

# Technical Assistance Panel

## TAP

Objective and responsible advice on land-use planning, development, and redevelopment issues.



Urban Land **Triangle**  
Institute

- » What
- » Why
- » Who
- » How
- » Sample Agenda
- » Client Responsibilities
- » District Council Responsibilities

- » Offered by ULI Triangle as part of Urban Land Institute's Advisory Services program
- » Features
  - › Short time frame (one- to two-day work session)
  - › Focus on discrete, well-defined problem
  - › Panel comprised of ULI members with subject matter expertise
- » Modest costs for the applicant
  - › \$10,000

## Typical areas of expertise and advice:

- » 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 relations

- » Leverage ULI member knowledge and experience
- » Provide strategic advice to help communities and organizations address key land use and real estate development issues
- » Provide sounding board for cutting edge issues such as infrastructure, workforce, affordable housing and other policies
- » Provide opportunity for ULI members to learn and grow by participating in problem-solving exercises for “real world” land use dilemmas
- » Build community awareness for ULI mission

- » Panels comprised of ULI member industry experts with diverse viewpoints (e.g. market analysts, developers, planners, architects, public officials, lenders)
- » To ensure objectivity, panel members may not
  - › Be involved in matters pending before the sponsor
  - › Work for the sponsor
  - › Solicit work from the sponsor during and six months following the panel's assignment period

- » Organizations eligible to receive TAP services include:
  - › Local governments
  - › Colleges and universities
  - › Non-profit housing and community development entities
  - › Regional councils and planning bodies, including Councils of Government and Metropolitan Planning Organizations
  - › Business improvements districts
  - › Economic development commissions, corporations, and entities
  - › Neighborhood or citizen-led advocacy and improvements organizations

- » Client submits application with defined issue
- » District Council TAP Committee reviews and works with client on final scope and questions
- » TAP Committee recruits panel to address issue(s)
- » Client develops briefing books, plans site tour (if applicable), and secures meeting space and food
- » TAP Committee and Client develop list of stakeholder interviews
- » TAP panel held and preliminary findings presented at conclusion
- » Final written report delivered within 6 – 8 weeks



---

## Day 1

2:00 p.m.	Welcome & Introductions
2:30	Site Tour
4:30	Sponsor briefing; stakeholder input
6:30	Panel Debriefing Dinner

---

## Day 2

8:00 a.m.	Breakfast; Discussion of panel objectives
8:30	Panel working session
Noon	Working lunch
3:30 p.m.	Wrap-up and finalization of presentation
4:00	Presentation rehearsal
5:00	Presentation of recommendations
6:00	Adjourn

- » **Briefing Book**

Compile comprehensive package of background data and information necessary for the panel to effectively perform its work

- » **Meeting Space**

Provide meeting and work spaces required by the TAP

- » **Meals**

Provide refreshments and meals for panelists and participants (breakfast and lunch day of the TAP; dinner night before)

- » **Site Visit**

Organize site visit, where applicable, and transportation

- » **Interviews**

Schedule stakeholder interviews

- » Work with client to define expectations, shape questions, prepare for panel
- » Develop scope and agenda for TAP
- » Work with client to identify expertise needed to complete assignment
- » Confirm panelists and communicate roles and responsibilities
- » Manage TAP writer and panel deliberations
- » **Presentation**  
Develop presentation of results
- » **Report**  
Deliver written report to Client 6 – 8 weeks after TAP completion

TAP Application, Manual & Reports  
[triangle.uli.org/uli-in-action/taps/](http://triangle.uli.org/uli-in-action/taps/)

## Contact

**Richard Cox**

*Associate*

ULI Triangle

[richard.cox@uli.org](mailto:richard.cox@uli.org)  
919-578-7470

**Julie Paul**

*Executive Director*

ULI Triangle

[julie.paul@ULI.org](mailto:julie.paul@ULI.org)  
919-417-2766