



## Technical Assistance Panel Overview

1. ULI Advisory Services Panel (international)
  - a. 5 days; international panelists
  - b. Assists communities by bringing real estate, planning, and development experts together to provide unbiased, pragmatic advice for addressing complex land use and development issues.
2. What is a ULI Northwest Technical Assistance Panel (regional)
  - a. 1½ days; regional panelists within reasonable driving distance of site at issue
  - b. Has elements similar to global ULI panels:
    - i. Panel members volunteer their time to serve on the panel and are not compensated for their time, only their expenses.
    - ii. No member of the Panel has a conflict of interest, real or perceived, by serving on the panel.
    - iii. The Panel's recommendations are unbiased and cannot be modified substantively once given to the Host.
3. How does it work
  - a. The Host develops geographic scope and questions at least 8 weeks before Panel; ULI staff and volunteers assist
  - b. ULI, in concert with the Host, identifies expertise needed to address questions
  - c. Select a range of dates for Panel and briefing
  - d. ULI invites Panelists to participate
  - e. The Host prepares a briefing packet for each participant
    - i. Recommend no more than 30 pages
    - ii. Distribute packets to panelists & ULI staff at a minimum of one week prior to briefing day.
  - f. Site tour and briefing
    - i. Host leads tour of site and provides overview for panelists
    - ii. If transportation is necessary for site tour, host to arrange and cover costs
    - iii. ULI to provide food and beverages, if applicable
  - g. Panel day – begins with reviewing questions presented; final briefing by stakeholders and questions by panelists; optional interviews; closed door deliberations; presentation to host staff (preliminary findings; dialogue; clarifying questions from staff); final presentation to staff, key stakeholders, and elected officials (if applicable)
  - h. Final Report is drafted, designed, published, and delivered to the Host
4. How much does it cost
  - a. International: 5 day ULI Advisory Services Panel is \$125,000
  - b. Regional:
    - i. ULI Northwest Technical Assistance Panel fee of \$22,000 includes the following:
      1. ULI Northwest's services in coordinating and organizing the TAP

2. Reimbursing the expenses of volunteer panel members who live within a driving distance of 60 minutes.
  3. Providing food and beverages for panelists during the day of the Panel and during the ½ day briefing (if applicable)
  4. PowerPoint slides of final recommendations delivered at end of Panel day
  5. Contracting with a consultant to prepare a report of recommendations
  6. Graphic design services to produce Final Report
  7. 10 copies of the Final Report
- ii. Payment schedule
    1. A deposit of \$2,000 is due in advance of the initial site visit.
    2. An additional payment in the amount of \$10,000 is due on the TAP Panel day.
    3. A final payment in the amount of \$10,000 is due upon completion/delivery of the final TAP report by ULI Northwest.
  - iii. Optional components
    1. Dinner the evening before the Panel: approximately \$2,000
    2. Participation by panelists who live outside of a 60 minute driving: travel expenses (mileage/flight, hotel, additional meals, etc.), approximately \$600 per panelist
5. Key Next Steps
- a. Scope of geographic area
  - b. Develop scope of questions
  - c. Identify expertise needed and ideal panelists
  - d. Finalize timing