



San Francisco

ULI SF TECHNICAL ASSISTANCE PANELS (TAPs)

TAPs Description and Process

OBJECTIVE + HISTORY:

Since 1947, the Urban Land Institute (ULI) has harnessed the technical expertise of its members to help communities solve difficult land use, development, and redevelopment challenges. ULI has conducted over 650 Advisory Services Panels in 47 U.S. states, 12 countries, and 4 continents. Since 2006, ULI San Francisco (ULI SF) has adapted this model to provide [Technical Assistance Panels \(TAPs\)](#) for use at the local level, assisting over 30 cities throughout the San Francisco Bay Area.

ULI San Francisco TAPs provide expert, multidisciplinary advice to public agencies and nonprofit organizations facing complex land use and real estate issues in the Bay Area. Drawing from our extensive membership base, ULI SF panels offer objective and responsible advice on a wide variety of land use and real estate issues ranging from site-specific projects to public policy questions.

TAPs PROGRAM DESCRIPTION:

ULI SF conducts two types of TAPs. Both versions commence with a set of questions proposed by the sponsoring organization (the 'Client') – a public agency, nonprofit organization, or nonprofit developer – about a specific development issue or policy barrier within a defined geographic area. The first TAP model is a two-day commitment, which includes a site visit, Client and stakeholder interviews, intensive working sessions, a presentation of recommendations, and a final report outlining the process and recommendations. The second model is a one-day commitment, which includes a brief introduction and overview by the Client, an approximately 4-hour working session with the panelists, followed by a presentation of recommendations to the Client, and a concise memo outlining the recommendations.

ULI San Francisco assembles a multidisciplinary panel of experts that explore the project, interview stakeholders, and make recommendations. TAP Panelists consists of unpaid volunteers from the 2,300+ ULI members in the San Francisco District Council chosen specifically for each assignment. Depending on the issues being tackled, panel member expertise may be comprised of developers and owners, investors, designers, planners, engineers, market, and financial analysts, as well as members of the public sector. The strength of ULI San Francisco's Technical Assistance Panels lies in the cross-section of experts, who don't have a vested interest in the project, examining the issues from multiple angles and producing recommendations and/or an implementation strategy that is based on sound information, community realities, and best practices.

Where appropriate and beneficial to the Client, ULI San Francisco will partner with other organizations to extend the breadth and expertise of the panel.

COST:

ULI San Francisco charges a fee for each of its panels to cover associated costs and staff time. Clients are charged a fee of \$30,000 for a two-day TAP and \$17,500-\$20,000 for a one-day TAP, depending on the type and extent of the written report or memo. Panel members are ULI experts who volunteer their time because of a commitment to the ULI mission. Client expectations and obligations, including those for expenses, are detailed below.

TIMEFRAME:

After completing a TAP application, members of the TAPs Committee and ULI staff will arrange an initial meeting to understand and refine the assignment objectives as well as identify key issues. Decisions on

whether the committee can accept the panel assignment will be determined shortly after receiving the application and the initial meeting. Three to four months are needed to provide sufficient time to assemble the best available TAP panel members, compile briefing materials, and plan for the TAP. Following the TAP panel presentation, we will commence writing the final report, which will be delivered to the Client within 2 months after the TAP workshop.

Client Obligations

- **Briefing Book:** The Client is responsible for assembling all relevant background information relating to the issues being addressed into a comprehensive Briefing Book. ULI Staff will provide the Client with a template and examples of other Briefing Books for reference. Ten bound copies and one PDF (to be emailed) of the Briefing Book should be finalized and mailed to ULI SF staff at least 4 weeks before the scheduled Panel. ULI SF staff will distribute the books to all the panelists.
- **Stakeholder List:** The Client must prepare a list of stakeholders available on the day of the TAP. The list should include key members of the private sector, public sector, and community who might provide valuable insight and information to the panel.
- **Stakeholder Interview Schedule:** The Client is responsible for coordinating and scheduling the stakeholder interviews for the morning session of day one. The Client and ULI staff will work together to determine the exact timing and length of the interviews.
- **Project/Area Tour & Transportation:** If the TAP scope deals with a specific project or project area, the Client is responsible for arranging a tour of the project or site area. The Client must arrange for transportation and an accompanying staff person to guide the tour and answer panel questions. It is ideal but not critical that transportation for group activities such as the site or area tour, are provided in one City vehicle, which can accommodate approximately 12 people. (TAP Panelists and ULI staff are responsible for their own transportation to the TAP panel location and the City will not incur those travel costs.)
- **Other Resource Materials:** Additional resource material that is not appropriate or too bulky for inclusion in the panel Briefing Books should be made available to the panelists during the TAP workshop. Such information might include zoning and general plan materials, market data, economic studies and projections, large format maps and other similar materials as needed. ULI SF staff and the Client will determine prior to the panel session what materials might be helpful for the panel deliberations.
- **Panel Meeting Room(s):** The Client is responsible for providing conference room(s) for:
 - TAP panel workshop and deliberations - room should be large enough to accommodate 12 people at one table as well as provide space for breakout sessions. Internet access is critical.
 - Stakeholder interviews (several rooms) - room size depends on how many people will be interviewed.
 - Final TAP panel presentation - room should be set up in a manner consistent with the type of final presentation desired and the amount of audience participation desired and include the ability to show a PPT presentation. This is often done in Council Chambers.
- **Food and Refreshments:** The client is responsible for providing food and refreshments throughout the TAP workshop for TAP panelists and ULI staff. This typically includes coffee and water throughout the day, light breakfast on both days, lunch on both days, and dinner at the end of the first day for TAP panelists, ULI staff, and invited City staff.
- **Lodging:** Depending on the location of the TAP scope location, the Client may be responsible for providing accommodations for the TAP panelists and ULI staff for two nights.

We encourage you to consider a TAP for your community. If you have further questions, please contact Teresa Breaux, ULI SF Manager, at +1-628-400-8956.

Please submit applications to: [Teresa Breaux](#)

Technical Assistance Panels (TAPs) Program Application

Please submit applications to: teresa.breaux@uli.org.

Applications will be reviewed by our Technical Assistance Panels Committee on an on-going basis.

1. TAPs applications must meet the following criteria: A clearly defined scope of work, and three to four well-articulated questions to be addressed during a one-day or two-day session.
2. A clearly defined geographic boundary (a neighborhood, district, corridor, etc.).
3. Strong local leadership capacity, by abiding by the program's terms and conditions and Client Obligations; respect TAPs findings by galvanizing community support; and demonstrate a sincere attempt to implement recommendations.

Please provide the following information:

Lead Applicant Organization: _____

Contact Person: _____ Title/Role: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone Number: _____

E-mail: _____

Please attach the following:

SCOPE OF WORK

Provide a one-page description of the need for the Technical Assistance Panel. Include background information on the affected site or area and current and future plans or activities (both public and private). Maps, statistics, planning and development goals, and other information may be attached if relevant. Provide an explanation of previous efforts to address the scope of work, including outcomes of those efforts.

QUESTIONS FOR THE EXPERT PANEL

Provide three or four specific questions about the affected site or area for the panel to address.

LEADERSHIP SUPPORT

Provide a letter from the municipality in support of the TAP process agreement with the criteria outlined in this application. Letters of support from local businesses and/or community-based organizations are encouraged but are not required.