

Technical Assistance Panels

What is a TAP?

History + Objective

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. The national **ULI Advisory Services** program offers strategic advice to public benefit landowners, including public agencies & local governments, non-profit organizations and mission-based developers. The program links the landowners to the knowledge and experience of ULI and its membership.

ULI Westchester/Fairfield has adapted this model to provide **Technical Assistance Panels (TAPs)** for use at the local level, anywhere within our District Council's geographical area which includes Westchester, Fairfield Orange, Rockland, and Putnam Counties. TAPs are intensive, on-site engagements conducted by career professionals who serve as volunteer panelists. The panelists deliver expert, multi-disciplinary advice to local governments, public agencies and nonprofit organizations facing complex land use and real estate issues. Drawing

from senior practitioners from a variety of real estate and land use disciplines. A key differentiating factor between ULI and other organizations providing technical assistance is the involvement of experts from the real estate and finance sectors who can speak to market viability, funding strategy and implementation. By providing an unbiased, strategic perspective on complex land use challenges, TAPs have been credited with accelerating and improving the development and design processes used by communities in their land planning efforts.

About ULI Westchester/Fairfield

ULI Westchester/Fairfield provides leadership in the responsible use of land and in the creation of sustainable, thriving communities. ULI Westchester/Fairfield promotes an open exchange of ideas, information, and experience among industry leaders and policy makers dedicated to creating better neighborhoods. ULI offers in-depth analysis of current land use issues and educates real estate professionals on the impact of land use policies on the state's future. The organization also invests in the professional and personal development of the next generation of community and real estate industry leaders. ULI Westchester/Fairfield carries out, at the local level, the mission of ULI, a global non-profit headquartered in Washington D.C with more than 40,000 members worldwide. For more information, visit <https://west-fair.uli.org/>



TAPs Program Description

ULI Westchester/Fairfield conducts TAPs in a one- or two-day format. Both versions commence with a set of questions proposed by the sponsoring organization (the "Client") – a local government, public agency, nonprofit organization or nonprofit developer – about a specific development issue or policy barrier within a defined geographic area (the "Study Area"). The one-day commitment includes a brief introduction and overview by the Client, a half- day working session with the panelists, followed by a presentation of recommendations to the Client, and a final report. The two-day commitment includes a full site tour, confidential stakeholder interviews, intensive working sessions, a presentation of recommendations to the Client, and a final report outlining the process and recommendations.

RECENTLY COMPLETED TAPs INCLUDE:

ULI Village of Sleepy Hollow (2018)

ULI TAP Morris Crossroad

ULI TAP Hudson River (2017)

In both one-day and two-day formats, ULI Westchester/Fairfield assembles a multi-disciplinary panel of experts that explore the project, interview stakeholders and make recommendations. TAP Panelists consist of unpaid volunteers from the 2,000+ ULI members in the Westchester/Fairfield District Council recruited 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 Westchester/Fairfield's Technical Assistance Panels lies in bringing together a cross-section of experts, who don't have a vested interest in the project to examine the issues from multiple angles and produce recommendations and/or implementation strategies based on sound information, community realities, and best practices.

How Does a TAP Work?

TAP Scope

As part of the TAP application process, the Client is responsible for drafting the TAP Scope, which consists of a detailed description of the need for the Technical Assistance Panel. It should include:

- Background information
- Associated current and future plans (both public and private)
- Maps and planning materials
- Demographics and statistics
- Planning and development goals
- Explanation of previous efforts to address the scope of work, including outcomes of those efforts

TAP Panelists

Panelists are ULI member experts who volunteer their time because of a commitment to the ULI mission. The panelists donate all of their time preparing for the TAP, the day of the TAP and contributing to the final report—an estimated \$30,000-\$40,000 total value.

Client Responsibilities

At a high level, the Client is responsible for:

- Preparing and providing all briefing materials
- Briefing the panelists before/during the workshop
- Arranging the site tour
- Inviting key stakeholders to attend interviews during the TAP
- Arranging for a public presentation of the TAP's recommendations (if appropriate)

A more detailed outline of Client Responsibilities will be provided upon finalizing the TAP agreement.

Timeframe

Pre-Panel

Upon receiving a completed TAP application from the Client, members of the ULI NY TAPs Steering Committee and staff will review it and arrange an initial meeting with the applicant 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 within a month. Once a TAP agreement is finalized, typically, at least three to four months are needed to provide sufficient time to



assemble a multidisciplinary group of panel members, compile briefing materials, and plan for the TAP. A private Client briefing to the panelists occurs one to two weeks prior to the TAP.

Day-of Panel

A one-day TAP is more condensed and consists of:

- Brief introduction and overview by the Client
- Half-day working session with the panelists
- Presentation of the final panel recommendations to the Client

A two-day TAP consists of two days of intensive working sessions, including:

- Introduction and overview by the Client
- Guided site tour of the study area
- Confidential stakeholder interviews conducted by the panelists
- Presentation of the final panel recommendations to the Client

Post-Panel

Following the TAP, we will commence writing the final report, which will be delivered to the Client within 3-4 months. Once the final draft of the written report is approved by the Client, we will commence graphic layout of the final report. Upon completion, the Client will be provided a professionally designed TAP report in high-resolution PDF format (for web and print purposes). We conduct regular follow up calls and/or meetings with the Client post-panel to identify opportunities to best leverage the TAP recommendations.

Cost

ULI Westchester/Fairfield charges a fee for each of its TAPs to cover staff time and associated costs (workshop materials, report writer's fee, transportation/lodging, venue/catering, and other logistical costs). Fees vary from \$15,000-\$20,000 for a two-day TAP (anywhere within NYS), depending on location, the type and extent of the scope, and final written report; and \$10,000 for a one-day TAP (limited to Westchester/Fairfield only).

We encourage you to consider a TAP for your community. If you have further questions or would like to discuss a potential opportunity, please contact ULI Westchester/Fairfield:

Mara Winokur,
ULI Westchester/Fairfield & ULI NNJ Executive Director