

Technical Assistance Panel (TAP) Agreement

SAMPLE

The Indiana District Council of the Urban Land Institute ("ULI") agrees to provide a Technical Assistance Panel ("TAP") to _____ ("Sponsor") in (date) to address issues relating to the future land use in the Study Area, defined as _____ ("Study Area"). Specifically, the Sponsor would like the following questions addressed:

(3-5 questions)

The following is the scope of work, deliverables, and associated costs for the TAP. Should the contents of this letter be consistent with your expectations, please return a signed copy to ULI Indiana at your earliest convenience. A fully executed copy will be sent back to you for your records.

SCOPE OF WORK

ULI INDIANA

- 1) Pre-Panel (4-12 weeks)
 - a. Work with Sponsor to define expectations, shape questions and target dates.
 - b. Identify expertise needed from Panelists; recruit panelists from ULI Indiana and surrounding District Councils; identify a TAP Chair. The draft scope is based on 5 panelists, including the TAP Chair.
 - c. Work with Sponsor to identify expertise needed for the TAP panel to interview ("Stakeholders"). The draft scope is based on three group interviews.
 - d. Work with Sponsor to plan for tour of study area and on-site logistics and finalize agenda. The draft scope is based on a full day from 7:30am-5:30pm including working breakfast and lunch.
 - e. Make any adjustments needed to scope and get contract approved by both parties.
 - f. Compile briefing book & aerial maps, with assistance of Sponsor as needed.
- 2) On-Site (1 day)
 - a. Conduct the panel, with the help of Sponsor in coordinating on-site logistics.
 - b. Provide a TAP writer to take notes on panel deliberations and recommendations, so they may take the lead in preparing the final report.
- 3) Post Panel (6 weeks)
 - a. Write panel report, obtaining input from Panelists and Sponsor as necessary.
 - b. Issue final report within 6 weeks of completion of the TAP.

SPONSOR

- 1) Reserve meeting space(s) for the Panel.
 - a. A private room is required to provide privacy for Stakeholder interviews and Panel deliberations. The room should be large enough to accommodate up to 20 total people (up to 12 for each Stakeholder interview, in addition to 5 Panelists, TAP Writer, and ULI staff).
 - b. A separate area is desirable for transitioning the Stakeholder interviews and for food set-up.
 - c. The Presentation to the Sponsor, at the end of the day, may take place in the same room or elsewhere. Projection ability will be required.
- 2) Assist ULI Indiana in identifying any preferred area food vendors and with food and room logistics.
- 3) Lead the Sponsor/Panel Briefing at the beginning of the day. This includes identifying, inviting and confirming key participants, as well as preparing them for the event.
- 4) Provide transportation for Study Area Tour to accommodate five Panelists and TAP Writer, as well as tour guides and others from Sponsor team.
- 5) Review draft report for accuracy prior to publication.



DELIVERABLES

Within six weeks after the TAP has been completed, a written report summarizing the Panel's comments and recommendations will be provided to the Sponsor in electronic format (pdf file) and 10 printed copies.

FEE FOR SERVICES

ULI Indiana charges a \$10,000.00 fee to cover administrative overhead, briefing books, TAP Writer fees, 10 final reports, and food and beverage provided during the work day. Panel members volunteer their time and services at no cost, as a service to ULI. The Sponsor is required to cover the costs of meeting room(s) and site tours.

ULI requires 50% payment at the time the contract is signed and 50% upon the Sponsor's receipt of the final report.

ULI Indiana

Name

Title

Date

ULI Indiana
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Indianapolis, IN 46220
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(e) uli.indiana@uli.org

Sponsor:

Name

Title

Date

[Name]
[Address]
[City, State, Zip]
(p)
(e)

DELIVERABLES AND SCHEDULE

TAP Work Day

7:30-8:45am	Sponsor/Panel Briefing & Continental Breakfast
9-10:15am	Site Tour (conducted by the Sponsor)
10:30-11:15am	Panelist Private Discussions & Break
11:15am-2:00pm	Stakeholder Interviews/Working Lunch (Panelists may eat in briefing room; food may be provided to Stakeholder interviewees outside the briefing room as desired.)
Group 1: 11:15-12:00	
Group 2: 12:15-1:00	
Group 3: 1:15-2:00	
2:00-4:30pm	Panel deliberations; panel develops presentation for Sponsor
4:30-5:30pm	Presentation to the Sponsor

TAP Report

Based on information gathered and presented during the TAP, the TAP Chair and the TAP Writer will draft a formal report to the Sponsor for delivery 6 weeks following the TAP presentation. During the drafting process, Panelists may be called upon for additional thoughts or suggestions and are certainly encouraged to participate in the process as they are able.

(Optional) Publicity/Public Presentation

Sometimes a TAP Sponsor prefers for their TAP to be kept discreet, other times they desire publicity to draw attention to their community or the study area. The TAP Sponsor should review these potential options and let ULI Indiana know their preferences.

Decisions to Make Prior to the TAP (will be reflected in scope/contract):

- **Publicity:** The Sponsor should indicate to ULI Indiana whether they wish for the TAP to be advertised. If yes, ULI Indiana will promote that the TAP is occurring in our usual updates about the District Council via email and social media. ULI Indiana can also write and distribute a press release on special request.
- **Public Presentation:** If the Sponsor would like for the presentation of the Panel's findings to be public, this will require additional logistical support and, possibly, additional fees.

Decisions to Make Following the TAP (prior to final payment):

- **Publicity:** After the Sponsor has received the TAP findings and recommendations from ULI Indiana, the Sponsor may indicate to ULI if they wish for there to be any advertisement of the TAP conclusions/final report. If yes, ULI Indiana will promote the post-TAP findings in our usual updates about the District Council via email and social media. ULI Indiana can also write and distribute a press release on special request.
- **Public Presentation:** After the Sponsor has received the TAP findings and recommendations from ULI Indiana, the Sponsor may indicate to ULI if they are interested in having the TAP process and results presented in a future public presentation. ULI Indiana will work with the Sponsor to determine if this can be accommodated in an existing ULI Indiana event or if a special event needs to be scheduled. Special events would be subject to additional negotiation and may require additional logistical support and, possibly, additional fees.