

# MEMO

To: Chuck Bean, Executive Director, Metropolitan Washington Council of Governments  
Ron Kirby, Director, Transportation Planning, Metropolitan Washington Council of Governments  
Paul DesJardin, Director, Community Planning & Services, Metropolitan Washington Council of Governments

From: Alia Anderson, Director of Community Outreach, ULI Washington  
Bob Eisenberg, Chair, ULI Washington Technical Assistance Panel Committee  
Lisa Rother, ULI Washington Executive Director

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**CONCEPT OUTLINE : ULI Washington and Metropolitan Washington Council of Governments (COG) Partnership to Support Strategic Investment in Activity Centers**

## OVERVIEW

ULI Washington proposes a three year partnership with COG to deliver nine (9) Technical Assistance Panels (TAPs) focused on identifying priority, catalytic strategies to maximize the impacts of investments in Activity Centers. Technical Assistance Panels (TAPs) are one of ULI Washington's signature programs, where a panel of 10-12 senior-level experts work over a concentrated timeline to evaluate and provide market-based feedback on a local development or land use challenge. Panelists are selected from the over 1,700 ULI members in the Washington District Council based on the specific nature of each assignment. Depending on the issues being tackled, panel member expertise typically includes developers, property owners/managers, investors, designers, planners, engineers, market and financial analysts, as well as members of the public sector. The panel takes place over a one-and-one-half day timeline, with a report of recommendations completed thereafter.

COG is in the process of developing an Activity Center Strategic Development Plan, which seeks to make the region's Activity Centers more livable, resilient and inclusive. The Plan will provide a framework to guide local governments, developers, transit agencies, community organizations, business groups and other stakeholders in making strategic investments that enhance quality of life in these places and strengthen the local and regional economy. The proposed TAPs will focus on the type, scale, and timing of targeted investments in specific Activity Centers that will be most effective for each Center. In support of the Strategic Development Plan, ULI Washington will provide three TAPs each year for three

consecutive years, targeting Activity Centers located throughout the region. The TAPs will be delivered through a partnership effort between ULI Washington, COG, and the local jurisdiction who will serve as the TAP “sponsor.” Local jurisdictions will be asked to submit a brief application and each year, COG and ULI will select the three proposals which are the best fit for the program, provide geographic diversity, and offer opportunities for knowledge transfer with other cities/counties. The capacity of the applicant organization to support the TAP process will be evaluated as part of the review process. Priority will be given to areas where new transit investment is scheduled to occur or in underutilized areas with existing transit.

To support geographic diversity, the program will select one TAP from each of Maryland, D.C. and Virginia each year. To the extent possible based on applications received, COG and ULI will aim to select proposals from similar place types ( [Urban Centers](#); [Dense Mixed-Use Centers](#); [Suburban Multi-Use Centers](#); [Close-in and Urbanizing Centers](#); [Revitalizing Urban Centers](#); and [Satellite Cities](#) ) each year.

### **DELIVERABLES**

The recommendations of the panel will be presented in a slideshow at the culmination of the 1.5 day TAP. Once each TAP is completed, the recommendations will be written into a printed report that can serve as a useful resource to the TAP sponsor cities/counties and also to other jurisdictions in the region facing similar challenges.

### **PANEL ASSIGNMENT**

In each of the selected jurisdictions, ULI Washington and COG will work with the local city/county to identify a set of specific questions that the panel will address. The questions should be focused on one or all of the following themes:

- What priority, near-term investments are needed in the Activity Center to catalyze private investment and support implementation of locally adopted land use plans?
- What strategic partnerships will be essential to build consensus around the implementation of local land use plans for the Activity Center?
- What strategies should be applied to address displacement of residents and businesses in and around the Activity Center during and following the implementation of the plan?

### **PANELISTS**

Unlike traditional TAPs, ULI Washington views this program as an opportunity to foster peer-to-peer learning between the local leadership who will ultimately be essential to the implementation of local plans in Activity Centers. For this reason, ULI Washington proposes to include 2-3 panelists on each panel who are local government staff (e.g. Planning Directors, Economic Development Executives, Housing Authority Directors, etc.) from jurisdictions that are comparable to the city/county that is sponsoring the TAP. This will allow for improved relationship building and knowledge exchange between the jurisdictions that make up the National Capital Region.

### **PARTNER RESPONSIBILITIES**

- ULI Washington:
  - o With COG, draft application, review & select participants each year
  - o With local sponsor, develop panel assignment and scope of work

- Identify panelists
- Develop TAP agenda, coordinate logistics for 1.5 day panel
- Write, print and distribute final report
- COG:
  - With ULI, draft application, review & select participants each year
  - Distribute program information to member jurisdictions
  - Develop demographic/economic analysis for each TAP site as part of panel briefing book
- Local Sponsor:
  - With ULI, develop panel assignment and scope of work
  - Develop briefing materials to provide background information for panelists
  - Provide venue for 1.5 day TAP

### **TIMELINE**

- Present framework concept to Planning Directors at September 20<sup>th</sup> meeting
- Launch application process in October 2013
- Conduct round one TAPs in Spring 2014 (March – July)
- Release final reports August/September 2014

### **COST**

ULI Washington typically charges \$15,000 for a TAP. For this program, we propose a three-way partnership with regard to cost sharing:

- \$3,750: ULI Washington discount/subsidy
- \$3,750: COG
- \$7,500: Local TAP Sponsor

Total annual cost to COG for three TAPs: \$11,250

Total annual ULI subsidy: \$11,250

## **Frequently Asked Questions about ULI Technical Assistance Panels**

### **1) *What is ULI?***

The Urban Land Institute is a nonprofit research and education organization supported by its members. Founded in 1936, the Institute now has over 30,000 members in 95 countries, representing the entire spectrum of land use and real estate development disciplines working in private enterprise and public service – including leading property owners, investors, advisors, developers, architects, lawyers, lenders, planners, regulators, contractors, engineers, university professors, librarians, students, and interns. ULI Washington is one of ULI's largest District Councils worldwide, with almost 2,000 members. To learn more about ULI Washington, visit [www.washington.uli.org](http://www.washington.uli.org).

### **2) *What is the benefit of holding a TAP?***

Think of a TAP as a fast-paced brainstorming session with a group of outside experts who will use their extensive professional experience to respond to a set of specific questions posed by a local government sponsor. The panel of professionals that come together to serve on a TAP are leading experts in the real estate, land use, planning and community development fields. They are hand-picked for each TAP based on the particular local challenge. The multi-disciplinary nature of the panel and the quick-response nature of the TAP process often allow for new, creative ideas to be explored and vetted with a group of experts who bring “fresh eyes” to the issue. To review past TAPs conducted by ULI Washington in the National Capital Region, visit [www.washington.uli.org/TAPs](http://www.washington.uli.org/TAPs).

### **3) *What is the typical agenda for a TAP?***

The TAP takes place over 1.5 days. On day one, the panel listens and learns. They usually tour the study area, hear a presentation from the city or county sponsor, and meet with key local stakeholders. On day two, the panel debates and develops their recommendations, resulting in a presentation that evening.

### **4) *What kind of stakeholder/public involvement is involved in a TAP?***

Stakeholder involvement is a key part of the TAP process. Due to the short term (1.5 days total) timeline of a TAP, ULI Washington works with the TAP sponsor (usually a city or county) to identify a group of key stakeholders whose input will be essential to the panel in addressing the local challenge. During the first day of the panel exercise, the ULI experts meet with these stakeholders and listen to their views. The broader public is usually invited to hear the panel's presentation on Day 2, and is encouraged to share feedback at that time. It is important to note that a TAP is a very short-term, exploratory exercise that usually serves as one step in a broader public planning process, which would involve more extensive public outreach.