

ULI Boston  
400 Atlantic Ave  
Boston, MA 02110  
Phone: (857)263-7585  
[boston@uli.org](mailto:boston@uli.org)  
<http://boston.uli.org>

## 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.

Sponsors also must commit to one-year follow-up meeting with ULI.

### 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 relations

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## Technical Assistance Panel: SPONSOR OBLIGATIONS

### PANEL PREPARATION

- **Briefing Materials.** The sponsor is responsible for assembling all relevant background information relating to the issues being addressed. This material should be ready for delivery to the panel chair, each panel member and ULI Boston staff at least two weeks before the scheduled Panel. The ULI assigned project manager will determine what is needed for the Panel's review and will assist the sponsor in reviewing materials and identifying additional materials and information needed for the Panel.
- **List of Resource Individuals.** The sponsor must prepare a list of resource individuals available on the day of the TAP. The list should be restricted to no more than 5 people and should include key members of the private and public sectors who might provide valuable insight and information to the panel.
- **Interview Schedules.** The sponsor is responsible for gathering these key stakeholders together for the morning session and, if necessary, during the one-hour follow-up afternoon session.
- **Project/Area Tour.** If the issues deal with a specific project or project area, the sponsor is responsible for arranging a tour of the project or project area. The sponsor must arrange for transportation and an accompanying staff person to answer panel questions.
- **Other Resource Materials.** Additional resource material that is not appropriate or too bulky for inclusion in the panel briefing books should be made available at the panel meeting place. Such information might include zoning and general plan materials, market data, economic studies and projections, maps and other similar materials as needed. The ULI project manager and the sponsor will determine prior to the panel session what materials might be helpful to the panel deliberations.

### LOGISTICS

- **Panel Meeting Room(s).** The sponsor 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.
- **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. In order to reduce the time required for local transportation, it is recommended that as many interviews as possible be conducted at the main location where the panel is meeting.

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## Technical Assistance Panel APPLICATION FORM

Please provide the following information and submit to ULI Boston

Applicant Organization \_\_\_\_\_ Date \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Title \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ 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. Sponsor information**  
Please describe (1) the type of and major business activity of the sponsoring organization; (2) what role the sponsor plays in the particular issue(s) suggested for the Panel; and (3) include a brief history of important projects/activities that recently have taken place or are planned or under consideration.
- 3. Questions to be addressed by the Panel**  
List the three 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. Sponsor responsibilities - planning and logistics**  
Please identify the individuals 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, telephone and fax numbers for all individuals listed.
- 5. Fee arrangement**  
In December 2011, ULI Boston instituted a \$5,000 fee for the TAP program. This fee helps underwrite the overhead costs and staff time that is associated with the TAPs. Additional costs include the report writer's fee (\$1,500), transportation costs for the panelists (mileage to and from the TAP), lunch, briefing material and other logistical costs. The panelists donate all of their time preparing for the TAP, the day of the TAP and contributing to the final report, a \$30,000 - \$40,000 value.
- 6. General Panel Schedule**  
The attached schedule represents the general format and timing of the Panel process. The schedule is subject to change depending on the issues involved in the assignment.

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### **GENERAL SCHEDULE – Local Technical Assistance Panel**

- |            |  |
|------------|--|
| 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.   |
| 1:00 p.m.  | Follow-up interviews if necessary.   |
| 2:00 p.m.  | 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.                                  |
| 3:00 p.m.  | Organize draft outline of key summary and conclusions; draft detailed outline covering key points and issues; and convert to flip chart/report handout for presentation. Organize presentation and panelist involvement. |
| 5:00 p.m.  | Presentation and discussion of panel conclusions and recommendations.  |