



TRIANGLE
2020-2022
STRATEGIC PLAN



ULI's mission is to shape the future of the built environment for transformative impact in communities worldwide. ULI Triangle supports this mission through our efforts in education, partnering with local governments and institutions, and through the efforts of our members in research and developing ideas around land use and building community.

CONTEXT STATEMENT

The Triangle is a growing region comprised of a diverse population, rich educational resources, and strength in the tech and medical sectors. Like many growing regions, the availability and cost of housing, transportation, and building equity within the diverse community require attention or creative solutions.

The global pandemic of 2020, while devastating in many ways, has afforded ULI and our District Council the opportunity to reflect on where we have been and plan for the future; ULI Triangle has the opportunity to impact these and other issues facing our region. This Strategic Plan is intended to set our priorities and guide our decision making for the next 18-24 months, understanding that dynamic change in our world is possible during that short period of time.



STRUCTURE

This plan focuses on three specific strategic priorities

- 1. BE A VOICE FOR HEALTHY COMMUNITIES
- 2. SHARE KNOWLEDGE THROUGH EDUCATION
- 3. PURSUE COLLABORATIVE PARTNERSHIPS

The specific initiatives and objectives for each of these priorities are outlined below.

1. BE A VOICE FOR HEALTHY COMMUNITIES

ULI, given our status as a nonprofit organization (501-c3), is in the unique position of convening healthy discussions on topics affecting the health and vitality of our local communities. Three specific topics are currently critical to our communities: Housing Affordability, Transportation and Infrastructure, and Community Equity. As such, our District Council has developed focus committees for each, comprised of passionate and knowledgeable ULI members to convene and meet regularly. These ‘think-tanks’ will chart a specific course for each topic including engagement and partnership with outside agencies and municipalities. Specific activities for each of these topics are outlined below.



A. HOUSING AFFORDABILITY

- Engage our member base to analyze and develop creative ways to improve housing gaps in the community, including financial analysis and structures.
- Develop educational information through research and sharing of ideas. Communicate ideas and information with local members, ULI National, and local partners.
- Seek partnerships with municipalities and agencies to attack local housing issues.

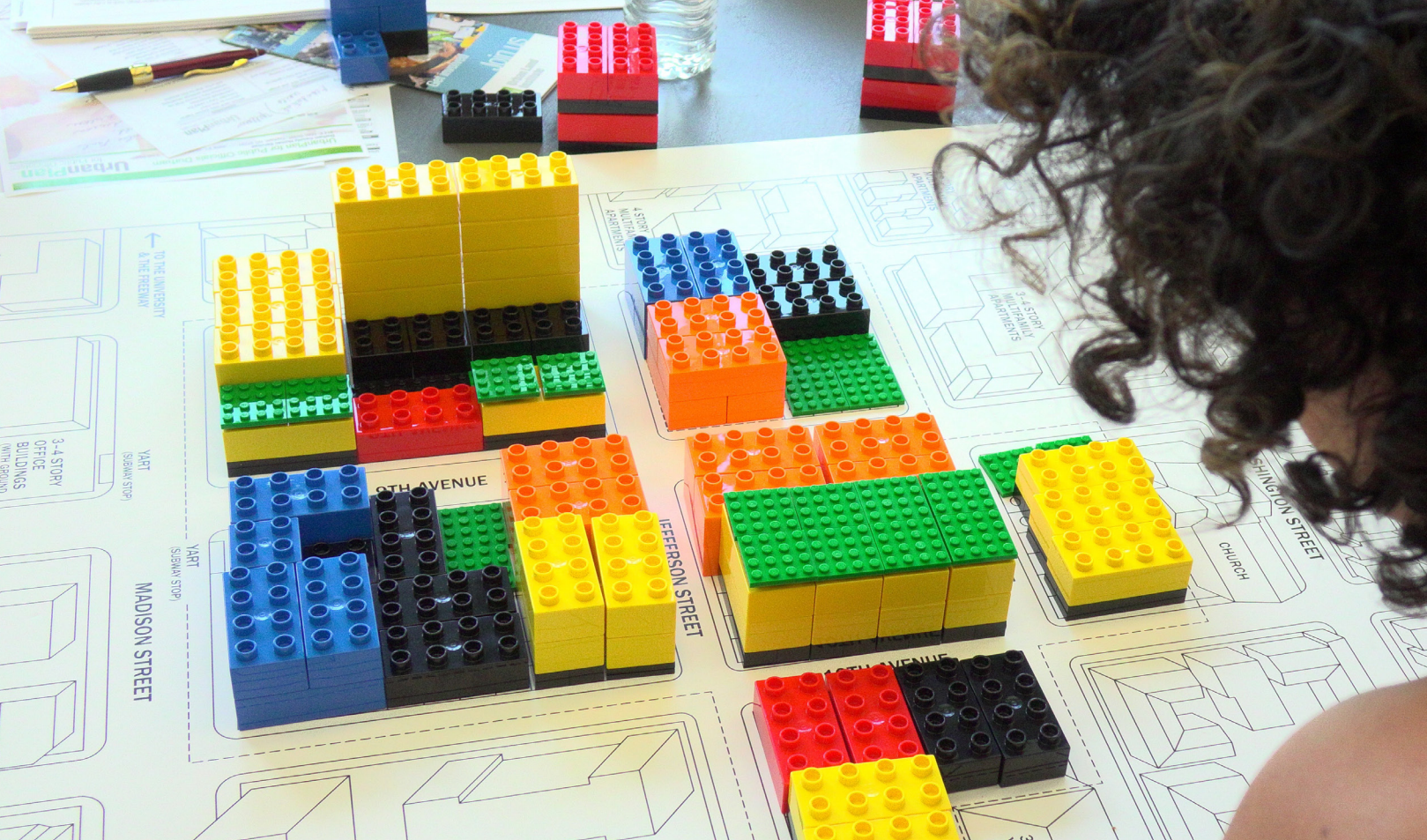
B. TRANSPORTATION/PUBLIC TRANSIT

- Leverage knowledge and experience of local members to research and develop specific solutions on topics such as:
 - Shaping Urban Space with Public Transportation
 - Equitable Transportation Access
 - The role of Transportation in fighting Climate change
 - Infrastructure Financing
 - Smart Infrastructure/Smart Streets
 - Bicycle Facilities, Greenways, and Pedestrian Facilities
- Connect with the ULI National knowledge base on the topics above.
- Serve as a resource and clearinghouse for publications, research, and media on transportation and infrastructure.
- Identify and engage in partnerships to provide educational and engagement support for community programs.

C. COMMUNITY EQUITY

Addressing equity in our community is an element of every ULI Triangle initiative, led by our Diversity-Equity-Inclusion committee (DEI). DEI focuses on ways to improve community equity in all ways including:

- Serve as a resource for ULI Triangle membership and leadership for education and resources on equity issues in real estate and land use. Commit dedicated financial resources to annual DEI programming.
- Encourage racially and ethnically diverse membership through tools of inclusion and dedicated financial support, including engagement of current members and new membership from traditionally underrepresented minorities.
- Use the DEI lens for internal and external advocacy, employment opportunities, mentoring and networking throughout various ULI committees and events.



2. SHARE KNOWLEDGE THROUGH EDUCATION

Utilizing our members passion, expertise, and partnership, continue to develop ULI Triangle as the expert on land use issues. Specifically focus on the following initiatives:

A. URBAN PLAN

- Proactively prepare public officials, community leaders and students to make balanced land use decisions:
 - Educate non-real estate professionals on the finances and pitfalls of real estate development.
 - Establish safe space to discuss the trade-offs made in real estate development.
- Establish ULI and Urban Plan as the pre-eminent real estate development educator and curriculum, respectively.
- Foster non-transactional relationships between ULI members and public officials, community leaders and students.

B. MEMBER PROGRAMMING

- Continue the development of our core member programming.
- Deliver excellence to members through Roundtable programs, Emerging Trends in Real Estate program, and the Carolinas Meeting.
- Identify opportunities to maximize networking opportunities during the pandemic.



C. MENTORING

- Continue the Partnership Forum Program, an annual formal mentor program for the Young Leaders Group (YLG).
- Support the ongoing mentorship programs of YLG and Women’s Leadership Initiative (WLI).
 1. YLG Partnership Forum
 2. Partnership 360
 3. WLI mentoring activities
- Coordinate with the DEI Committee to insure equitable representation in mentoring programs.

3. PURSUE COLLABORATIVE PARTNERSHIPS

Develop sustainable relationships with key municipal, institutional, and other business partners. Identify and meet with select groups to develop lasting partnerships. Quality not quantity is key to this effort, identifying fewer partnerships while developing deeper relationships early in the process to maximize positive community impact.

The intent is that ULI Triangle will develop a “Partner Committee” focusing on the development of noted strategic partners.



CLOSING NOTE

The foundation of this strategic plan is the understanding that the leadership of ULI Triangle should continue to provide excellence and improve the integrity of our organization through a focus on:

- Providing exceptional support to our members, including high-quality programming, engagement avenues, and creative networking opportunities.
- Developing leadership succession for our organization nurturing younger members to take on leadership roles.
- Monitoring fiscal condition and expenses during the current economic downturn.



STRATEGIC PLAN WORKING GROUP

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|--|---|--|
| Summer Alston
City of Durham | Andy Holland
SunTrust now Truist | Jon Wilson
Kimley-Horn (Retired) |
| Audie Barefoot
Fonville Morisey Barefoot | Erica Leatham
MI Homes | Smedes York
York Properties |
| TJ Barringer
Kane Realty | Carman Liuzzo
Highwoods | Patrick Young
City of Raleigh |
| Ken Bowers
City of Raleigh | Gretchen Saussy
MidAtlantic | |
| Jed Byrne
Capital Associates | Scott Selig
Duke University | |
| Craig Cadwallader
Avison Young | Stephen Vinson
Magnolia Development Company | |

MANAGEMENT COMMITTEE

- | | | |
|---|---|---|
| Richard Adams
Transportation Action
Committee Co-Chair
Kimley-Horn | Diversity & Inclusion
Chair
Urban Durham Realty | Joe Starr
Programming Co-Chair
Terracon |
| Audie Barefoot
District Council Chair
Fonville Morisey Barefoot | Andy Holland
Governance Chair
SunTrust now Truist | Mike Wilen
Young Leaders Group
Co-Chair
Phoenix Commercial |
| TJ Barringer
Treasurer
Kane Realty Corp | Erica Leatham
UrbanPlan Chair
MI Homes | Jon Wilson
Chair of Mission
Advancement
Kimley-Horn (Retired) |
| Ken Bowers
Transportation Action
Committee Co-Chair
City of Raleigh | Carman Liuzzo
District Council Vice Chair
Highwoods Properties | STAFF |
| Craig Cadwallader
Programming Co-Chair
Avison Young | Justin Parker
Sponsorship Chair
AI Neyer | Robin Hilliard
Executive Director |
| Griffin Dunaway
Young Leaders Group
Co-Chair
Cushman & Wakefield | Gretchen Saussy
Membership Chair
Mid-Atlantic Associates | Natasha Walker
Manager |
| Nicole Furnace | Laura Solie
Women's Leadership
Initiative Chair
Concord Street Partners | |

