Global Strategic Plan (FY19 – FY22)
Global Strategic Plan: Executive Summary

1. ULI Members deliver ULI mission impact and create ULI’s content.

2. ULI Members want more connection and engagement, and we need to support that effort.

3. ULI needs a state-of-the-art human and technology platform with shared business infrastructure to ensure a sustainable global ULI.

4. ULI must move away from annual budget process to a multi-year strategy for ensuring a sustainable and strong program of work.

5. ULI four-year Global Strategic Plan is proposed to invest in our members, to grow our mission impact, to build a platform for leadership and knowledge sharing, and to create a philanthropic culture for the Institute.

6. The ULI Foundation plays a fundamental role in realizing the strategic vision of the Institute by growing the endowment to support transformative mission-impact offerings.

7. The plan elements are underpinned with defined measures of success.

8. To move ULI to this next performance level, an investment is needed.

9. The plan remains within the ULI Reserve Policy.

10. Risk management and monitoring systems are built into the plan with Global Board oversight.
WHY STRATEGIC PLAN?

1. We undertook Global Evolution Initiative to provide a structure to enable a sound regional platform (governance, accountability, self-sufficiency).

2. We listened to our Members and they told us they want to be more connected to ULI and each other, get more involved, and make a measurable difference.

3. Our Mission is more relevant than ever and there significant opportunity for a more powerful mission impact on a global scale.
Global Board Tenets

- We are committed to ULI as a **global** organization, as laid out in our **mission**.
- We accomplish our mission through our **members’** efforts.
- We are the keepers of ULI’s strong reputation and **brand**.
- We have **fiduciary responsibility** for ULI, its financial security, and sustainability.
- We are responsible for **listening to our members** and delivering on their needs in the program of work.
- We want to inspire a **philanthropic culture** at ULI, with members contributing their time, talent, and treasure to strengthen the Institute and its future throughout their careers.
- We need a **long-term, multi-year strategic vision** for ULI to deliver greater mission impact.
The Strategic Plan vision, endorsed and supported by the Global Board, must:

- Focus on Member Development, Engagement, and Impact. ULI is its members.
- Enable our Members and Key Leaders to get involved, give back, contribute, and make a difference in this world.
- Build a strong Technology and Shared Services platform to enable member connections to members, ideas, and opportunities, and a dynamic library of our work.
- Protect and enhance the Brand.
- Derive a more diversified yet more connected global organization, with three self-sustaining regions.
- Be able to measure our impact.
- Grow the endowment at the Foundation to increase our sustained ability to advance the mission.
Vision: delivering the mission, as our members impact cities and communities around the world

Members’ engagement drives more mission impact and is measured in a clear and consistent way
- Members involved in thousands of opportunities to learn, volunteer, and lead
- Members can easily connect to members, opportunities, and ideas on a global platform
- Key Leaders, network leadership, and corporate members are treated as partners in a true relationship management way

Institute as a sustainable globally connected organization with state-of-the-art platform
- Stronger pricing model and self-sustaining revenue base, projected significant endowment, greater depth, and meaningful presence globally
- Enabled state-of-the-art human and technology platform with shared business infrastructure

A culture of philanthropic support to sustain our mission, engaging, members to give back for generations to come
- Investments in Advisory Service panels, UrbanPlan, and other key ULI mission impact programs
- Philanthropic giving ingrained in lifetime membership journey

Our Global Brand—and its impact—is recognized, elevated, and connected around the world
Invest in Members, local networks, and National and Product Councils to execute the mission on a local, national, regional, and global basis.

Grow and measure globally relevant Mission Impact through offerings, such as Advisory Services and UrbanPlan.

Build global platform for Corporate Accounts, Leadership, and Knowledge Sharing.

Focus on a stronger and more sustained financial foundation for the Institute.
Technology

- **Strengthen** existing Membership System and expand Navigator
- **New** Contact Management
- **New** Member Wall
- **New** Knowledge Sharing Platform

Governance

- Strengthen **Governance** structure ensuring the strategic plan implementation is supported by the proper rules of engagements and connections

Business Operations

- Expansion of the **Business Operations** to support execution of the strategic plan in terms of logistics, human resources, and accounting

Shared Services Investments

Summary

Investments in technology and infrastructure are needed to upgrade the existing global platform, support regional growth strategies, enable economies of scale, and implement a best-in-class knowledge sharing capability to enable connections, sharing, and learning across all members, networks, and regions.
Enhanced Member Development model that better matches programs and services to ULI member needs

- Revamp membership categories to align with how members want to engage with ULI
- Move content behind a member wall to increase membership value and enable new “online only” membership
- Instill philanthropic giving by integrating the Annual Fund into membership experience
- Build corporate account relationship platform to facilitate seamless and integrated experience

Greater Member Engagement that realigns Americas’ sources and uses of funds to provide more opportunities for more members to get involved, share, and contribute

- Create Network Leadership program to provide thoughtful and ongoing support for the leadership of major networks (PCs, DCs, juries, Centers and Initiatives, demographic and diversity groups)
- Invest in and expand Product Council and District Council networks
- Build on successful launch of Key Leaders program and integrate this group with ULIF capital campaign
- Engage with Key Leaders and utilize the Navigator to have more engaged members

Stronger focus on advancing ULI’s mission and measuring the resulting Member Impact

- Expand reach and impact of Advisory Services, UrbanPlan, and other programs of work
- Integrate the Centers into network delivery
- Embrace member-as-primary-source-of-content model and redesign Centers and Initiatives
- Create metrics and measurements to look back and forward to measure impact
The plan is composed of five major elements:

**Membership**
- Develop and grow membership (individual and corporate) as the main, stable revenue source

**Leadership**
- Become better known as the European multi-disciplinary real estate and land use knowledge network that leads in applying big ideas to business practices and identifying emerging trends.

**Structure and Networks**
- Further develop the National Councils and Product Councils and open up the opportunities for cross-fertilization because they are fundamental to Europe’s member engagement

**Products and Programs**
- Focus on mission-driven activities, such as UrbanPlan and Advisory Services, as ways to distinguish ULI from other nonprofit organizations and increase member engagement

**Financial Performance**
- Establish a financially resilient, self-sufficient platform for sustainable growth

The common objective for all activities is growing membership, especially corporate membership:
- To enhance member engagement and retention
- Increase ULI’s impact
- Make the organization more resilient, especially in a downturn

**SUMMARY**
The common objective for all activities is growing membership, especially corporate membership:
- To enhance member engagement and retention
- Increase ULI’s impact
- Make the organization more resilient, especially in a downturn
Localization at the National Council level
- Enhancing member engagement in our existing National Councils
- Focusing on China as the premier market for growth and scale

Connectivity and ecosystem at the Regional level
- Strengthening the Asia Pacific platform

Branding, technology, and services at the Global level
- Leveraging global investments to drive efficiency and consistency

Key initiatives for the region:
- Elevate the Key Leaders program and process – APEC, Trustees, corporate member leaders, government officials, diversity
- Drive corporate relationships across region in a targeted approach, engage leaders to recruit and prospect
- Grow the Asia Pacific Summit and regional conference program
- Improve the inter- and intra-regional connections among global, regional, and local
- Strengthen platform with new staff resources in corporate affairs, member engagement, marcom, events, and Advisory Services

The Strategic Plan is a road map to achieve ULI Asia Pacific’s key goals for the next four years:
- Financial independence
- Member engagement at the local level
- Significant presence in China
- Strong regional organization
Vision: The Foundation plays a fundamental role in realizing the strategic vision of the Institute by inspiring members’ philanthropy to support ULI’s measurable and transformative impact offerings worldwide.

A strong Foundation enables ULI to pursue its mission and tackle big ideas through economic cycles.

Goal: Grow ULI Foundation Endowment

Inspire a philanthropic culture at ULI with members contributing their time, talent, and treasure to strengthen the Institute and its future throughout their careers, in support of ULI’s measurable and transformative impact offerings:

- Advisory Services panels and TAPs
  - Infrastructure
  - Disaster recovery
  - City resilience
- UrbanPlan (high school, university, public officials)
- Awards (Best Practices)
- Professional Development (best practices)
- Centers
  - Housing
  - Sustainability
    (Greenprint/TEOP, Resilience, Building Healthy Places)
  - Capital Markets
  - Public Sector
- Fellows