



WHERE THE FUTURE IS BUILT

ULI Atlanta Strategic Plan 2023-2026

Shaping the future of the built environment for transformative impact worldwide. ULI's mission is at work in Atlanta through its 1,400+ members—real estate professionals from across the land use industry. Informed by data gathered from those same ULI members, ULI Atlanta's Advisory Board is shaping the future of ULI across the State of Georgia, laying the groundwork for the next three years of ULI's work in the state.



ULI's Mission Commitments

CONNECT active, passionate, diverse members through the foremost global network of interdisciplinary professionals

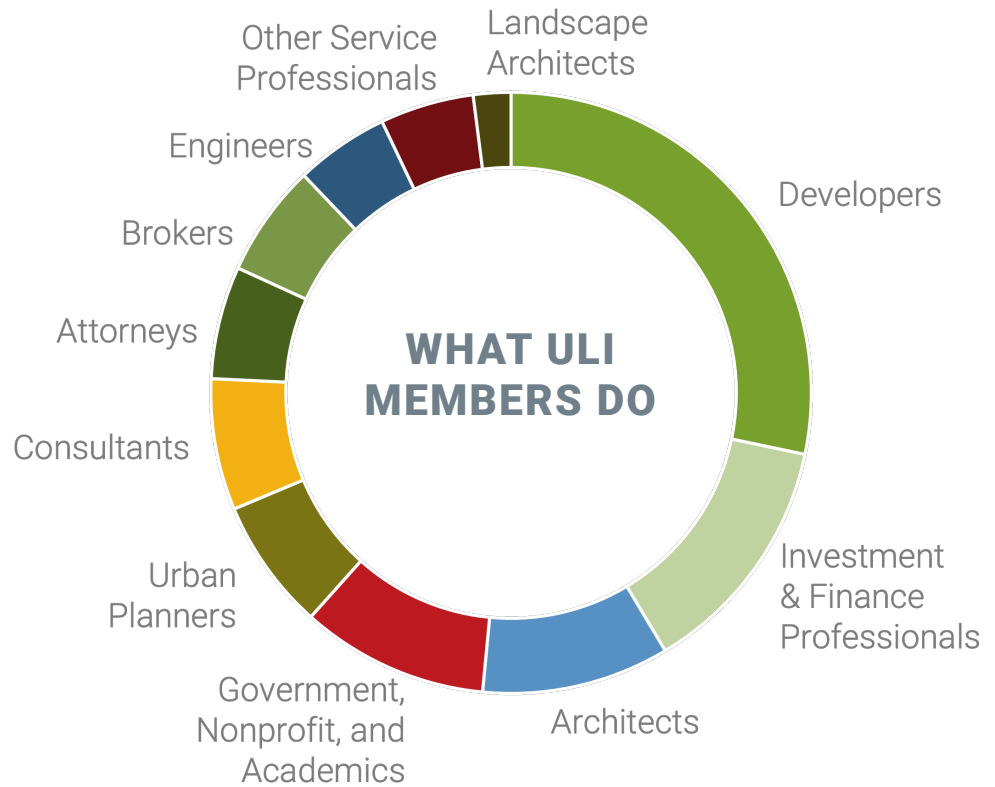
INSPIRE best practices for equitable and sustainable land use through content, education, convening, mentoring, and knowledge sharing

LEAD in solving community and real estate challenges through applied collective global experience and philanthropic engagement

Who is ULI Atlanta?

Member Profiles

ULI members represent the full array of professionals comprising the full spectrum of real estate development and land use industries.



Global Mission Priorities

1

Increasing Housing Attainability in Communities Around the World

2

Decarbonization and Net Zero

3

Educating the Next Generation of Diverse Real Estate Leaders

All three priorities are underpinned by a commitment to diversity, equity, and inclusion, which recognizes that our communities can be successful and sustainable only if they work for everyone.



45,000+
Members in more than 80 countries



Did you know?

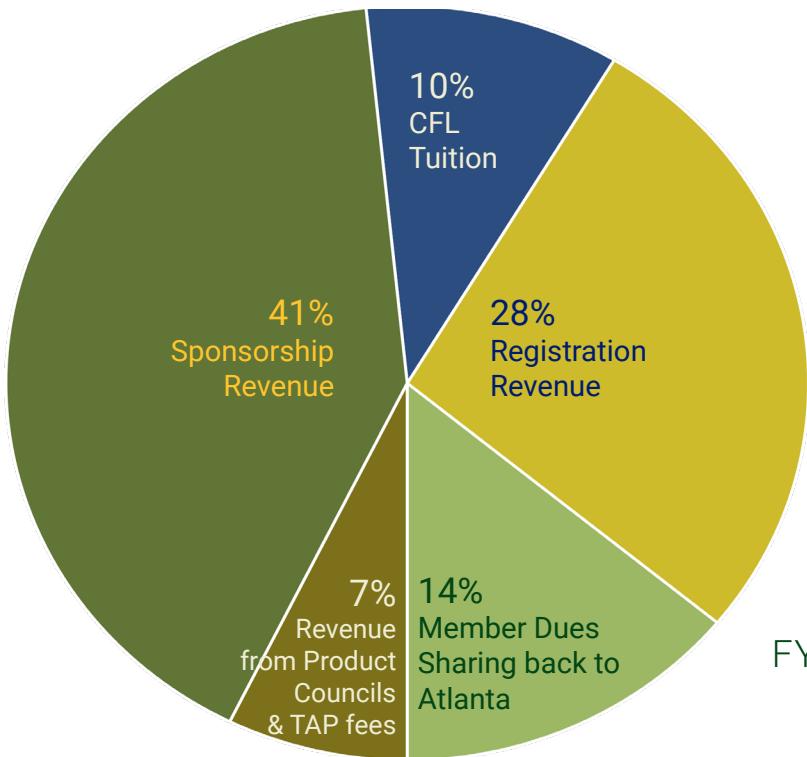
ULI Atlanta includes **1,400+** Members across the state of Georgia and eastern Tennessee

ULI Atlanta Strategic Planning Timeline

2022						2023
July–August	September	October	November	December		January
• Member survey	• Strategic planning board retreat	• Targeted ULI member and committee input	• Synthesize findings and draft report • Craft a draft operational plan to present to ULI Atlanta board	• Present final strategic plan and operational plan to ULI Atlanta Advisory Board		• Finalize plan and implement



ULI Atlanta Financial Resources



Drivers of revenue across district councils

- » Typically, 52% of district council revenue (on average) came from annual sponsorship in FY22
- » 14% of revenue came from event registration fees

FY23 proposed revenue \$1,008,986

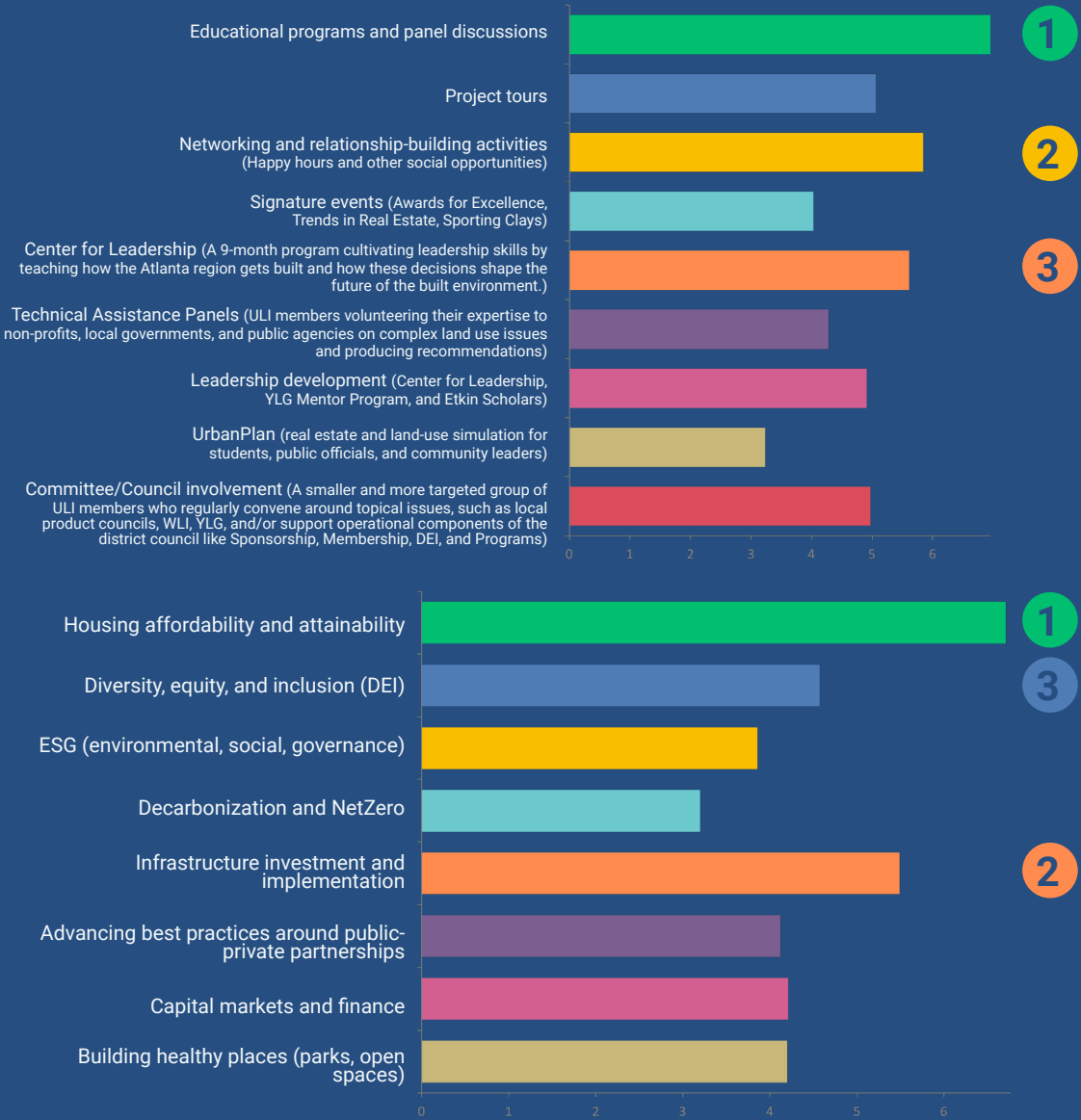
Throughout the summer of 2022, ULI Atlanta surveyed members from across Georgia and eastern Tennessee to gauge their reactions to the following questions. Responses were gathered from 217 individuals of Atlanta’s 1,400 members and those insights will be used to drive programming into 2023 and beyond.

2022 Member Survey

How valuable are ULI’s programs and key initiatives to you, your team, and your company/firm?

30%
of respondents
want to get
more involved

Identify and rank major issues facing the real estate development and land use industries today across the Atlanta region and where ULI Atlanta should be providing thought leadership.



The Advisory Board noted that the priority ranking may be diluted as ESG, decarbonization/NetZero, Building Healthy Places, and the recent Infrastructure Act have many overlapping themes and intertwined threads around the built environment. If combined, ESG may rank higher than a #4 priority.

Key Survey Findings

Most Valuable ULI Initiatives

- 1. Educational programs and panels
- 2. Networking and relationship-building
- 3. Leadership initiatives, esp. Center for Leadership (CFL)

Major Issues Facing Real Estate in the Region

- 1. Housing affordability
- 2. Infrastructure investment and implementation
- 3. Diversity, equity, and inclusion (DEI)
- 4. Environmental, social, and governance (ESG)



Where are we going?

With the member survey responses in hand, ULI Atlanta's Advisory Board met in September 2022 to discuss, plan, and refine the potential path forward for ULI's work in the region.

Strategic Planning Session Focus

1

How do ULI Atlanta's priorities elevate and amplify ULI's global priorities?

Educating Leaders

particularly diverse leaders

- Leverage UrbanPlan – Investment in the industry and people
- Public Officials – Use UrbanPlan to get in front of decision makers
- Partner with other organizations (CREW, GMA) to host UrbanPlan
- Leverage the work of the DEI Committee, which is driven by its own strategic plan
- Successfully grow and scale the Etkin Scholars program locally

Housing Attainability

- Geography – Housing affects every city/community across the state; leverage ULI resources and think differently/more strategically to increase the supply of housing and educate communities in lesser served parts of the state.

Net Zero

- Distill complex information locally by leveraging research at ULI HQ policy centers
- Make the business case for net zero construction practices and products
- CFL will focus on decarbonization
- Need to focus on infrastructure to support housing (utilities, water, broadband, transit)
- Leverage members' interest and expertise in this area to build a roster of member champions and local experts on the issue

2

How will we deliver our mission and make meaningful impact in our community and membership?

- **Do simple better** – ensure all local programming is high quality and impactful
- **Conduct TAPs** to show our expertise and value to local communities, especially on the mission-aligned issues of housing and infrastructure
- On TAPs impact – **Build in a follow-up process** to understand impact
- Communications – **tell ULI's story better**; distill into easy-to-read/skim pieces
- Become our own **ambassadors**
- **Leverage UrbanPlan** for Public Officials and Community Leaders more intentionally
- Consider **service projects** in the community (Habitat for Humanity)
- **Add a local product council** on infrastructure – a key strategic issue where ULI Atlanta could be a regional convener
- **View programming as an actionable tool**, e.g., how does the workforce development challenge impact housing conversations?
- **Measure CFL engagement** in ULI – add exit interview to learn how they want to get involved further
- **Create a challenge initiative** or educational opportunities **for the graduating CFL** in the coming year

3

What should we be doing to increase our impact and add value for members?

- **Education and networking** were seen as a top 3 engagement strategy in the member survey
- Focus on **partnerships** with universities and young leaders to deepen diversity, equity, and inclusion work and create pathways into ULI
- Host more **roundtable discussions** within the industry that are meaningful (housing, zoning, and infrastructure implementation challenges and opportunities)
- Help members **reconnect to ULI** when changing jobs
- Promote a **"plus-one"** guest opportunity to sponsor guest attendee
- **Distill big topics**/reports down to one-pagers; share in a "Did you know?" format
- Provide **express educational services** (xTAP) using TAP knowledge
- **Personally invite developers** to programs to ensure they are in important conversations
- Host specific programs for targeted groups and make them **"can't-miss" events**



With answers to the strategic planning questions in hand, the Advisory Board considered ULI Atlanta's programs and initiatives, sorting each into action categories—explore, expand, sustain, and sunset.

Explore

- Spring Meeting 2026
- Communications plan
- Member recognition and retention strategy
- ULI Foundation engagement and scholarship
- Expand sources of revenue through new types of convenings and sponsorships

Expand

- Annual sponsorship campaign
- Members-only engagements
- Product Councils – Targeted engagement around issues that dive deep and allow for meaningful networking across industries
- TAPs
- UrbanPlan

Sustain

- Awards program
- TAPs outside of the Atlanta region and into the rest of the state
- Etkin Scholars
- CFL (possible alumni board, award category for CFL grad; expand CFL/ member spotlight)
- UrbanPlan (re-envision UP to proactively provide workshops – not just commissions)

Sunset

- Monthly programs – less frequent, higher quality, and impactful programs that are “cannot miss” moments
- Socials (just for the sake of networking)
- Events that are not directly aligned with ULI's mission priorities

Next Steps

The sorted ideas will be refined in the coming weeks via additional engagement with ULI members, committee leaders, and through further insights from the Advisory Board.

The result will assist ULI in knitting together member leadership time, staff time, and financial resources into a path that is more resourceful and impactful for Atlanta.



Housing

- Partner with ULI Terwilliger Center for Housing on TAP with Rabun County
- Hosting signature program on housing in 2023.
- Tour the Cottages on Vaughan, 2022 ULI Jack Kemp Award Winner



Infrastructure Investment

- Investigate launch of fourth Product Council
- Provide technical assistance to City of Alpharetta, Windward Parkway corridor



Diversity, Equity & Inclusion

- Support strong DEI committee with fundraising campaign for local initiatives
- Participate in Etkin Scholars for 2nd year
- Host UrbanPlan for Community Leaders workshop for NPU University
- Seek opportunities for joint programs or roundtables with like-minded organizations



Environmental, Social & Governance

- Partner with ULI's global Net Zero Imperative to better understand real estate's role in decarbonizing the built environment
- Host an ESG day for CFL's 2023 class
- Use ULI national to gather and synthesize information about what other states and municipalities are doing or requiring for building energy performance