otherwise.

### **Payment**

Payment is made to the ULI Baltimore. Typically, some portion of TAP costs are paid 2-3 weeks in advance of the TAP to cover ULI costs. Fees are typically paid in full prior to Day One of the TAP. If agreed in advance, ULI Baltimore may wait to invoice the sponsor for the entire remainder of TAP costs at the time the final report is completed.

## **Roles and Responsibilities**

It is important to outline the roles and responsibilities of ULI and the sponsor up front at the initial meetings and also to include responsibilities in writing in the agreement. ULI Baltimore has divided roles and responsibilities in the following way:

### **ULI BALTIMORE**

#### **I. Pre-Panel (4-8 weeks)**

- Work with sponsor to define expectations, shape questions, prepare for panel
- Develop agenda for TAP
- Work with sponsor to identify expertise needed to complete assignment
- Confirm panelists and communicate roles and responsibilities

#### **II. On-Site (2 days)**

- Work with sponsor to ensure tour and on-site logistics are complete
- Staff TAP with help of moderator and sponsor
- Write notes on panel deliberations and help prepare presentation to sponsor

#### **III. Post Panel (6-8 weeks)**

- Write panel report, obtaining input from panel and sponsor
- Issue final report within 8 weeks of completion of the TAP.

#### **IV. Sponsor Follow up (6-12 months)**

- Sponsor follow up working session with sponsor, ULI staff and TAP Chair
- Sponsor follow up presentation coordination

### **SPONSOR**

#### **I. Pre-Panel (4-8 weeks)**

- Reserve meeting space for the panel and space for public engagement. Public space should be large enough to accommodate fifteen people at one table as well provide space for break out sessions. Public space should accommodate a projector screen and audio-visual equipment. All meeting rooms should be wifi-enabled (with access for TAP Panelists).
- Compile briefing materials and mail one copy to each panel member and two copies to ULI Baltimore at least 14 days prior to the panel. Please see Briefing Book Guidelines for further information. This is the most essential piece to the success of the panel and the most time intensive responsibility of the sponsor.
- Coordinate sponsor briefing and roundtable discussions. This includes identifying and inviting presenters and participants, as well as identifying space for the roundtables to take place. Sponsor may also choose to provide drinks and hors d'oeuvres.
- Plan a bus / walking tour of the study area. Identify members of the sponsor team who will act as the tour guide. If needed, provide transportation to accommodate 15 to 25 people from ULI Baltimore as well as tour guides and others from Sponsor team.
- Coordinate who will attend final presentation. This includes identifying and inviting attendees for the 5:00 pm presentation on Day 2.

#### **II. On-Site (2 days)**

- Provide breakfast and lunch for the panel on both days..
  - Provide staff person to be on call throughout the panel
  - Provide aerial maps of the study area and have the flexibility to produce aerials of specific nodes at the panel's request.
  - Typically, TAP public engagement includes snacks and beverages.
- III. **Post-Panel (6-8 weeks)**
- Review draft report prior to publication.
  - Working session with ULI to obtain feedback, share sponsor recommendations, and identify ULI support expectations and prepare implementation plan
- IV. **Sponsor Follow up Presentation (6-12 months)**
- Sponsor led presentation on implementation, follow ups, successes/failures and confirmation of ULI support needs

## IV. Planning for and Facilitating the TAP

### Panel Recruitment

Each panel should have eight to ten panel members and no more than twelve should serve on any panel. Too small of a group and you will not have all points covered, too large of a group and it is too difficult to manage and members will walk away not feeling as though they made a meaningful contribution. In addition to a chair and a young leader, the panel should be comprised of at least one developer, a market analyst, an urban designer, and a member of the public sector or a nonprofit organization. After that the makeup will depend upon the nature of the assignment. Work with the chair and committee liaison to determine the appropriate mix of expertise.

Panelists should be invited to participate on the panel ideally six weeks in advance of the TAP. Invitations are generally sent via email with a formal note explaining the program and the TAP with the agenda, background statement and questions attached. Follow-up phone calls should be made within a few days of the invitation. The chair and committee liaison can also play a role in inviting the member if they have a personal relationship.

Once a panel member has accepted, an email is sent thanking them for agreeing to participate, requesting their bio, and informing them of when they will receive briefing materials and a logistics packet.

### Logistics

While it is the responsibility of the sponsor to secure meeting space, as well as food and beverage while the panel is on site, it is the role of staff to make sure that it is taken care of. It may be necessary for staff to visit the prospective meeting space in advance of the panel to help the sponsor make appropriate arrangements.

Meeting space should be secured as follows:

Pre-Meeting This meeting should be scheduled prior to the first day of the Tap. Key team members from the sponsor, ULI staff and TAP Chair should be present. Goal is to confirm plan and ensure all information and logistics are ready.

Site Tour Transportation. While the study area may be walkable, it is important for the panel to tour the immediate surrounding area as well as nearby projects of influence to get an idea of the context within which they are working. A bus that can accommodate the panel and ULI staff as well as the sponsor team should be secured. While not always feasible, if microphone capability is available take advantage of it because it can be difficult to hear tour guides on the bus. A walking tour is fine if the panel can accomplish everything by foot, but will likely only be appropriate for small communities.

Meeting Space - Day 1. Public engagement space to accommodate the panel and stakeholders for the briefing and the roundtable discussions will be needed for Day 1.

**Meeting Space - Day 2. The space will be needed to accommodate the panel at one large table / set of tables for general discussions. Breakout space within the room or nearby is also necessary. Space must also be secured for the final presentation. This may be the same room that the panel used to meet for the day or a nearby space. Verify in advance whether the room has internet access for the panel's use.**

Tour Guide. It is important for the sponsor to predetermine a tour route and tour guides in advance of the panel. The sponsor should time the tour in advance taking into consideration time for Q&A so that the panel remains on schedule.

**Meals.** Meal costs are typically included in the TAP fees. ULI will work with the sponsor to find nearby venues or caterers. Breakfast is typically a light continental offering. Lunch is typically a prepared box lunch or sandwich tray. A light snack at mid-day and cases of water on hand as well. ULI Baltimore organizes the dinner on Day 1. This should be held in a nice restaurant with a private room if possible. Panel members have whatever they want to eat and drink; as this is one of the ways to thank the panel for volunteering their time and expertise.

### **Role of Staff**

The role of ULI Baltimore staff in the TAP is to help facilitate the panel process and make sure that an end product is produced.

Logistics Packet. Before the panel even arrives on site, they should have received a logistics packet from ULI staff. Packets should be mailed in a ULI Baltimore folder at least one week prior to the panel. The sponsor should also receive this information. Logistics packets should include the following:

- Memo on Letterhead thanking the panel, stating the date, time and location of the panel and identifying materials in the packet
- Agenda
- Maps / Directions
- Background State and Questions
- Panelist Contact Information
- Panelist Bios

- Stakeholder List – who the panel will meet with during the course of the panel
- Sample TAP Report – make copies from a previous report.
- Any additional information (e.g. recent news articles)

Introductions. The first role of staff is to make sure that everyone arrives on time for the panel and to be the point person for when panel members arrive. The staff, along with the chair and committee liaison, are typically the only people who know the sponsor so it is important to initiate introductions so that everyone gets to know each other.

Bus Tour and Sponsor Briefing. Throughout the tour and the briefing it is the role of staff to take detailed notes and photographs, which will be helpful in writing the report. Photos of the study area as well as the interaction of panel members should be captured.

Roundtable Discussions. At either the beginning of the roundtable discussions, the sponsor briefing, or both, depending upon the group, ULI staff provides a short introduction to all present on who ULI is, what the TAP process is, and what the panel plans to accomplish. It is important that the panel introduces themselves again if necessary. A chair may also play this role if comfortable.

The roundtable discussions are very casual and can at times seem disorganized. For between an hour and one and one-half hours the panel should split up and meet with the various stakeholders in the format of roundtable discussions to get to know who the stakeholders are, what their role is in the project / study area, and learn what they see as the prime issues and opportunities for the area. Staff should help organize the table formations on site and facilitate a switch half-way through if necessary.

At end of the 2<sup>nd</sup> day, a public engagement session typically occurs, wherein the larger set of vested stakeholders are invited to participate. During public engagement roundtables, ULI Baltimore has always had the stakeholders stay put and panel members shift among groups. Staff should not participate in the roundtables as a panel member, but should feel free to sit in on any number of table discussions to understand the direction of the conversation.

Day 2 Deliberations. On the second day, ULI staff should arrive early to make sure that the room is set for the panel. Art / drawing supplies should be brought from the office for the planning and design team as well as notepaper, pens, and any relevant information. ULI staff should also bring large notepads for group note taking.

During the panel discussions it will be important for the staff to keep the progress going by keeping an eye on the clock. Staff should be the key note taker, using an easel and large notepad.

While the role of ULI staff is not to act as a panel member and provide too many of their own ideas and viewpoints, staff should feel free to help facilitate the discussion by asking probing questions for the panel to respond to. During breakout sessions, staff should use the Young Leaders Group panel member to share the note taking responsibilities.

Staff is also responsible for putting together the final PowerPoint. While a shell should be prepared in advance of the panel that includes background information on ULI, the TAP program and the specific panel, key recommendations will have to be input into the document prior to the presentation. Renderings that are

drawn on site should also be photographed, uploaded into the computer and input into the PowerPoint presentation. ULI staff should make sure that a camera and transfer cord as well as an LCD projector are brought to each panel. The sponsor should provide the screen or a large white wall to view the PowerPoint.

Final Presentation. The chair will lead the final presentation along with some or all of the panel members. ULI staff typically provides the introduction (similar to Day 1) to inform attendees of who ULI is, what the TAP program is all about and why ULI spent time on the TAP. A copy of the final presentation should be given the sponsor on a USB drive prior to leaving for the evening. Email the PowerPoint the following day is also acceptable.

After the TAP. An email to the entire panel should be sent the day following the TAP thanking all panel members for their time and explaining that they will see a draft of the report in the weeks to come. A similar email should be sent to sponsor outlining the next steps.

## V. Responsibilities of Panel Members

1. To be objective – Panelists must not have a conflict of interest in the study area. Prospective panelists should be vetted with the sponsor first.
2. Relevant Expertise – make sure they can contribute
3. Provide bio prior to panel – staff needs to have this in advance for report writing.
4. Read briefing materials prior to arrival on site – impress this upon them
5. Bring relevant project information or data if able – if market analysts can pull data from Claritas or if designers have images from previous projects
6. Attend the entire Panel – No meetings, no coming late
7. Respect the Process
8. Participate Fully
9. Review draft report in a timely manner
10. Do not solicit the sponsor for follow-up work after the panel – this is not a marketing opportunity, but rather an opportunity to give back.
11. The sponsor may solicit panelists – ULI Baltimore has never had a problem with panel members charging for follow-up work / advice so long as the sponsor comes to the panel member and not the other way around.
12. No obligation to provide further volunteer advice to the sponsor – Panelists should not feel as though they should give any additional time to the sponsor

## VI. Responsibilities of the Chair

1. Attend preliminary meetings with the sponsor to discuss the scope and questions for the panel.
2. Work with staff and chairs of committee to help determine list of prospective panelists.
3. Provide introductions on Day 1 of the Panel to the sponsor and gathered stakeholders.
4. Moderate discussion at dinner / begin to bring panel together as a team / set agenda for Day 2.
5. Moderate discussions on Day 2.
6. Keep panel focused and on track throughout the course of the panel.
7. Ensure that all panelists have ample opportunity to share their viewpoints and provide recommendations. Do not let any one panelist overpower the conversation.
8. Make sure that all questions have been addressed.

9. Introduce the panel at the final presentation and present findings if needed.
10. Review draft report and provide comments.
11. Be available for a follow-up presentation to the sponsor or elected officials if requested.

## VII.TAP Reports

While each District Council produces a different end product, ULI Baltimore has taken the approach to prepare an abbreviated version of the reports delivered after a national advisory services panel. Typical reports are approximately 30 pages in length and include text, renderings completed on site, photographs taken of the study area, and the panel members' bios. TAP reports are the product of the Urban Land Institute, not the Sponsor.

### **Timing**

The final report should be completed within six to eight weeks of the panel.

Draft Report – Within Three Weeks. A draft report should be completed by staff and emailed to the panel within three weeks of the TAP to ensure that all panel members still clearly remember the recommendations that were given during the two day process. The report does not have to be in final format, nor does it need to include all photos, but renderings completed on site and referenced in the text should be included or attached separately so that panel members may refer to them during their review.

Panel Review – Weeks Four to Five. When sending the report, please tell the panel to review the report for substantive changes. The panelists should have the liberty to add, change or delete sections to present the most accurate explanation of the recommendations. This is also an opportunity for the report writer to ask for clarification on recommendations that were not fully explained during the panel.

Given the fact that the report will be amended to reflect the panelists' changes, it is not efficient to do a thorough edit prior to sending it on to the panel. Please remind the panelists of this so that they do not spend additional time on grammatical edits.

Panelists should be reminded that the report represents the panel's opinion and therefore additional recommendations that were not vetted during the TAP should not be added at this time.

While all panelists should provide comments on the report, it is unlikely that you will get substantive feedback from everyone. It is most important to make sure that the chair has provided feedback. One week is generally given to review the report, but it often takes longer than that to receive all comments.

Sponsor Review Weeks Five - Six. After the panel has signed off on the draft report and all changes have been incorporated, send the draft report on to the sponsor. Similar to the panelist instructions, remind the sponsor that the report has not been edited, but will be thoroughly reviewed prior to print.

The sponsor should take the time to review the draft to make sure that 1) all names / titles / towns / streets / etc. are correct; 2) they clearly understand the recommendations the way they were written in the report; and 3) there are no inaccuracies.

To make it easier to finalize the report, request that regardless of how many people review the report that all comments are integrated into one draft – preferably through Microsoft Word’s Track Changes program – prior to sending it back. One week is generally given for this review, but it may take longer. At this point, the push to get the final report completed is driven by the response time of the sponsor.

Final Report – Weeks Six to Eight. Once comments are received from the sponsor and integrated into the report, the report is ready for a final edit. While staff should do a thorough review of the final report, it is always a good idea to have the report edited by a third party. Whether an editor is hired or a colleague reviews the report is up to the district council.

Once the report is edited, it should be formatted to include renderings and photos. Please see ULI’s style guide for additional instructions on fonts, colors and format. ULI may have to review the report prior to sending it to print.

### **Format**

ULI Baltimore follows the model of the national advisory services panel reports and in addition to the front matter, divides the report into the following sections:

- Acknowledgements
- Panel and Project Staff
- Foreword: Overview and Panel Assignment
- Executive Summary
- Market Potential
- Development Strategies
- Planning and Design
- Implementation
- Conclusion
- Appendix
- Panel Bios

For additional information on formatting the reports, please review past reports, which are available on ULI Baltimore’s website: [Baltimore.uli.org](http://Baltimore.uli.org).

### **Writing the Report**

The PowerPoint presentation developed during the TAP and presented to the sponsor on Day 2 is often a good template for writing the final report. Dropping the text of the slides into the report can be an easy way to help develop the outline for the report.

While it is the staff’s responsibility to write the report, do not hesitate to have panelists fill in “holes” during their review. The sponsor may also have to help with the Acknowledgements to ensure that all those who participated are recognized appropriately. ULI Baltimore has hired an editor for a number of past reports with mixed results. If there is a ULI-trained editor that we can contract with, it would be a good idea.

### **Printing the Report**

ULI Baltimore will direct the printing and production of the TAP reports. Printing is included in the cost of the TAP. If the Sponsor requests additional copies, such costs are specific to that TAP Report. Typically, One reproducible digital copy and 30 hard copies are produced. Ten copies are delivered to the sponsor, a copy

is sent to each panel member, and the remaining copies are kept on file to use for marketing. An electronic version of the final report is also sent to sponsor in a pdf file. A pdf version of the report is also posted to the website. Some additional printing associated with promotion or background information may be in addition to ULI TAP costs and responsibilities.

### **Website**

Final reports should be posted to websites (Baltimore.uli.org and Sponsor) and sent electronically to the sponsor.

### **Sending Reports to the Panelists**

After each panel, panelists are e-mailed a copy of the final report, a thank you note and a “token of our appreciation”. ULI Baltimore will coordinate Thank You token production and costs.

## **VIII. Marketing and Communications**

### **Marketing Materials**

Each prospective TAP sponsors should receive a packet of information that includes the following:

1. TAP Program Brochure
2. TAP Guidelines
3. Sample Agenda
4. Roles & Responsibilities
5. Sample Briefing Book Guidelines
6. Application
7. Listing of TAPs completed by ULI Baltimore
8. Sample Report

All materials can be downloaded off of ULI Baltimore’s website: Baltimore.uli.org.

### **Website**

The TAP section on the website should include all marketing materials and should have all of ULI Baltimore’s TAP reports available for download. Baltimore.uli.org.

### **Newsletters**

ULI Baltimore’s newsletters should include summaries of recent TAPs. ULI staff has traditionally written these articles.

### **Word of Mouth**

ULI Baltimore’s most successful way of getting new TAPs is by word of mouth. Whether it through a past panelist or a committee member, ULI staff is generally contacted based on a referral.

## **IX. TAP Expenses**

*All costs are approximate*

TAP Costs are determined by ULI. TAP costs can be highly variable based on the unique requirements of each TAP activity. A \$25,000 set fee is established for a typical TAP that last (up to 2 days). TAPs that are

larger, more complex, and/or require more time, will require added fees. All fees will be agreed by the Sponsor and ULI Baltimore in advance to TAP planning.

Fees are typically paid in full prior to Day One of the TAP. The ULI Baltimore District has the discretion to determine whether to accept a Pro-Bono TAP.

**TYPICAL 2-DAY, SINGLE-PROPERTY TAP COST BREAKDOWN**

Staff Time – Up to 80 hours		\$ 3,000 - \$ 5,500
<ul style="list-style-type: none"> <li>• Meeting, planning for and staffing the TAP</li> <li>• Writing, reviewing, formatting the report</li> </ul>		
Food		
+ Panel Prep Dinner		\$ 500
+ Panel Dinner (varies) (one)		\$ 2,000
+ Breakfast, Lunch and Snacks (two)		\$ 1,500
Technical TAP Report Writer		\$ 3,500
Printing		\$ 500
Thank you gifts		\$ 500
Travel & Lodging (Optional)		\$ 600
Facility Costs (Venue Costs)		\$ 1,000
Bus Rental Costs (Tour, 1-day)		\$ 600
Miscellaneous Expenses		\$ 500
Graphic Layout & Design of Final TAP Report		\$ 1,200
<b>Direct TAP Costs Subtotal</b>		<b>\$17,000 to \$18,000</b>

**ULI District Fee/Honoraria (10%-20% of expenses, typical) \$ 2,000 to \$ 3,700**

**OVERALL ULI BALTIMORE DISTRICT TAP SPONSOR COSTS**  
**\$ 20,000 to \$25,000**

## Appendix A – Timeline

- Initial meeting between sponsor & ULI
- Execution of contract
- Planning meeting with
  - a. TAP Chair
  - b. Sponsor Lead
  - c. ULI Staff
  
- Sponsor identifies tap questions
- Identify panelist by ULI Regionalism Committee
- Briefing booklet sent to panelist & first payment to ULI
- TAP event & second payment to ULI
- TAP Report
- TAP follow up meeting approximately 1 month after
  - Feedback is given
  - Recommendations on action plan
  - How can ULI help
- Sponsor presents follow up at 6-12 months

## Appendix B – Sample Agreement

The Baltimore District Council of the Urban Land Institute would like to thank the **[SPONSOR]** for agreeing to sponsor a Technical Assistance Panel (TAP) on **[estimated TAP DATES]** to **PROJECT DESCRIPTION (Example: evaluate development opportunities for key parcels of land near the XXX Metro Station)**. Following is the scope of work, deliverables and associated costs for the one and one-half day TAP. Should the contents of this letter be consistent with your expectations, please return a signed copy to ULI Baltimore at your earliest convenience.

### SCOPE OF WORK

#### ULI BALTIMORE

##### V. Pre-Panel (4-8 weeks)

- Work with the sponsors to define expectations, shape questions, and prepare for panel
- Work with the sponsors to develop the agenda for the TAP
- Work with sponsors to identify expertise needed to complete assignment
- Confirm panelists and communicate roles and responsibilities

##### VI. On-Site (2- days)

- Work with sponsor to ensure tour and on-site logistics are complete
- Staff TAP with help of chair and sponsors
- Take notes on panel deliberations and help prepare presentation to sponsors

##### VII. Post Panel (6-8 weeks)

- Write ULI TAP panel report, obtaining input from panel and sponsors
- Issue final ULI TAP report within 8 weeks of completion of the TAP

#### [SPONSOR NAME]

- Reserve meeting space for the panel. Room should be large enough to accommodate fifteen people at one table as well provide space for break out sessions.
- Reserve meeting space for the sponsor briefing and final presentation. Size of room depends upon how many people are invited to each session.
- Provide transportation for site tour to accommodate 15 people from ULI Baltimore as well as tour guides and others from Sponsor team.
- Compile briefing materials and mail one copy to each panel member and two copies to ULI Baltimore at least two weeks prior to the panel.
- Provide aerial maps of the study area and have the flexibility to produce additional at the panel's request.
- Lead the coordination of the sponsor briefing. This includes identifying, inviting and confirming key participants, as well as preparing them for nature of the event.
- Review draft report for accuracy prior to publication.

**DELIVERABLES:**

- Within eight weeks after the TAP has been completed, a written report, summarizing the panels' comments and recommendations, will be provided to each sponsor in electronic format (pdf file) and 10 hard copies.
- Within 6-12 months, sponsor will present as a follow up to the TAP, their status regarding the implementation plan.

**FEE FOR SERVICES:**

- ULI Baltimore charges a **\$25,000** Lump Sum fee to cover ULI Baltimore District costs and materials required for Technical Assistance Panels. Panel members volunteer their time and services at no cost. The **[SPONSOR NAME]** is required to cover all logistical costs (promotions, added copying, meeting room, supplies, etc.) and the costs associated with assembling relevant information about the assignment and issues under consideration.
- Payment for the panel is due as follows:
  - 25% Within three weeks prior to the agreed upon Date of the TAP event.
  - 75% Due the day before the TAP event.

**ALTERNATE PAYMENT SCHEDULE**

- 25% Within three weeks prior to the agreed upon Date of the TAP event.
- 50% Due the day before the TAP event.
- 25% Payable upon receipt of the final report. An invoice for payment will be submitted with the final report.

\_\_\_\_\_  
[NAME] Date  
ULI Baltimore District Chair

\_\_\_\_\_  
[SPONSOR POC NAME] Date  
[SPONSOR]

\_\_\_\_\_  
[ULI TAP MANAGER NAME] Date  
Chair, ULI Baltimore, [TAP NAME]

\_\_\_\_\_  
ULI Baltimore, Executive Director Date

## Appendix C – Sample Questions

**Considering the challenges and resources of the valley, we are asking ULI to help us answer the following questions:**

- What specific elements impact the short and long term development of the park and surrounding communities?
- Can an organization be created to administer valley resources? What forms can an organization take? How can community input be ensured?
- What should the boundaries of the cultural and environmental impact area be?
- How can the diverse elements of the park be made sustainable? What short and long term strategy would be necessary considering economically, environmentally, and culturally elements?
- What specific design elements would enable the strategies outlined above?
- What financial resources may be available to implement the strategies?
- What should be done to more closely connect the river communities to the valley?

# Appendix D – Sample Briefing Document

Appendix E – Sample TAP Agenda  
(Prepared by District Council Staff)

**Day One**

- 8:00 am** Welcome and Introductions – Light Breakfast- TAP Panel Venue near or within TAP study area
- 9:00 am** TAP Study Area Tour and surroundings
- 12:00 pm** Lunch
- 1:00 pm** Interview/Meeting with Stakeholders & Sponsor
- 5 - 6:30 pm** Public Engagement in Public Engagement Space (case-specific)
- 7:30 pm** Panel Debriefing Dinner – Venue case-specific

**Day Two**

- 8:00 am** TAP Panel Work session/Q&A- Breakfast
- 10:30 am** Sponsor invited for interactive session. (Including discussion of TAP Follow-up schedule).
- 12:00 pm** Working Lunch – Sponsor typically does not attend.
- 1:00 pm** TAP Panel working on questions, prepare PowerPoint presentation for public TAP presentation, dry run with TAP panelists
- 5:00 pm** TAP Findings Public presentation – Public Engagement Space

## Appendix F – Sample Power Point Presentation Flow

- Title Page
- ULI Overview
- TAP Members (Sponsor Chair & Members)
- Background Info- Briefing booklet, overview of questions
- Day One Recap
  - Site Tour
  - Work Session
  - Stakeholder/Community Meeting
- Day Two Recap
  - Findings
  - Opportunities & Challenges
  - Conclusions
  - Recommendations
  - Analysis
  - Guidance
- Q&A

# Appendix G – Sample Report