About ULI Advisory Services

The mission of the ULI Advisory Services program is to bring the finest expertise in the real estate field to bear on complex land use planning and development projects, programs, and policies. Since 1947, this program has assembled well over 700 ULI-member teams to help sponsors find creative, practical solutions for issues such as downtown redevelopment, land management strategies, evaluation of development potential, growth management, community revitalization, brownfield redevelopment, military base reuse, provision of low-cost and affordable housing, and asset management strategies, among other matters. A wide variety of public, private, and nonprofit organizations have contracted for ULI’s advisory services.

Each panel team is composed of highly qualified professionals who volunteer their time to ULI. They are chosen for their knowledge of the panel topic and are screened to ensure their objectivity. ULI’s interdisciplinary panel teams provide a holistic look at development problems. A respected ULI member who has previous panel experience chairs each panel.

The agenda for Advisory Services panels is tailored to meet a sponsor’s needs. Panelists are briefed by the sponsor, deliberate on their recommendations, and make a final presentation of those recommendations. During longer panel offerings panelists also engage with stakeholders through in-depth interviews. A written report is prepared as a final deliverable.

Because the sponsoring entities are responsible for significant preparation before the panel’s visit, including sending extensive briefing materials to each member and arranging for the panel to meet with key local community members and stakeholders in the project under consideration, participants in ULI’s panel assignments are able to make accurate assessments of a sponsor’s issues and to provide recommendations in a compressed amount of time.

A major strength of the program is ULI’s unique ability to draw on the knowledge and expertise of its members, including land developers and owners, public officials, academics, representatives of financial institutions, and others.

ULI Program Staff

Mary Beth Corrigan
Executive Vice President, Global Leadership

Thomas W. Eitler
Senior Vice President, Advisory Services

Deborah Ker son Bilek
Vice President, Advisory Services

Lauren McKim Callaghan
Director, Advisory Services

Jaqueline Canales
Director, Advisory Services

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Senior Associate, Advisory Services

Sarah Kraatz
Associate, Awards and Advisory Services

James A. Mulligan
Senior Editor/Manuscript Editor

Brandon Weil
Art Director

Craig Chapman
Senior Director, Publishing Operations
To Our Members

I would like to again thank all the ULI members who have devoted their time to and shared their wisdom by volunteering for ULI’s Advisory Services program. The program would not exist without the commitment you and your organizations make to ULI’s mission. We are stronger because of your dedication to sharing industry best practices with communities in need.

This publication highlights the work of the Advisory Services program from July 2019 to June 2020. These examples show the range of panels and projects we have been honored to offer thanks to your time and expertise.

As we make our way through the second half of 2020, we are faced with multiple challenges. The COVID-19 pandemic has fundamentally changed our world. Though the impacts of the pandemic on land use, the real estate industry, and municipal organizations are not yet fully understood, ULI has begun to examine how to react, how to adapt, and how to pivot effectively in the face of this challenge so Advisory Services can collectively explore our current landscape and develop meaningful recommendations.

In April, Advisory Services began providing virtual offerings. Several virtual panels have since been completed, including a two-and-a-half-day panel for Montgomery County, Maryland, and project analysis sessions for Rochester, New York; Brampton, Ontario; and Fayetteville, Arkansas. The Advisory Services program is committed to continuing to innovate and provide communities around the world with access to the program's services and the unparalleled knowledge of ULI members. A list of Advisory Services virtual programs is available at americas.uli.org/programs/advisory-services.

The COVID-19 crisis is only one challenge facing communities today. The death of George Floyd has also had a profound impact on our world by amplifying the tensions and challenges that communities have faced historically—and continue to face every day. Over the past several years, ULI Advisory Services panels have touched on issues that directly relate to equity, inclusion, community engagement, economic opportunity, and more. Our hope, beginning immediately, is to focus our efforts in areas where the Advisory Services program can continue to expand its impact in these issue areas—particularly for communities in pain.

There is important work to do, and Advisory Services—in partnership with committed ULI members like you—is ready to rise to the occasion by bringing recommendations rooted in best practices to communities in need. Advisory Services panelists know how to ask the hard questions, deliberate on challenging and uncomfortable topics, and come to a resolution on thorny matters—all in the service of improving communities around the world and helping them become more just and equitable. Advisory Services has established an Economic Opportunity panel offering that can focus on African American and other communities of color. We look forward to working with our members, engaging new voices in our program, and collaborating with partner organizations to better understand and fight racism, as well as using real estate investment and land use policy as vehicles that can truly have a positive impact and make a difference.

Finally, in July, Advisory Services saw a change of leadership, and we were joined by our new executive vice president for global leadership, Mary Beth Corrigan. I want to extend my profound thanks and appreciation to Paul Bernard, our executive vice president for Advisory Services, who departed from ULI in July and served the Advisory Services program with honor and integrity. Paul was instrumental in transforming the Advisory Services, UrbanPlan, and the Awards programs over the past three years. His thoughtful, passionate, and personal approach to our work will be impossible to replace, and we are deeply grateful for his service.

Tom Eitler
Senior Vice President, Advisory Services
FY2020 Global Activity Summary

ULI completed 16 Advisory Services panels, one post-panel workshop, and four project analysis sessions globally in fiscal year 2020.

**United States**

- Pomona, CA (5 days)
- Washington, D.C. (two 5-day panels)
  - Affordable Housing
  - BID Sustainability
- Raleigh, NC (two 5-day panels)
  - Downtown South
  - Shaw University
- Austin, TX (two 5-day panels)
  - Parks and Open Space/10 Minute Walk
  - Capping I-35
- St. Thomas, U.S. Virgin Islands (5 days)
- Fort Lauderdale, FL (5 days)
- Charlottesville, VA (5 days)
- Pottstown, PA (5 days)
- Greenville, SC (5 days)
- Kansas City, MO (5 days)
- Toronto, ON (5 days)
- Montgomery County, MD – virtual
- Raleigh, NC – virtual
- Greenville, SC – virtual
- Kansas City, MO – virtual
- Washington, D.C. (two 5-day panels)
  - Downtown South
  - Shaw University
  - Austin, TX (two 5-day panels)
  - Parks and Open Space/10 Minute Walk
  - Capping I-35
- St. Thomas, U.S. Virgin Islands (5 days)

**Germany**

- Wolfsburg
- Stuttgart
- Munich
- Berlin

**Korea**

- Seoul, South Korea
- Daejeon
- Busan
- Gyeongju

**U.S. Virgin Islands**

- St. Thomas
- St. John
- Virgin Gorda

Key: In-person | virtual | follow-up workshop
Who Were the Panelists?
132 panelists participated this fiscal year.

- **62%** Men
- **38%** Women
- **53%** New
- **47%** Returning

Panel Scopes Covered the Following:

- **44%** Economic Development
- **44%** Revitalization
- **31%** Community and Inclusion
- **25%** Climate Resilience
- **19%** Housing Affordability
- **6%** Infrastructure & Transportation
Global Advisory Services Program
FY2020 Panel Highlights

Pomona, California

Date: July 7–12, 2019
Sponsor: Fairplex
Subject area: Fairground development

The nearly 100-year-old Fairplex, a 487-acre site that hosts the Los Angeles County Fair, is poised for a transformation to meet changing demographics and future market challenges. The fair attracts about 1.2 million fair-goers and provides a variety of other events that bring more than 3 million visitors to Fairplex annually.

The panel was invited to reimagine the site’s potential as an economic engine and year-round destination.

Read the panel’s recommendations in the final report
Washington, D.C.: Affordable Housing

Date: July 7–13, 2019

Sponsors: Office of the Deputy Mayor for Planning and Economic Development, District of Columbia Office of Planning, Department of Housing and Community Development, ULI Foundation

Subject area: Affordable housing

The panel made recommendations to Washington, D.C., Mayor Muriel Bowser on increasing the supply of affordable housing in the Rock Creek West Planning District, which includes Ward 3 and parts of Wards 2 and 4, and is one of the District of Columbia’s most affluent areas.

The panel assignment stemmed from the mayor’s plan to provide 36,000 housing units across the city by 2025, with 12,000 of those being units affordable for households with a low or moderate income. Panelists evaluated how to distribute the affordable units more equitably across the city, with a specific focus on placing units in the Rock Creek West area. They identified three main goals:

- Streamline and improve the development process;
- Gain community support—outreach, marketing, and education; and
- Create more housing.

Read the panel’s recommendations in the final report
St. Thomas, U.S. Virgin Islands

Date: August 25–30, 2019
Sponsors: Virgin Islands Housing Authority, Virgin Islands Housing Finance Authority, Virgin Islands Economic Development Authority, ULI Foundation
Subject areas: Housing, economic development and resilience, placemaking and mobility

An Advisory Services panel was asked to provide recommendations to the Virgin Islands Housing Authority and other government agencies regarding affordable housing and resilience on St. Thomas.

The panel provided recommendations on implementation of new recovery and resilience techniques, an equitable economic development vision, integration of the existing affordable housing stock into the surrounding neighborhood, and creation of a cultural theme to tie the area together. The recommendations also addressed the built environment, placemaking and mobility, and governance within the territory.

The panel's work builds on the work of an earlier ULI Advisory Services panel conducted in 2018 on St. Croix, which provided recommendations relating to boosting the island's economic development, creating affordable housing, and improving transportation links and resilience strategies.

Read the panel's recommendations in the final report.

The Paul M. Pearson Gardens property in the panel's study area, named for USVI's first civilian governor, who inspired the territory's first affordable housing effort.

Laura Magruder/ULI
Kansas City, Missouri

Date: December 1–6, 2019
Sponsors: Kansas City Parks and Recreation Department, The JPB Foundation
Subject areas: Parks and open space, 10 Minute Walk

The panel made recommendations to the Kansas City Parks and Recreation Department on the creation of an equitable park system and urban development strategies to address the racial legacy of the region.

The panel was conducted in conjunction with 10 Minute Walk, a national movement striving to ensure that residents of urban neighborhoods throughout America have access to a high-quality park within a ten-minute walk of their homes. Endorsed by more than 230 mayors, 10 Minute Walk involves a partnership between the Urban Land Institute, the Trust for Public Land, and the National Recreation and Park Association.

The panelists considered

- The primary factors the Kansas City Parks and Recreation Department should consider when aligning use of park resources and missions;
- How the parks system should incorporate community input in the design of facilities and open spaces to mitigate inequity;
- How the system can balance newer growth areas of the city to the north with deferred maintenance of existing, older parks south of the river;
- How the parks system can maximize its existing resources and partnerships to meet the needs of the community; and
- The best strategy for developing resources necessary to fulfill the department’s mission.

Read the panel’s recommendations in the final report

Ivanhoe Park. The panel envisioned a holistic investment strategy for parks to spur residential and commercial revitalization as well as build support for the park.

Bonnie Roy/ULI

Panel Chair
Carlton Brown
Direct Investment
New York, New York

Panel Members
David Abraham
Rice University
Houston, Texas

Karen Abrams
The Heinz Endowments
Pittsburgh, Pennsylvania

Kate Humphrey
City of Detroit
Detroit, Michigan

Emeka Moneme
Menkiti Group
Washington, D.C.

Bonnie Roy
SWT Design
St. Louis, Missouri

Allison Schapker
Fairmount Park Conservancy
Philadelphia, Pennsylvania
Austin, Texas: Capping I-35

Date: February 23–28, 2020
Sponsor: Downtown Austin Alliance
Subject areas: Transportation, corridor planning

The Texas Department of Transportation (TxDOT) is poised to initiate the schematic design and environmental study of the Capital Express Central Project, the reconstruction of about 10 miles of Interstate 35 through the heart of the city. The project will include the lowering of about three miles of roadway. The panel made recommendations on capping I-35 and ensuring a more integrated approach to corridor planning.

The panelists considered the following key areas:

- Enhancing multimodal access to bring more people into the urban core via transit and transportation modes other than driving;
- Meaningfully addressing affordability concerns and equity impacts in the area; and
- Creating a community vision for capping and stitching I-35 that represents the diverse voices involved in development.

Read the panel’s recommendations in the final report.

Panel Chair
Marilyn Jordan Taylor
University of Pennsylvania
Philadelphia, Pennsylvania

Panel Members
Amitabh Barthakur
HR&A
Los Angeles, California
Eliza Datta
E3 Development
Boston, Massachusetts
Connie Fan
LSG Landscape Architecture
Tysons, Virginia
Antonio Fiol-Silva
SITIO
Philadelphia, Pennsylvania
Kendra Freeman
Metropolitan Planning Council
Chicago, Illinois
Ilana Lipsett
Institute for the Future
Palo Alto, California
Michael Rodriguez
CBRE | Smart Growth America
Washington, D.C.
David K. Scott
DaVinci Development Collaborative
Atlanta, Georgia
Graduate Intern
Kelsey James-Kavanaugh
University of Texas at Austin
Austin, Texas
Toronto, Ontario

Date: February 23–28, 2020
Sponsors: City of Toronto, ULI Toronto, ULI Foundation
Subject areas: Affordable housing, sustainability

Aging, purpose-built rental apartment buildings are the backbone of the rental stock in Canada and are home to hundreds of thousands of households with modest or low incomes. More than 500,000 Toronto residents live in about 1,000 towers that are eight or more stories tall and built before 1985. Eight-five percent of these buildings are privately owned. One in three low-income families lives in these apartment towers. Toronto’s Resilience Strategy identified these buildings as an urgent priority for ensuring the city’s resilience, maintaining housing affordability, and ensuring adequate housing for lower-income populations.

The focus of the panel was to determine how the public and private sectors can work together to unlock the necessary investments and drive sustainable retrofits of Toronto’s towers while maintaining affordability. This panel was funded in part by the ULI Governor’s Fund.

The panelists considered the following:

- Retrofitting Toronto’s towers while maintaining affordability;
- Financing strategies to accelerate investment in deep retrofits for these buildings; and
- Next steps and priorities for the private and public sectors to address these problems.

*Read the panel’s recommendations in the final report*
Seoul, South Korea: Sewoon Sangga District

Date: October 13–18, 2019  
Sponsor: IGIS Asset Management  
Subject areas: Urban regeneration, housing, economic development, placemaking

When built in the late 1960s and early 1970s, Sewoon Sangga arcades were perhaps the most striking symbol of the emerging wave of economic development that would turn South Korea into a global economic powerhouse. In the late 1970s, however, the Sewoon District began losing its status as a prominent commercial hub.

A 2014 redevelopment plan recognized the importance of the Sewoon District's architectural and industrial heritage, and it was determined that the seven remaining arcade buildings would be preserved and renovated.

The panel was asked to explore the following issues:

• How to balance the need to create a modern, functioning commercial and residential district while also preserving the area’s cultural and historical integrity in a way that promotes Seoul’s objectives of creating a pedestrian, egalitarian, and healthy environment;
• How to retain and even strengthen the existing ecosystem of manufacturing and electronics industries in the district;
• How to alleviate the hardships for businesses that may be forced to relocate;
• How to identify and attract businesses and organizations that can improve the quality of the district;
• How to establish a system, such as a business improvement district, to oversee operations and ensure the district’s future success; and
• How generally to improve the 2014 plan.

Read the panel’s recommendations in the final report.

Panelists tour Seoul during the panel visit.

Panel Chair  
Wayne Ratkovich  
The Ratkovich Company  
Los Angeles, California

Panel Members  
Kate Bicknell  
Oxford Properties  
New York, New York  
Marty Borko  
ULI Los Angeles  
Los Angeles, California  
Olaf Cunitz  
Former First Deputy Mayor  
Frankfurt, Germany  
Scott Dunn  
AECOM  
Singapore  
Khoo Teng Chye  
Centre for Liveable Cities  
Singapore  
Ian Mackie  
LaSalle Investment Management  
Brisbane, Australia  
Patrick Phillips  
Former CEO, Urban Land Institute  
Washington, D.C.  
Greg Yager  
GW Design Consultant Group  
Shanghai, China  
Gary Yardley  
Capital and Counties Properties  
London, United Kingdom
Montgomery County, Maryland

Date: April 27–29, 2020
Sponsor: Montgomery Planning, a department of the Maryland–National Capital Park and Planning Commission
Subject area: Policy update review—school capacity and infrastructure funding

In April 2020, the Montgomery County Planning Department was in the process of updating its Subdivision Staging Policy (SSP), the document that guides the balance of the county’s growth with infrastructure. Montgomery Planning asked the Advisory Services program to convene a virtual Advisory Services panel (vASP) to review and provide recommendations on Montgomery Planning’s preliminary recommendations on the update to the policy’s schools element. The panel also provided a national perspective on best practices and resources related to policies that guide growth, infrastructure funding, and school capacity issues.

This vASP was ULI’s first such program executed in an entirely virtual format. It was created as a programmatic pivot in response to COVID-19 and is a complement to the existing advisory and technical assistance services offered by ULI.

Read the panel’s recommendations in the final report

Panel Chair
Glenda Hood
Hood Partners LLC
Orlando, Florida

Panel Members
Eric Fladager
City of Fort Worth
Fort Worth, Texas

Geoff Koski
Bleakly Advisory Group
Atlanta, Georgia

Heather Worthington
Worthington Advisors LLC
St. Paul, Minnesota

A school building in Montgomery County, Maryland.  
Shutterstock
Advisory Services Program Initiatives

In addition to their work on panels, Advisory Services staff members worked on key program initiatives in fiscal year 2020.

**Metrics and Impact**

Advisory Services is working to develop, collect, and assess program metrics to obtain a stronger understanding of program impact. This initiative is a result of the recommendations of the 2016 Advisory Services Task Force.

Consultants with Amplify for Change developed an impact evaluation framework for the Advisory Services program. Staff members are working to apply this framework to track metrics and program impact.

Main contact: Lauren Callaghan, director, Advisory Services, Americas

lauren.callaghan@uli.org

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Main contact: Lauren Callaghan, director, Advisory Services, Americas

lauren.callaghan@uli.org

**Partnerships**

Advisory Services is exploring a more intentional process for developing strategic partnerships. The focus is on better aligning and sustaining relationships with key partners to enhance the visibility of the program and the program’s efforts to provide leadership in the responsible use of land. Better leveraging these networks could enhance the program’s impact and provide additional touch points in the areas of executive coaching, policymaking, and project implementation.

Moving toward a strategic partnership, practice, and policy model for panel delivery will require a change in how panels are approached. Some of this change is occurring with the refocusing of the program on more of a mission-based rather than revenue-based model. Additional pilot programming can be conducted through existing grants like 10 Minute Walk and the JPMorgan Chase resilience grant.

Main contact: Kelsey Steffen, director, Advisory Services, Americas

kelsey.steffen@uli.org

A panel was conducted in Fort Lauderdale, Florida, this year with financial support from The JPB Foundation. The panel focused on enhancing parks and open space in the city’s urban core, including Huizenga Plaza.
Program Integration

As a key outreach program that embodies ULI's mission, Advisory Services creates member-delivered impact and value and is one of the organization's top global priorities.

The Advisory Services program for the Americas and the District Councils team are strategizing on how to better integrate and encourage collaboration on national and district council delivery of Advisory Services programs that will develop partnerships for services and strengthen the overall program. Areas of focus include convenings and cross-training opportunities, updated staff resources and procedures, updated program branding and marketing, and promotion of national metrics and data management initiatives to district council networks.

Main contact: Jacqueline Canales, director, Advisory Services, Americas
jacqueline.canales@uli.org

Systems

The Advisory Services program is improving its internal data management, systems integration, and standardizing procedures to strengthen the end-to-end delivery of panels. This includes improving panelist recruitment, business development, project management, and impact evaluation.

Main contact: David Zehr, senior associate, Advisory Services, Americas
david.zehr@uli.org

Support Advisory Services through The Fund for ULI

You can help Advisory Services reach future partners by contributing to the program through The Fund for ULI. For more information about the extraordinary impact of Advisory Services and to contribute to the advancement of ULI’s mission through our program, please visit the ULI Foundation.
FY2020 Technical Assistance Panels

Thirty-eight district councils currently run a technical assistance panel (TAP) program. In fiscal year 2020, 16 district councils convened 38 TAPs.

**FY2020 TAPs**

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<tr>
<th>District council</th>
<th>Focus</th>
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<tr>
<td>ULI Arizona</td>
<td>Town of Gilbert</td>
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<tr>
<td>ULI Atlanta</td>
<td>10 Minute Walk—Atlanta Community Schoolyards</td>
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<tr>
<td>ULI Boston</td>
<td>Wareham • Maynard • Weymouth • Brockton</td>
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<td>ULI Charlotte</td>
<td>City of Asheville</td>
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<td>ULI Cincinnati</td>
<td>Village of Lincoln Heights • Cheviot • Golf Manor</td>
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<td>Village of Glendale • Bond Hill &amp; Roselawn Exchange m-TAP*</td>
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<td></td>
<td>Walnut Hills (former Kroger site) m-TAP*</td>
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<td>Price Hill Will Tower site m-TAP*</td>
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<tr>
<td></td>
<td>West End Freeman Avenue Corridor m-TAP*</td>
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<td>Real Estate Accelerator Lab 2.0 m-TAP*</td>
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<td>ULI Indiana</td>
<td>Community Alliance of the Far Eastside (CAFE)</td>
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<td>Decatur Township</td>
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<td>ULI Kansas City</td>
<td>Overland Park Convention Center Catalyst</td>
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<td>ULI Los Angeles</td>
<td>L.A. Bio Med • Community Hospital Long Beach</td>
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<td>New Horizons</td>
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<td>ULI Minnesota</td>
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<td>ULI Philadelphia</td>
<td>10 Minute Walk—National Study Visit in Camden, New Jersey</td>
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<td>ULI New York</td>
<td>Bronx Community Board 4, NYCFC Stadium</td>
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<td>ULI North Florida</td>
<td>Northwest Jacksonville CDC</td>
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<td>ULI North Texas</td>
<td>Ash Creek • Fort Worth Northside • Forest District/St. Philips</td>
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<td>Alice Branch Greenbelt</td>
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<tr>
<td>ULI Northwest</td>
<td>Tacoma Dome District</td>
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<td>ULI Orange County/Inland Empire</td>
<td>Anaheim • Santa Ana–YLG TAP</td>
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<td>ULI San Francisco</td>
<td>Brentwood • San José • Morgan Hill</td>
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<tr>
<td>ULI Washington</td>
<td>North of Massachusetts Avenue (NOMA) district</td>
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<td></td>
<td>Rockville, Maryland</td>
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*ULI Cincinnati is pioneering m-TAPs (mini-TAPs) as part of its Real Estate Accelerator Lab (REAL) program.

For more information on ULI’s District Councils visit, americas.uli.org/councils/district-councils/
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**Asia Pacific**

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Manager, ULI South Korea

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