

# ULI Boston - Technical Assistance Panel

## Objective

ULI's Technical Assistance Panel (TAP) Program is designed to provide objective, expert advice to municipal and community-based organizations on the feasibility, design, or implementation of development initiatives. This pro bono program is specifically intended for organizations/municipalities that have limited staff or financial resources or that operate in economically disadvantaged areas. Previous projects have ranged in scope from generating ideas for redeveloping individual sites to creating strategies for revitalizing entire downtown districts.

## Program Description

ULI Boston's TAP program brings expertise in real estate, design, and finance to bear on local land use planning and development projects. Once a project has been designated as a TAP, ULI Boston will assemble an interdisciplinary team of senior local professionals for a day-long brainstorming session. The one-day TAP program developed out of ULI's fee-based national Advisory Services Program, which concentrates a team of national experts in a comprehensive look at all angles of the development process to formulate realistic options to move a project forward. The TAP program is a way for organizations with more limited resources to focus local ULI members' expertise on a specific problem at a nominal cost.

The sponsoring organization/municipality will be responsible for gathering and presenting the background needed to understand the project. The sponsor also will provide staff support for the meeting and for any follow-up report or presentation. ULI members will volunteer up to a day of their time developing an understanding of the problem, compiling recommendations, and debriefing the sponsors.

## ULI Core Competencies

Members of ULI Boston can provide expertise and advice in the following areas:

- Land use design and planning
- Market feasibility analysis
- Financial analysis and structuring
- Structuring private/public partnerships
- Adaptive reuse of buildings
- Development process, permitting and community relation

# Technical Assistance Panel: Community Obligations

## PANEL PREPARATION

- **Briefing Materials.** The municipality is responsible for assembling all relevant background information relating to the issues being addressed. This material should be ready for delivery to the panel co-chairs, panel members, and ULI Boston staff at least two weeks before the scheduled panel. ULI staff will determine what is needed for the panel's review and will assist the sponsor in reviewing materials and identifying additional resources and information needed by the panel.
- **Point of Contact.** The municipality must identify one main contact person for ULI staff and the sponsor, if applicable, to work with on panel logistics and during the report editorial process.
- **Stakeholder Interviews.** The municipality will collaborate with ULI staff and panel chairs to identify key stakeholders for interview. The municipality is responsible for outreach and scheduling.
- **Project/Area Tour.** If the issues deal with a specific project or project area, the municipality is responsible for arranging a tour of the study area. The municipality must arrange for transportation and an accompanying staff person to answer panel questions.
- **Other Resource Materials.** Additional resource materials identified through the preparation process should be available digitally. Such information might include maps, zoning and general plan materials, market data, economic studies and projections, and other similar materials as needed. ULI staff, the panel chairs, and the municipality will determine prior to the panel session what materials might be helpful to the panel deliberations.

## LOGISTICS

- **Panel Meeting Room(s).** The municipality is responsible for providing a conference room for the panel meeting, group interviews and the panel presentation. The presentation room should be set up in a manner consistent with the type of final presentation desired and the amount of audience participation desired. Wifi and access to a projector and screen are both necessary during the afternoon charrette and presentation.
- **Transportation.** As previously indicated, it is helpful but not critical that transportation for group activities, such as the site or area tour, are provided in one vehicle. To reduce the time required for local transportation, it is recommended that as many as the TAP activities as possible be conducted at the main location where the panel is meeting.
- **Meals.** The municipality is responsible for providing lunch and dinner for all ULI panelists and staff the day of the panel. ULI staff will work with the municipality on panelist dietary restrictions and the amount needed.
- **General Schedule.** The attached schedule represents the general formatting and timing of a TAP. The schedule is subject to change depending on the issues involved in the assignment. The participating municipality should work with ULI staff to create their agenda for the day.

## Technical Assistance Panel – SCHEDULE

- 8:00 a.m.** Panel meeting - introductions, initial discussion of key issues and additional information needs, review of schedule and panel member assignments.
- 8:30 a.m.** Site visit and/or start of interview process with key resource people, on an as-needed basis. Site visit should last no longer than one-and-one-half hours to allow time for interviews.
- 12:00 p.m.** Working lunch - report first overview of findings based on morning sessions; identify information gaps/conflicts that need to be resolved (town officials are invited to join the panelists at this time).
- 1:00 – 5 p.m.** Closed door charrette begins. Panel will develop consensus on major conclusions; identify key themes that address major issues; identify areas where the sponsor should do follow-up work to further assess panel's conclusions.
- 5:00 p.m.** Working Dinner (typically amongst panelists to prepare for the presentation).
- 6:00 p.m.** Presentation and discussion of panel conclusions and recommendations.

## Technical Assistance Panel – APPLICATION

Please provide the following information and submit to [Tim Moore at timothy.moore@uli.org](mailto:timothy.moore@uli.org).

**Applicant Organization**

**Date**

**Contact Person**

**Title**

**Address**

**City/State/Zip**

**Phone**

**E-Mail**

Please attach the following:

**1. Statement of the problem/issue.**

Provide a brief description of the major problems or issues that you wish the Panel to address. Include a brief history and current status of the project/study area/issue.

**2. Municipality information**

Please describe a basic overview of the community and its recent history of the study area.

**3. Questions to be addressed by the Panel**

List three concrete essential questions/issues to be evaluated by the Panel. Be as specific as possible. Please organize questions/issues by major topic, such as market issues; planning and design issues; feasibility and financing issues; management and implementation issues; and so on.

**4. Responsibilities - planning and logistics**

Please identify the point of contact within the community who will be responsible for working with ULI Boston to prepare background and briefing documents; organizing and scheduling interviews; conducting a project/area tour; providing physical facilities for panel work sessions and presentation; and providing general logistical support. Also identify to extent known the key people whom you believe can contribute to the panel's understanding of issues. Please provide name, organization and title, and telephone numbers for all individuals listed.

**5. Fee arrangement**

The ULI Boston/New England TAP fee is \$15,000.00. This fee includes the administration of the TAP, initial findings in the presentation and the final report. If the TAP is sponsored by a third-party entity the \$15,000 fee will be covered by the sponsor. In addition to this fee the municipality is responsible for: meals for the panel the day of the TAP, briefing material and other logistical costs including site tour transportation and meeting space. Please note panelists donate all their time in preparing for the panel, conducting the TAP, and contributing to the final report, a \$30,000 - \$40,000 value.