

# Tap Into TAPS

## *How to Advance Your Project with ULI's Technical Advisory Panels*



September 10, 2015

# Agenda for Today

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1.



Pete Sechler – ASLA/AICP  
*Director, Community  
Solutions Group, GAI*

**Overview TAPS: Basic Facts**

2.



Carla Coleman –  
*ULI Florida Director  
SE TAPS Local Coordinator*

**Case Studies from South Florida**

3.



Eric Swanson–  
*Odebrecht - Director of  
Real Estate Development*

**The Consultants' View**

4.



Dori Stone –  
*Planning and Community  
Development, City of  
Winter Park*

**Benefit to the Public Official**

5.



**What Does It All Mean?  
Discussion Common Themes**

# What are TAPs?

- Technical Assistance Panels
- Unbiased, practical ideas & best practices on land use and sustainable development
- Usually organized for local government
- Panel comprised of 5-10 ULI members skilled in issues presented in that TAP/ 1 to 2 days
- Deliverable includes written report, PowerPoint, and presentation



# Onsite Convening for TAP

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- Background material sent to panelists in advance
- Onsite tour of study area
- Meetings with stakeholders
- Onsite workshop with Team
- Time to work on recommendations



# How it Works with ULI

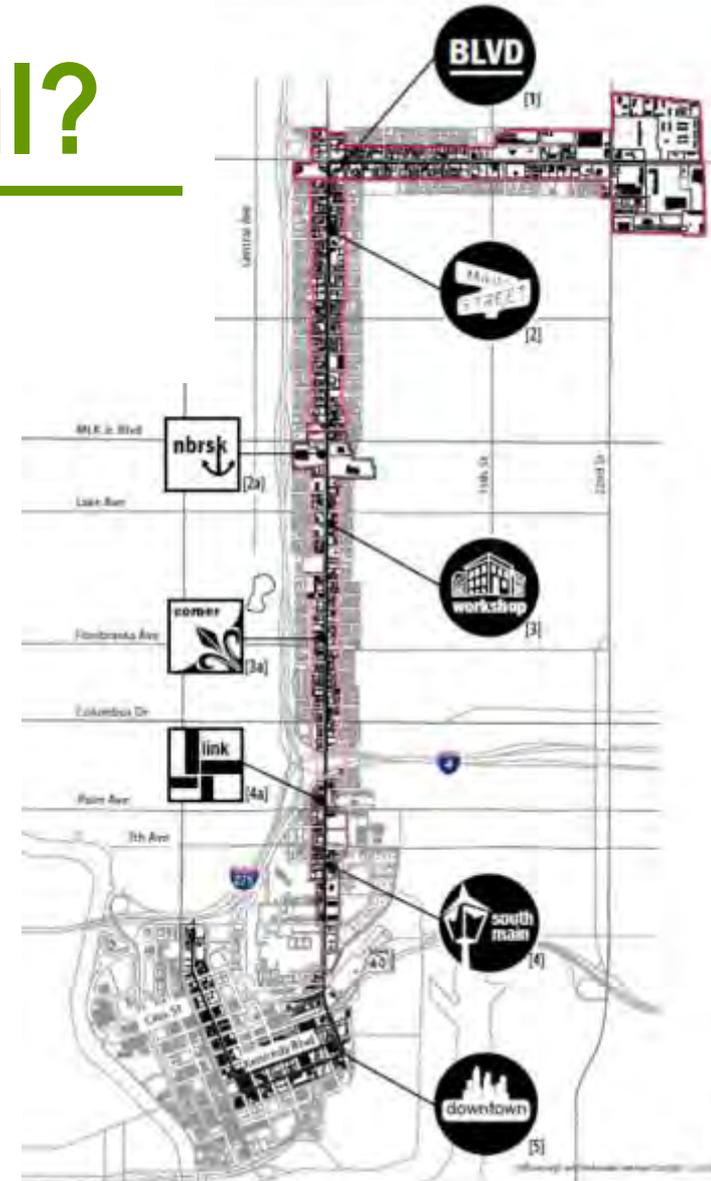
- Cost – \$15k to **\$25k**. To ULI, Product Production + Team Expenses
  - *Professional time / expertise is donated*
- Days – 1 to 2 days plus prep and documentation
- TEAM – Selected per Assignment, as appropriate, from our network of ULI public, private and institutional members
- Prep – mission definition, visit, mapping and data prep, approach prep
- Product – written report with strategic suggestions, framework / vignette level design



# When are TAPs useful?

- Redevelopment corridors
- Housing issues, market and affordable
- Public/private partnerships
- Resiliency impacts
- Connecting land use and economic growth
- Mobility and connectivity issues
- Transit-oriented & transit-ready site evaluations

**Your community's next development challenge!**



# When are TAPs useful?

## Examples

As an illustration of how the strategies are implemented, a block along the corridor can be made over with a set of improvements shown here:

- |                                  |                                    |
|----------------------------------|------------------------------------|
| [1] Existing Block Condition     | [11] Balance Retail Units          |
| [2] Proposed Block Condition 1   | [12] Landscaping                   |
| [3] Proposed Block Condition 2   | [13] Store Signs and Clear Windows |
| [4] Proposed Block Condition 3   | [14] Film Street Tree              |
| [5] Murals                       | [15] Painted Bike Lanes            |
| [6] Street Festival              | [16] Buffer                        |
| [7] Facade Upgrade               | [17] Building to the Sidewalk      |
| [8] Incubator Space              | [18] On Street Parking             |
| [9] Co-Op Workspace              | [19] Street Furniture              |
| [10] Front Yards Retail Concepts |                                    |



The policy changes the existing parcel structure adjacent neighborhood

A series of property im building/shop owners and potentially incentivized by the City, makes a positive change to the private realm, while street trees, bike lanes, and streetscaping improves the public realm.

Finally, a series of programs brings out people to make the place more active and generates business for the surrounding shops. None of these improvements in isolation will be as effective as the combination of several small initiatives.



# How it Works with ULI

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## ULI North Florida

Kirk Wendland

Office of Economic Development, City of Jacksonville

[kwendland@stellar.net](mailto:kwendland@stellar.net)

## ULI Central Florida

Pete Sechler

GAI Community Solutions Group

[p.Sechler@gaiconsultants.com](mailto:p.Sechler@gaiconsultants.com)

## ULI Tampa Bay

Geraldine Campos Lopez

Director, Economic Development & Housing, City of Clearwater

[Geraldine.Lopez@myclearwater.com](mailto:Geraldine.Lopez@myclearwater.com)

## ULI Southeast Florida/Caribbean

Carla Coleman

Florida Director, The Urban Land Institute

[carla.coleman@uli.org](mailto:carla.coleman@uli.org)

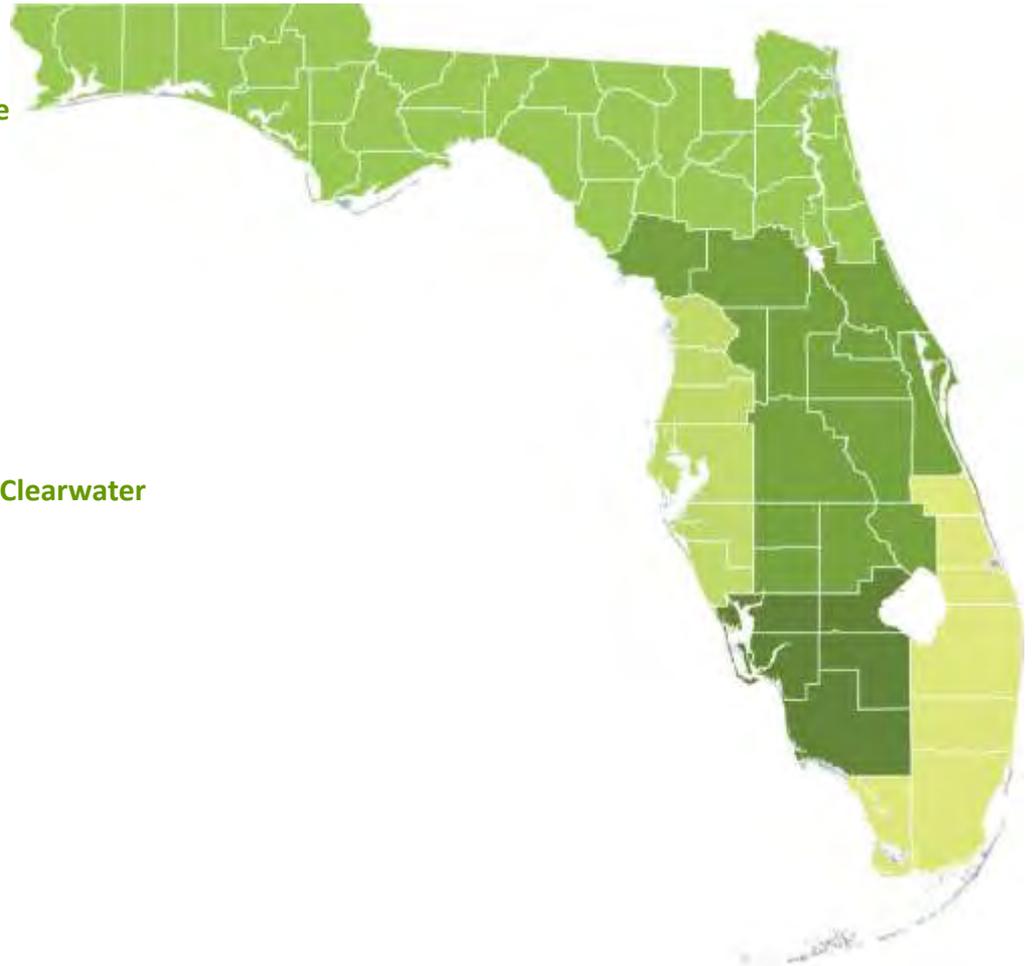
## ULI Southwest Florida

Jan-Erik Hustrulid

Business Development Coordinator

Owen-Ames-Kimball Company

[jhustrulid@oakfl.com](mailto:jhustrulid@oakfl.com)



# National and Local TAPs

- **COST** - \$75-\$150K
- **TIME** – 5 day workshop, 3-9 months work
- **LEVEL of DETAIL** – comprehensive strategic planning
- **Large Scale Mission Definition:**

Tampa Center City Plan 2011  
(InVision Tampa)

St. Petersburg Downtown Waterfront Master Plan - 2013

Longboat Key – October 2013

**Both have their Place**



ULI Advisory Services

## Helping Communities Help Themselves

Experts Providing Practical Solutions for Complex Land Use Issues

The photograph shows a group of people gathered around a table, looking at a large map or plan. They appear to be in a meeting or workshop setting, discussing the map together.

Since 1947, advisory services panels have helped find creative, practical solutions for some of the most challenging issues facing today's urban, suburban and rural communities.

- ▷ Get timely, candid and unbiased input from expert land use professionals.
- ▷ Kick-start critical conversations and move beyond deadlock.
- ▷ Gain fresh insights and discover innovative solutions to the most complex real estate development challenges.

Panels bring together the best and brightest from ULI's diverse membership including developers, planners, financiers, market analysts, economists, architects and public officials to provide practical and candid advice that is not available from any other source. We work with local governments, private developers, community development corporations, and many other organizations to address the most challenging real estate and land use issues facing communities today.

[www.uli.org/advisoryservices](http://www.uli.org/advisoryservices)

To inquire about convening a panel in your community, or to serve as a panelist, contact Tom Etler, Vice President, Advisory Services at 1-202-624-7186 or [etler@uli.org](mailto:etler@uli.org).

# Eric Swanson with Carla Coleman: South Florida Case Studies

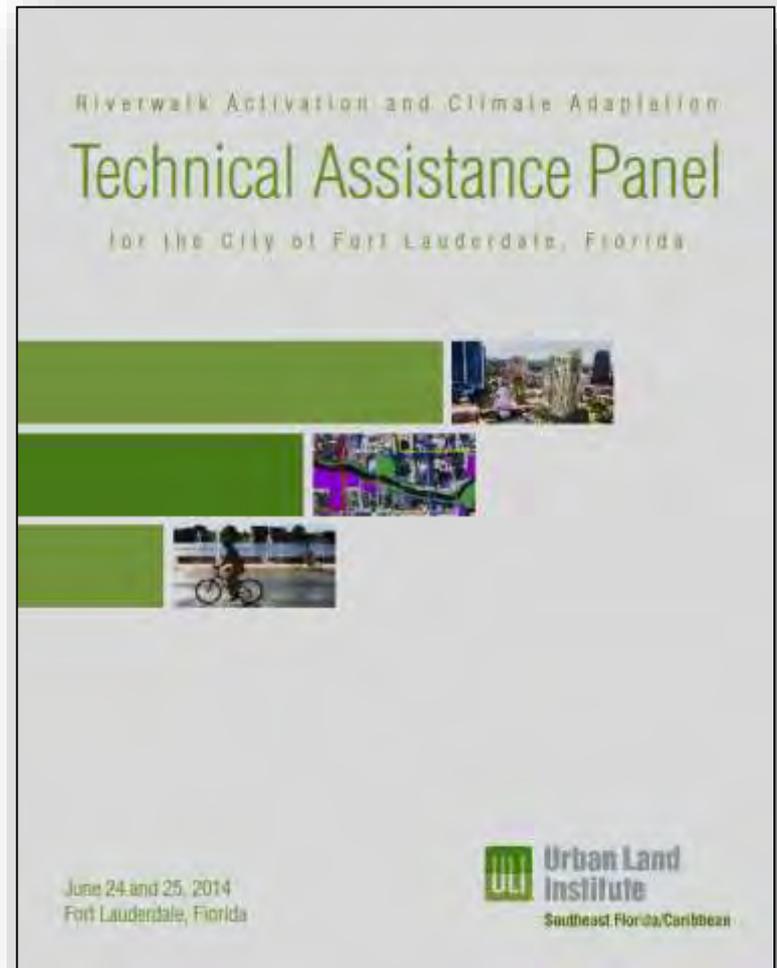
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## Development Site Example: Deerfield Beach

- CRA & privately owned parcels
- Development & parking issues
- Public park component

## Corridor/Resiliency Example: Fort Lauderdale

- Completion strategies for downtown riverwalk along both sides of New River
- Resiliency and rising water issues
- Partially funded by Kresge Foundation



# Deerfield Beach - 2011

- Study site outdated shopping center on Intracoastal plus passive park on opposite side of Hillsboro Blvd. bridge
- Panel diverse group of developers, planners, park experts and market analysts.



- Outcomes included site plan & park sketches, P3 strategies, parking finance
- Park being built & proposals for hotel under consideration
- Parking garage; pathway connecting parcels

# Fort Lauderdale Riverwalk

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*“This is the blueprint we needed to move this project forward.”* Fort Lauderdale Mayor Jack Seiler

- Strategies for activation
- Strategies for adaptation
- Worked closely with staff on technical issues

- Riverwalk – publicly funded spine through downtown Ft. Lauderdale
- Some parts have worked better than others – still lacks connectivity
- Rising water now an issue
- Panel included a coastal engineer



# Eric Swanson: The Consultants' View

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## Factors for Success

- Panelist Selection
- Schedule
- Team Dynamics
- Value of Recommendations



# Prep for a Successful TAP

- Developing TAP Questions
- Contract/Agreement
- Client Team – who's in charge from public side?
- Promoting Public Sessions



- Assuring elected 'buy in'
- Public participation
- Who's responsible for what?
- A typical agenda for a one and a half day TAP

# Panelist Selection

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- Tie panelist expertise to TAP questions
- Best in class access
- No conflicts with projects or bids in the jurisdiction
- Generally, Florida-based but not always
- Need a mix of local knowledge and objectivity



# Why Panelists Volunteer

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- Part of ULI's Code of Ethics to 'give back'
- The mission of ULI is important to its members:

*"To provide leadership in the responsible use of land and in creating and sustaining thriving communities"*

- Incredible way to learn more about host locations
- Opportunity to get to know other professionals in the real estate sector – terrific opportunity to expand the network
- Panelists often feel they get more out of the exercise than the client



# TAP Day One

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## Prior to arriving:

- Panelists have background information from the client that has been read, preparing them in advance
- Arrive with an open mind, but have some idea of the issues and potential solutions before you start

## Listen and Learn:

- Lunch with staff
- Tour of site & surrounding area
- Meeting with the public & community leaders
- Dinner with elected officials & staff



# TAP Day Two

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- “Locked” in a room to craft recommendations
- Panelists divided into teams to deal with the questions
- Pressure packed day to compose preliminary recommendations & presentation by 5:00 pm
- End day with presentation to the public



# Dynamics of Panel Negotiations

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## How does the Panel get there?

- **Focus:** The natural tendency is to solve all of the issues – but it's critical to focus on the immediate questions
- **Open Mind:** Great minds are on the Panel – must listen to all points of view
- **Delegation:** Chair quick and decisive, there is no time for ambivalence – discussion yes, but discussion must lead to clarity (Panelists want success!)
- **Find the Solution:** The hardest part is usually to decide what the answer is – but need to get to it quickly
- **Resources:** Great Panel selection will dictate how good the research and justification of the solution will be



# Value of Recommendations

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## TAP helps move projects forward:

- Provide a solution that had previously not been considered
- Reinforce a solution that has previously been considered – providing objective analysis
- Can provide a roadmap that is sometimes hard to find “...can’t see the forest for the trees”
- Idea generation – not a design plan...not meant to replace need for professional expertise

*“This has been eye-opening for me. I did not realize adaptation was an alternative.*

*I thought our only option was to bolster against the rising and storm waters.”*

*Fort Lauderdale  
City Commissioner  
Bruce Roberts*

# Dori Stone: Benefit to Public Official

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Winter Park and TAPS – *A Relationship that Works: 2 Examples*

Building Ownership: Gateway / Fairbanks

Defining an Approach: Citywide Visioning



# The City's View

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Winter Park has used the Technical Assistance Panel approach for two distinctly different issues

- The first involves a major corridor into the city addressing both the human element through disenfranchised property owners and the physical element – a state-managed road that provides a corridor into Winter Park
- The second is a true community planning effort – preparing a scope for a citywide visioning process that is both inclusive and efficient



# TAP's Panelists

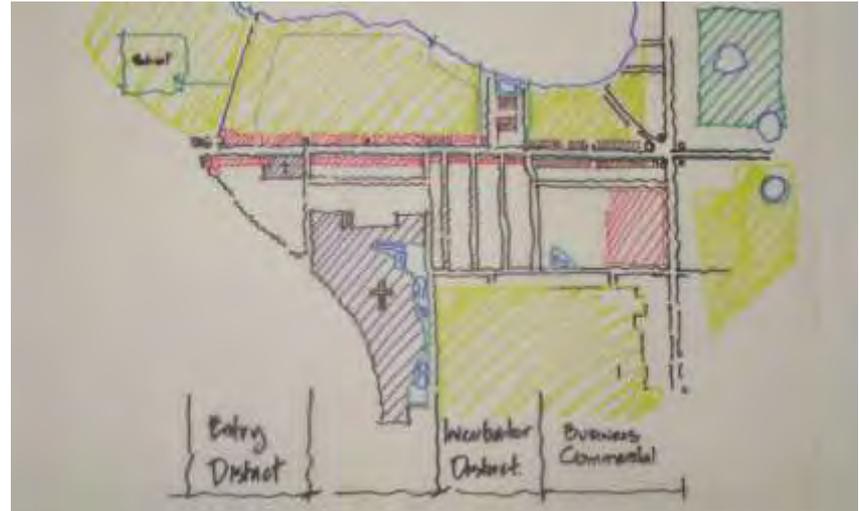
- Brought Diverse Expertise
  - Urban Design
  - Real Estate
  - Finance
  - Redevelopment
  - Legal
  - Local Government  
(former elected official)
- Asked to do a lot in a short timeframe
  - West Fairbanks – 2 Days
  - Visioning Scope – 1 Day



# West Fairbanks Corridor Plan

## Background and Objectives

- Market Demand
- Catalysts for Change
- Incentives
- Urban Design / Land Use Regulations



# Inclusive Public Process

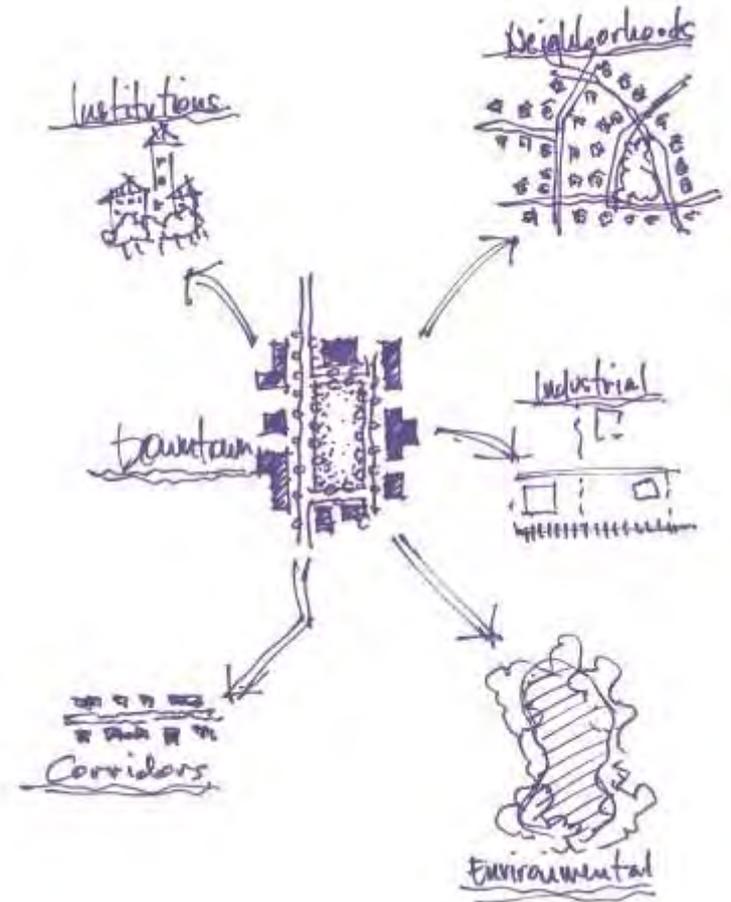
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- Panelists met with stakeholders along corridor during data collection and input stage
- TAPs panelists present in front of Commission and community
- Important to share findings with community
- Stakeholders needed to feel that their work had results
- Timely follow-through is important to success!



# Winter Park City Visioning Process

- Leaders wanted to craft a vision that all parts of the city can share — a vision that takes into account the rich diversity of the community and is inclusive of each area's residents and businesses
- Commission divided on approach
- Brought in ULI TAPS to determine how the city should undertake the initiative of creating a new vision for Winter Park.





# Process and Results

- TAPS created themes for the process:
  - Gathering input on the vision
  - Defining the vision
  - Language/messaging
  - Steering committee
- Final document included recommendations to create a visioning scope that was inclusive and educational
- City Commission adopted recommendations and the process is underway

Phase 1: A Community-Developed Process



defining the process and our initial thoughts

Phase 2: Communicated Through Community Advocates



basin our vision on what we love

Phase 3: Where Are We Now? Where Are We Going?



re-evaluating our vision based on future trends

Phase 4: Where Do We Want to Go?



making our key choices

Phase 5: How Do We Get to Our Destination?



reviewing our vision

Phase 6: For the Love of Winter Park Vision



inspiring people to take the next steps

# Local Government Perspective

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- With proper scoping, TAPs can offer recommendations for many types of planning and community development options
- TAPs members are unbiased and offer a “fresh” perspective
- Consensus by elected officials to agree to the panel, be part of the final process and consider the recommendations is important UP FRONT
- Work through community concerns about ULI and development bias - Winter Park panelists have all been from outside the region

# What Does it all Mean: Takeaways

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Flexibility for all Types of Issues

Objectivity and Fresh Eyes

Public and Private View

Defining Difficult Subjects

Initiating Community Dialogue



**Setting  
you up for  
Success**



# Your Questions about TAPS



ULI North Florida  
Kirk Wendland  
Office of Economic Development, City of  
Jacksonville  
[kwendland@stellar.net](mailto:kwendland@stellar.net).

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Pete Sechler  
GAI Community Solutions Group  
[p.Sechler@gaiconsultants.com](mailto:p.Sechler@gaiconsultants.com)

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