



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.



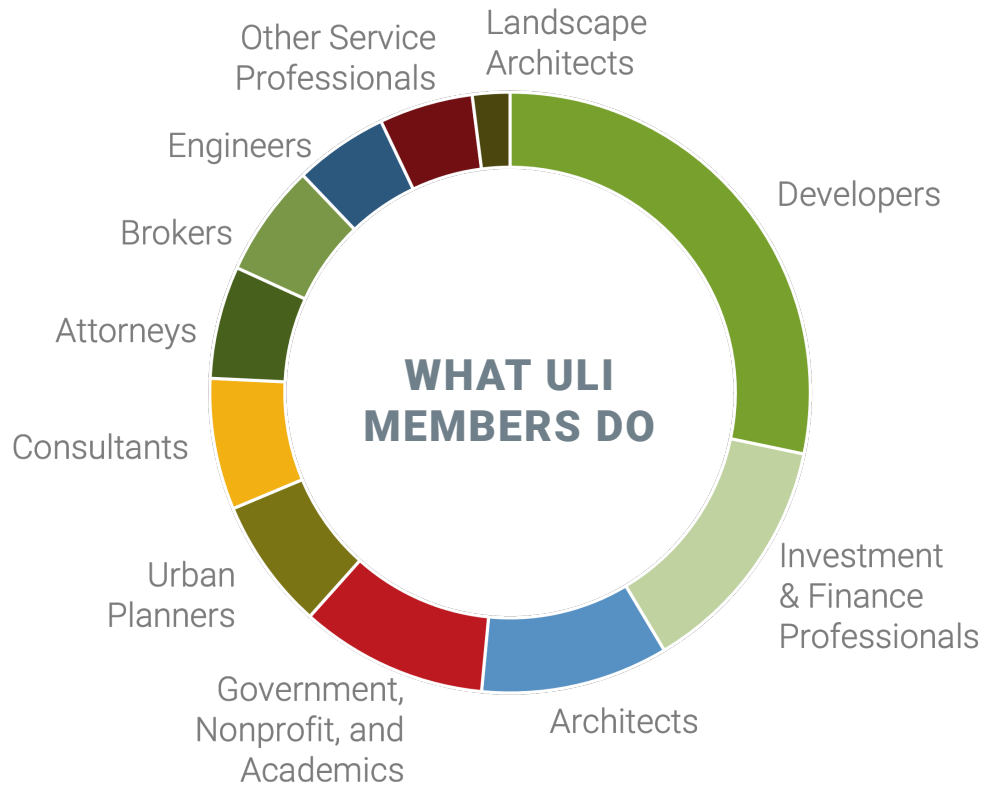
# ULI's Global Mission Priorities

- 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.

# Who is ULI Atlanta? Member Profiles

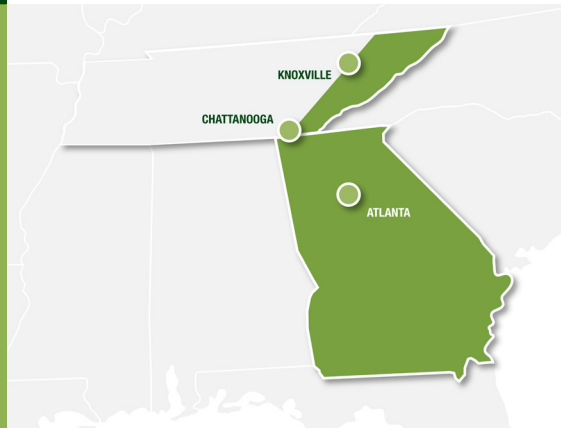
ULI members represent the full array of professionals comprising the full spectrum of real estate development and land use industries.



ULI was founded in 1936



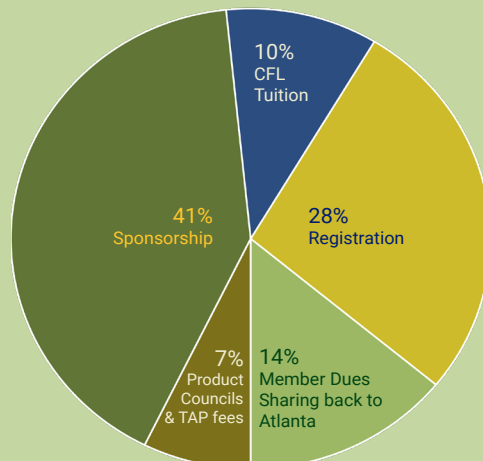
**48,000+**  
Members in more than 80 countries



## Did you know?

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

## ULI Atlanta Financial Resources



## Drivers of district council revenue

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

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.

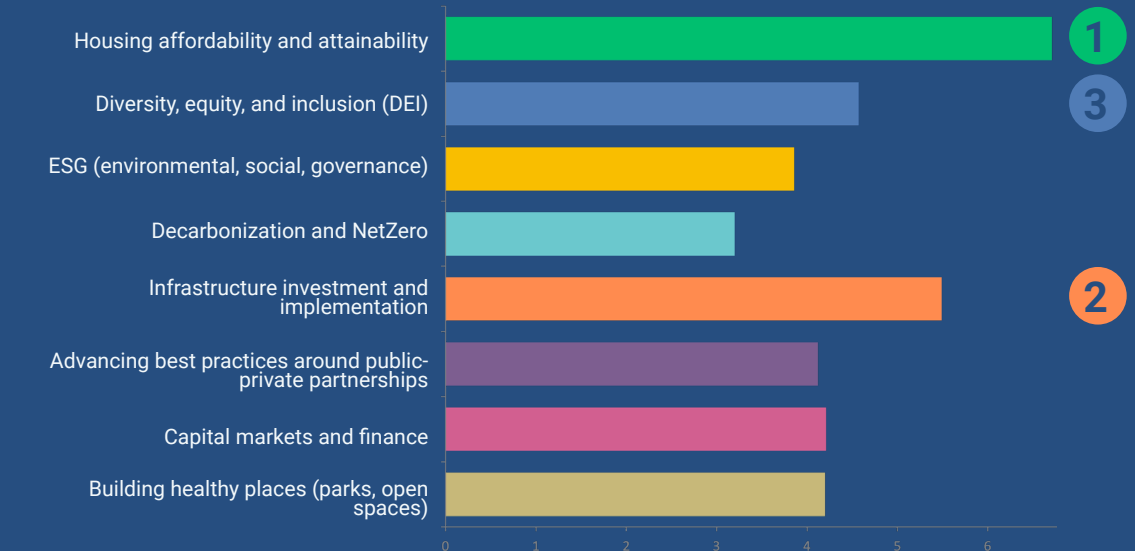
# 2022 Member Survey

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

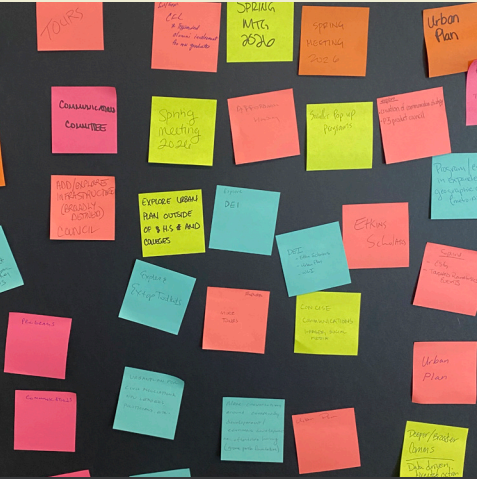
- Annual sponsorship campaign
- Members-only engagements
- Product Councils – Targeted engagement around issues that dive deep and allow for meaningful networking across industries
- TAPs
- UrbanPlan

## 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 (Updated September 2023)

With fulfillment of ULI's global mission priorities at the forefront, ULI Atlanta developed an implementation framework that aligned its core programming needs identified in the member survey with the major focus areas of the Atlanta District Council to map out a plan of execution. These core issues underpin ULI Atlanta's work for 2023 and beyond by leveraging member leadership, member engagement, educational programming, and thought leadership on complex real estate and land use issues.

Each initiative will be evaluated on an annual basis on the degree to which the initiative will drive membership, revenue, and community impact. The ULI Atlanta Executive Director will routinely make an assessment of staff and district council resources required to ensure feasibility.

Through this framework, member leadership can assess how their respective committees are advancing ULI's strategic priorities.





# Advancing Housing Affordability Solutions

## How are we doing?

2023: ✓ Complete ○ In-progress

### GOALS

- Use TAPs and UrbanPlan for Community Leaders to explore more statewide partnerships that bring ULI resources to communities facing unique affordability challenges.
- Evaluate relevance of ULI Atlanta's 2018 housing study and the need for a refresh of data and assumptions for 2023 and beyond.
- Ensure annual programming on housing is done through Programs Committee and CFL.
- Use the Awards for Excellence program to create an awards category that showcases projects which expand housing opportunities, such as those that meet "affordable" and "workforce" housing needs.

### ACTIONS

- ✓ Partnered with ULI Terwilliger Center on a workforce housing study in Rabun County.
- ✓ Partnered with Young Gamechangers to host UrbanPlan in Columbus, GA, to help community leaders better understand development risks and trade-offs and the economics of affordable housing.
- ✓ Engaged KB Advisory Group to refresh ULI Atlanta's 2018 housing study—through a review of new housing, demographic, and spatial data—and develop strategies to advance regional housing goals.
- ✓ Hosted a Housing Innovation Panel where market experts shared insights and innovations from other markets.
- ✓ Hosted a project tour of Cottages on Vaughan, a 2022 Jack Kemp Workforce Housing Award recipient.
- ✓ Created the Excellence in Affordable/Workforce Housing Development category for the 27<sup>th</sup> Awards for Excellence program.
  - Host an Advisory Service Panel with Atlanta Housing to uncover innovative funding mechanisms to close finance gaps for infrastructure investments on publicly-owned land.



# DEI & Educating the Next Generation of Diverse Leaders

### GOALS

- Build on ULI Atlanta's DEI strategic plan to 1) increase diverse representation in ULI membership, leadership, and engaged members; 2) convene conversations on race and real estate that create more equitable outcomes; and 3) through CFL, YLG Mentor program, and Etkin Scholars, create more leadership pathways for students and professionals of color.
- Leverage UrbanPlan as an educational tool for community leaders and students.
- Leverage Women's Leadership Initiative (WLI) to elevate and amplify women in civic, community, and professional spheres.

### ACTIONS

- ✓ Graduated the 14<sup>th</sup> class of CFL, now with 465 professionals in the ULI Atlanta alumni network.
- ✓ Graduated the 2<sup>nd</sup> cohort of Etkin Scholars program.
- ✓ Supported the 3<sup>rd</sup> cohort of "The Leaders" of WLI.
- ✓ Expanded annual sponsorship to include DEI support, allowing ULI to raise flexible, unrestricted dollars to support local DEI efforts.
- ✓ Hosted Atlanta's inaugural DevelUP conference in partnership with Baker Tilly to provide underrepresented developers the resources they need to excel in the industry. Assisted with planning and secured Mayor Dickens participation.
  - 2023-2024: Launch the 15<sup>th</sup> cohort of CFL; 3<sup>rd</sup> cohort of Etkin Scholars; and 2023 cohort of WLI's ChangeMakers (formerly known as The Leaders).
  - Spring 2024: Launch a Center for Leadership Alumni product council, offering a tangible pathway from CFL graduation to continued engagement within ULI.



# Net Zero/ ESG

### GOALS

- Use program opportunities through Young Leaders Group (YLG), CFL, and Programs Committee to lead on the issue of decarbonization and business case for it.
- Emphasize the net-zero component of the UrbanPlan curriculum.
- Use tours or spotlights to highlight members' installation of green infrastructure in development projects.

### ACTIONS

- ✓ Hosted a Smart Cities/Buildings program focused on the technology shaping and influencing the economy, energy sector, government, health, mobility, and public safety and security
- ✓ Hosted an ESG day through CFL.
- ✓ Participated in the 2<sup>nd</sup> ULI Net Zero Imperative cohort through six CFL mTAP capstone projects focused on accelerating building decarbonization across the Atlanta region.
  - December 2023: Convene a conversation around regional sustainability efforts to further educate the development community on their significance.
  - May 2024: Partner with ULI South Carolina and ULI North Florida to host a Coastal Development Forum in Savannah, GA.
  - Consider partnership with USGBC Atlanta to align ULI's global decarbonization mission priority with USGBC's mission to transform how buildings and communities are designed, built, and operated.