



ULI'sf TECHNICAL ASSISTANCE PANELS APPLICATION

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. Over 600 panels have been conducted in 18 countries. Since 1982, ULI's Advisory Services panels have assisted 12 Bay Area cities. Since 2006, ULI San Francisco has adapted this model to provide [Technical Assistance Panels \(TAPs\)](#) for use at the local level, assisting 33 cities throughout the San Francisco Bay Area.

ULI'sf conducts two types of TAPs. Both versions commence with a set of questions proposed by the sponsoring organization (the 'Client') – a public agency, nonprofit organization or nonprofit developer – about a specific development issue or policy barrier within a defined geographic area. The first TAP model is a one-and-a-half-day commitment, which includes a site visit, Client and stakeholder interviews, intensive working sessions, and a presentation of recommendations. The second model is a one-day commitment, which includes a brief introduction and overview by the Client, an approximately 4-hour working session with the panelists, followed by a presentation of recommendations to the Client. Both TAP models conclude with a memo or report outlining the panelists' recommendations.

ULI San Francisco assembles an interdisciplinary panel of experts that explore the project, interview stakeholders, and make recommendations. TAP Panelists consists of unpaid volunteers from the 2,400 ULI members in the San Francisco District Council chosen specifically for each assignment. Panelists usually include at least one for-profit or nonprofit developer, designer and/or planner, market and/or financial analyst, and a regulatory expert. Panelists approach the assignment from all perspectives, including market potential, land use and design, financing and development strategies, governance, and implementation. The strength of ULI San Francisco's Technical Assistance Panels lies in the cross-section of experts examining the issue from multiple angles and producing recommendations and/or an implementation strategy that is based on sound information, community realities, and best practices.

Where appropriate and beneficial to the client, ULI San Francisco will partner with other organizations to extend the breadth and expertise of the panel.

ULI San Francisco is accepting applications from communities for the 2016-2017 TAP cycle. Applications will be reviewed by our Technical Assistance Committee on an on-going basis.

ULI San Francisco charges a fee for each of its panels to cover associated costs and staff time. At the early stages, the administrative costs will be underwritten by ULI San Francisco. Clients are charged a fee of \$20,000 for a one and a half-day TAP and \$10,000-\$15,000 for a one-day TAP, depending on the type and extent of the written report – a small portion of the total value service of TAP. Panel members are ULI experts who volunteer their time because of a commitment to the ULI mission and the principles of redevelopment, planned growth, economic expansion, and local and regional capacity building.

We encourage you to consider a TAP for your community. Please find the 2015-2016 TAP Application attached. If you have further questions, please contact Natalie Sandoval, Director, ULI San Francisco, (415) 268-4039 or email natalie.sandoval@uli.org.



**ULI San Francisco
Technical Assistance Panel (TAP) Program
ISSUE AREAS AND SELECTION CRITERIA**

Technical Assistance Panels (TAPs) enhance community leadership, clarify community needs and assets, and advance land use policies that expand economic opportunity, maximize market potential, and conserve natural environments.

TAPs also allow ULI San Francisco to address multiple areas of interest. In particular, TAP applications will be considered in the following areas:

- **Transit Oriented Development** - The Bay Area expects 1.7 million new people over the next 25 years. Land use plans and policies that encourage development near transit centers can reduce sprawl, traffic and pollution, helping to build sustainable communities.
- **Redevelopment and Reinvestment in Communities** - TAPs can generate investment in communities by indicating particular policies and organizational structures that generate infill development, retail recruitment, increased housing opportunities, and other facets of community rejuvenation. Redevelopment also slows the pace of greenfield loss and minimizes the need for costly new infrastructure on the edge of the region.
- **Responsible Use of Land** - TAPs can inform communities how to plan for population and economic growth, and use best management practices to plan for their future. The sustainable use of natural resources, sufficient provision of public services, and equitable supply of housing, employment, transportation and preservation of natural resources are directly related to a community's ability to manage their future.
- **Collaboration and Leadership Capacity** - Many of the most common problems facing communities today – matching of housing with jobs, transportation, and natural resource management – are regional in nature. Solutions are best achieved through consensus and collaboration across departmental, political, and geographic lines. Communities with strong leadership capacity and who seek out collaborations are encouraged to apply.

TAP applications must meet the following criteria:

1. Strong local leadership capacity, by abiding to the program's terms and conditions; respect TAPs findings by galvanizing community support; and demonstrate a sincere attempt to implement recommendations.
2. A clearly defined scope of work, and three to four well-articulated questions to be addressed during a one-day or one and a half-day session.
3. A clearly defined geographic boundary (a neighborhood, district, corridor, etc.).

To review a complete list of previous TAPs conducted by ULI San Francisco or to download TAP reports, visit <http://sf.uli.org/uli-in-action/technical-assistance-panels/>.

All applicant organizations are expected to fulfill certain obligations upon approval of application. The success of a TAP panel is dependent on the timely and thorough completion of the following items (this list is not all-inclusive): gathering briefing book materials; identifying venue for panel; conducting



site tour (for one and half-day panel); recommending community leaders for interview process; and facilitating open communication with ULI San Francisco. A complete list of roles and responsibilities will be provided upon review of application.

Please provide the following information:

Lead Applicant Organization: _____

Contact Person: _____ Title/Role: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone Number: _____ Fax Number: _____

E-mail: _____

Please attach the following:

SCOPE OF WORK

Provide a one-page description of the need for the Technical Assistance Panel. Include background information on the affected site or area and current and future plans or activities (both public and private). Maps, statistics, planning and development goals, and other information may be attached if relevant. Provide an explanation of previous efforts to address the scope of work, including outcomes of those efforts.

QUESTIONS FOR THE EXPERT PANEL

Provide three to four specific questions about the affected site or area for the panel to address.

LEADERSHIP SUPPORT

Provide a letter from the municipality in support of the TAP process agreement with the criteria outlined in this application. Letters of support from local businesses and/or community-based organizations are encouraged but are not required.

RETURN TO: Natalie Sandoval

Director, ULI San Francisco

One California Street, 25th floor, San Francisco, 94111

Phone: (415) 268-4039

Email: natalie.sandoval@uli.org