



**Urban Land  
Institute**

**Product Councils**

# **ULI Product Councils Leadership Resource Manual**

## **Traditional Best Practices**

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## Overview

The following best practices are a compilation of training materials from Council Leadership events, letters and memos from Counselors and best practices from other organizations. The best practices are presented as a series of excerpts and are meant to provide ideas and a potential roadmap for Council Leadership to ensure success in their Councils. Many Council teams function differently from one another, and we encourage you to use any or all of the examples included in this document to help you be a more effective leadership team.

### Introduction to Running a Council

Doug Abbey wrote an excellent letter to Council leadership to address the following: 1) what makes the Council experience special; 2) expectations for each member of your executive team; and 3) what you can gain from your experience as a leader in ULI. Permit some homilies from Doug's letter:

- A. The more I put into ULI, the more I got out of it (like most things in life).
- B. The leadership skills developed at ULI have been transferable to business, non-profit and inter-personal activities.
- C. I became a better Chair through sharing ideas and best practices with my peers.

We all know a good Council when we see it. The magic to a successful Council is creating “emotional connection.” The virtuous circle starts with wide participation, candor and sharing, which leads to trust, which leads to community, networking and business collaboration outside of Council meetings. Councils are at their best when members share their mistakes and fears as much as their triumphs. Time and time again “**mistakes made and lessons learned**” and “**real deals and real numbers**” are the highest rated sessions.

### Leadership Training

Rather than let leadership skills rely upon happenstance, ULI is committed to developing leadership talent. Over the last 12 years we have had a series of training sessions. A prerequisite to becoming a Council Chair is attending a leadership training session. There are four goals for training:

- a. The Basics (“Boot camp” for incoming council chairs) – the nuts and bolts of how the draft works, roles and responsibilities of leadership team, etc.;
- b. Recruitment outside the draft
- c. How to run an excellent Council Day;
- d. Team building; and
- e. Personal development and leadership skills.

Training sessions are scheduled each Spring and Fall in conjunction with ULI's semi-annual meetings.

## The “Contract”

Councils work best when members show up, stay all day, participate, are open and candid, and lastly, have fun. In contrast, if people are checking smartphones, don't show up, leave halfway through the day or don't share, then the Council experience is lessened for all. Many successful Council Chairs have formed a “contract” with Council members. It could be in the form of a letter at appointment time (see attached) or simply a statement at the beginning of Council Day. It's all about respect for our fellow Council members and making the most of our limited time together.

Let me share Gadi Kaufman's experience. At his first meeting as Chair he said, “Council membership is a privileged experience and in return you need to abide by three simple rules:”

1. “Show up at least 3 out of 4 times and stay for the entire day (if you need to leave early, let me know in advance)”
2. Share your ideas and experience”; and
3. Everything in the room is confidential” (a necessary pre-condition to getting people to abide by Rule #2.

Gadi passed around a sheet with the rules and asked each person to either sign or leave. In his programming for that day, he asked several industry leaders to make a special effort to share information that was both confidential and had high “take home value.” I asked Gadi what he did the following year for new Council members. He said nothing. He had created emotional connection and community.

## Create Your Own Traditions

One way to build camaraderie, enthusiasm and commitment is to, as Council Chair Trish Healy puts it, create your own traditions and culture. One Council was called the “Aloha” Council where there was a prize for the best Aloha shirt and derision for anybody wearing a tie (mostly investment bankers from New York). Dave Twardock, at IOPC-Green, held a predictions contest ranging from interest rates to World Series winners, which always gets a laugh at the beginning of Council Day. Some Councils pick a “loud mouth” referee to issue Red and Yellow cards for “egregious self-promotion, lack of candor or excess pontification.”

## Council Day Programming

To have “gang buster programming,” maestro Jim Curtis, suggests starting to plan for the next meeting at the end of Council Day. Some Chairs may have a brief roundtable session devoted to topics for the next session. Jim suggests you get together with your leadership team to critique the day's activities and begin to put together the next session. Most Council Chairs orchestrate several conference call planning sessions where ideas are flushed out and an agenda is assembled. The work doesn't stop there. Good moderators arrange a conference call with their speakers to make sure that the format and content are

down pat. A good moderator will also review slides to make sure they are few but effective (specific as to real deals and real numbers, slides with take-home value, no promotional content, etc.).

## Council Cooperation

Most Councils have multiple flights (IOPC, RDC, UDMUC, CRC, CDC, MFC, PPPC, RNDC and SSDC). Several of these groups have instituted brief monthly conference calls (typically 30 minutes at pre-set times) with whomever can attend among the top three leaders in each Council to discuss a variety of issues including:

- Council agendas
- Joint sessions
- The reception
- Membership recruitment and the draft

They have found that cooperation leads to better programming and group events, and supports leadership succession. For example, Chairs share their best programs which are often “repotted” to other Councils six months later. This planning helps build teamwork and leadership succession.

## Marketing

It is not enough to have a great program; like anything else you have to sell. E-mail is a very effective format used by Council Chairs to build interest, particularly for the Spring where attendance is lower. Getting the word out early is a good way of motivating members to commit to the Spring Council Forum. It is also important to meet deadlines. If you want your Council members to show up they need to know that the program is going to be worth their investment of time and money.

## Getting the Most Out of Your Council Day

The best advice I ever received was that a member’s “take-home value” is a function of how much “air time” they had during Council Day. Said differently, when Gerry Bell does his training he talks about being in “alpha” state where you are engaged, ready to learn and focused, as opposed to “beta” state where your mind is scattered over a myriad of subjects. I listed 25 or more Council members on my agenda. People love to see their name in print. For example, for roundtables I would appoint moderators who are less likely to speak up during the session. **Give everyone a job so they feel important. Keep track of who has not talked and make sure by the end of the day you have called on everyone.**

## Hosting Skills

Being a Council Chair has been analogized to being a daytime talk-show host, fight promoter, Broadway producer or Hollywood director. Clearly, Council success is dependent upon the Chair’s leadership skills. Luis Belmonte, in his inimitable style, suggests Chairs need to have good “hostess” skills (think Katherine

Graham). What makes a great dinner party or salon? Of course it is the host or hostess. Here are the skills according to Luis:

- ✓ **Invitation:** Getting the right mix of people in your Council, as with a dinner party, is the key to success. That doesn't mean inviting just the smartest or most famous people. It's the chemistry that counts, people who are willing to interact.
- ✓ **Setting the Table:** Make the setting as pleasant and productive as circumstances allow (seating arrangements, flip charts, AV equipment, etc. Gerry Bell suggests having a few chairs less than the expected attendance to create the sense of "scarcity." The last person to arrive will need to draw up a chair from the perimeter.
- ✓ **Meeting and Greeting:** The human touch in interactions throughout is what puts people in a comfortable frame of mind. When you are at ease, you are willing to share, listen, have fun and learn. A good host makes guests feel welcome. Council Leadership teams should stand near the door in the morning and greet Council members as they enter the room.
- ✓ **Empathy:** A good host has empathy. He/she truly cares whether you have a good time. We're not even talking here about take-home value or intellectual activity. We are talking about emotional connection.
- ✓ **The Conversation:** A good host is highly skilled at drawing out every guest, gently changing the subject, deftly getting a pompous windbag to stop talking (without their even noticing it). They know who to seat next to whom and arrange for a seating change between courses so everyone has a chance to get to know someone they didn't already know.
- ✓ **Please and Thank-You:** These two most important words in the English language are forms of praise, which is the greatest motivator available. Everyone who contributes to the success of the meeting should receive recognition and unstinting praise.

## Moderating

There is an art to being a good moderator. The best job moderating I have ever seen was Jack Cohen on an after-lunch CMBS session (about as boring as I could imagine). He started off asking the audience what they wanted to get out of the session. (Needless to say there was plenty of humor mainly having to do with getting lots of money). Jack engaged his audience and focused the speakers on what the audience wanted to learn. The Council session was driven by Council members' concerns rather than the presenters. The more conversational you can make the session, the better. Remember, Gerry Bell says **don't let anyone talk more than 5 minutes!**

Before a session I would approach several Council members who I knew would have interesting comments and other Council members would want to hear from. I would intersperse questions to these industry leaders with the panel, making the session participatory and “spontaneous.”

## **Gerry Bell Techniques**

If there are 50 people in the room and one person is speaking, that is 2% participation. Gerry recommends stopping and asking everybody to share thoughts with their neighbor. Suddenly audience participation goes to at least 50% supporting the adage that ULI members are in either of two modes – “talking or waiting to talk.” If you see that a session is flagging, then it is your responsibility as moderator or Council Chair to interrupt the session and get people talking to each other. And you must develop techniques for shutting off a boring or self-promoting speaker (red and yellow cards work well).

## **Ending the Day**

Needless to say, if you can get a strong session to close the day, you are more likely to keep your members. The best end-of-the-day session I’ve witnessed was Trish Healy’s IOPC-Red. Trish asked everyone to share with a neighbor three things they learned which had “take-home” value. I initially thought it was a bit “hokey”, but lo and behold, it got everyone involved, provided an opportunity for humor and was a terrific way for Council members to provide testimonials to take-home value. In short, this session validated the value-added experience. Of course, this gave guidance for planning the next meeting. No member would miss the closing session!

# **Council Chair & Leadership Team Best Practices**

## **Building a Great Council Leadership Team**

A successful council depends on a strong Council Leadership Team, with Team being the operative word. The Leadership team must be a group of people who communicate well and have mutual goals for the council.

1. Responsibility for a great Council Day starts and stops with the Council Chair; become familiar with the responsibilities of each leadership team member.
2. Select people for each role that have unique skills/experience. Help make them successful in that role. For example: Many consultants who have broad contacts across the entire industry can make excellent Membership Vice Chairs and can recruit great new council members.

3. Select committed, passionate council members for each leadership position and make sure that each member of your leadership team understands their roles and the time commitment and expectations associated with it.
4. Use diversity and young leaders in your leadership team to broaden the perspective and programming and to build future leadership.
5. Consider creating a list of questions to use as a “guide” when choosing a member of your leadership team:
  - Are they enthusiastic and excited to be chosen?
    - a. Are they willing to do the work needed and are they dependable?
    - b. Do they have time to devote to the role?
    - c. Do they have a passion for ULI and respect for council tradition?
    - d. Do they know what makes a good council day program?
    - e. Can they command respect from the council members?
    - f. Have they earned their stripes through contribution and participation
    - g. Do they have good contact lists?
    - h. What unique industry experience do they have?
    - i. Are they a risk taker?
    - j. Are those you select for your leadership team complimentary to your skills? Diverse in perspective? Strong where you are weak?

### **Working Effectively Together as a Council Leadership Team**

Once you have the right Council Leadership Team in place, create a system that fosters a sense of camaraderie through regular communication and a competitive spirit to be the best council you can be.

1. Regular Communication/Calls. Example: 1<sup>st</sup> Thursday of each month at 8:00 PST.
2. Meet after each council day to review: Make a specific list of what worked and what didn't. Re-evaluate the programming to see what can be learned about the format, speakers and learning principles.
3. Make a list of 3 ideas to implement immediately: assign specifics “To-Do’s” to each leadership team member and follow up to ensure that they get implemented.
4. Try holding a leadership retreat with your leadership team outside of council day. It can be as short as a 2-hour meeting or a dinner or breakfast during the Spring or Fall Meeting, or it can be a focused 1-day meeting between meetings. It will greatly accelerate your leadership planning and progress.

5. Leadership training is a key to the success of your team. Encourage your entire Leadership Team to attend at ULI council leadership meetings and leadership training.

## Create and Implement a Leadership Succession Plan

1. Cultivate leaders early on and have an action plan for succession.
2. Get council members involved in council day planning and programs to cultivate future council leaders.
3. Keep track of which council members most actively and productively participate in council, volunteer for panels and programs, help with receptions, etc. Write them thank you notes, keep them engaged.
4. Build a leadership “farm” of interested council members by talking to your council members about council leadership and the “succession” process from council leadership to broader leadership at ULI. The Council Leaders you are selecting are the future leaders of ULI.
5. Select future leaders carefully. Don’t assume automatic succession up the ladder, especially for the next Chair. Who would be the best person for the leadership role? Consider other members of the leadership team, members of other flights or other leadership teams. Do not be afraid to make changes.

## Cooperation Between Multiple Council Flights

1. Most councils have multiple flights (Red, Gold, Silver, etc). They have found that cooperation among flights leads to better programming, group events, a better Draft and supports leadership succession.
2. For example, Chairs share their best programs which are often “replayed” on another council at a different time during the council day or at the next council meeting.
3. Several of these groups have instituted brief monthly conference calls (typically 30 minutes at pre-set times) with the Chairs plus whomever can attend among the top three leaders on each Council Leadership Team to discuss a variety of issues including:
  1. Council Day agendas
  2. Joint sessions
  3. The reception
  4. Membership recruitment and the draft

## Marketing the Meeting to Your Council Members

Create demand for each council meeting by promoting it in advance. E-mail is a very effective format used by Council Chairs to build interest, particularly for the Spring where attendance is usually lower. Getting the word out early with exciting specifics about the program (and the reception) is a good way of motivating members to commit to the Spring Council Forum. The Spring Meeting is also a good time to schedule Council field trips to relevant projects.

It is also important to meet deadlines. If you want your Council members to show up they need to know early in advance that the program is going to be worth their investment of time and money.

## Communicate with Your Council Members

1. By communicating with your council members regularly you can help them feel that they belong to a group of 50 people who have the same interests and concerns as they do. Communication facilitates a feeling of collegiality and trust which is essential to any great council day. Clearly and cogently explaining the rules, and responsibilities which come along with the privilege of being a council member gives people a feeling of deeper importance and more impact.
2. Communicate with Council Members regarding their Council responsibilities
3. Communicate with Council Members regarding Spring and Fall Meetings
4. Use your leadership group to contact and befriend members prior to meeting to help foster networking and also gives a deep base for questions and discussion during council day when you know what each member is currently working on. Try asking specific questions related to the upcoming council day program to get council members thinking and prepared ahead of time.
5. Create a directory of council members, which could include photos and bios.
6. Use technology to foster connections beyond council day programming. Can be listserve, bulletin boards, e-mails, etc.
7. Provide Networking information for Council Members. Try to provide additional information/calls/meetings throughout the year that can be done via the Internet or conference calls.

## Create a New Member Integration Plan

1. Assign a council leader or other council member to mentor each new council member to call and welcome them to your council and discuss the function, norms and rules of your council and to answer any questions they may have.
2. At Council Day meetings and receptions match new council members with council leaders or other council members to welcome them, introduce them to other council members and facilitate networking.
3. After their first Council Day meeting, assign a council leader to call each new member to ask how their Council Day experience was and be sure that it was productive and ask for future council day program suggestions.
4. Choose either Spring or Fall to have your leadership team host a New Member breakfast or dinner to make them feel welcome and to get to know your new members better.

## Communication

### Communication with Council Members

#### Five Key Types of Communication

1. Communication with Leadership Team regarding their responsibilities

When: Early July

Why: Ensure each leadership team member knows their responsibilities and what is expected of them

Why: Establish the expected schedule of conferences/communications for the team

How: Typically via teleconference; some have gotten together physically.

Who: Council Chair

2. Planning Communication with Leadership Team

When: Typically monthly; in the twelve weeks before Council Day; if get started later should communicate either weekly or biweekly.

Why: Ensure that the agenda for Council Day is fully thought out and planned (Tim will want a draft of this two months before Council Day)

Why: Ensure that lessons learned from Council Day are discussed (done in the month after Council Day)

Why: Ensure that the administrative items of the Council (ULI Foundation, Membership Development, Social Interaction, Inclusivity, Program Committee) are discussed and managed.

How: Typically via teleconference, and a personal meeting right after Council Day is helpful.

Who: Council Chair

### 3. Communication with Council Members regarding their Council Responsibilities

When: July of each year

Why: To ensure that Council Members understand the expectations regarding their Council Membership (participation, contribution, frankness, attendance, ULIF participation, membership development)

Why: Explain use of the Council and member sections of uli.org

Why: To set expectations regarding communications from the leadership team

How: Typically via email

Who: Council Chair

### 4. Communication with Council Members regarding Semi Annual Meetings

When: 3 months, 2 months, one month and two weeks prior to Council Day

Why: To let members know the plans for the upcoming meeting

Why: To help build interest for the meeting

Why: To gauge probable attendance levels (typically in the 2 mo, 1 mo and 2 week communications, ask for response regarding attendance for dinner/reception and council day)

Why: Remind members to check for updates in the Council section of uli.org

How: Typically via email

Who: Council Chair; parts may be delegated to Assistant Chair.

### 5. Networking information for the Council

When: Two months prior to the Fall Council meeting

Why: To provide an “ice breaker” among council members to allow greater networking outside of Council Day

How: Via a handbook; using the sharepoint website for council members only

Who: Membership vice chair

## Conclusion

A structured method of communication provides a higher probability of a successful council experience.

## Council Membership

## Creating the Perfect Council Mix

Like a great dinner party, a council becomes most engaging and informative with a well thought out and constructed mix of members. Great council leaders understand this dynamic and actively recruit a diverse mixture of members who can inform, challenge, inspire, and socialize well with their council peers. A strong membership makes a strong council (the reverse is also true!)

- A. Recruit 4 to 5 “stars” to your council that will create a buzz that will make others want to be on your council. This is hard to do and does not necessarily come off of the council wait list. Most often it involves going outside of ULI to find these personalities and then romancing them into the benefits of the council experience and ULI.
- B. When creating the council mix the council should have a high percentage of developers on it. Currently the grid guidelines recommend 60% developers with a minimum target of 50%. Within that mix it is important to have geographic, age, gender, and ethnic diversification.
- C. Be sure that every “niche” within the business is represented on the council. Do not be afraid to recruit from non-traditional pools (City Managers, Mayors, Clergy, Heads of Conservation groups) particularly for the grid that encompasses academic and governmental members. Not only can they provide insight but they can become ardent supporters of positive land use solutions.
- D. Evaluate if the members currently on the council (or those you are considering) have real passion for the council, the industry and ULI. Avoid social climbers like the plague. Focus on those who are absolutely willing to share both their positive and negative experiences.
- E. Drop non-participating council members and those who are only willing to take information rather than give.
- F. Don’t sacrifice quality for quotas. In doing so, be attentive to mix, particularly the developer percentage. If all you can find are 20 great developers, limit the council to 40 members until you can raise the number of practitioners rather than having a 50-member council with only 40% developers.
- G. Leave a slot open on the council to insert a “maverick” onto the council.
- H. Use your own company or council members companies as prototypes on how to add diversity to your council. What programs do they use, what is working, what is not working.
- I. Use your wait list as well as outside sources to build your council to be sure you are getting a good quality of members as well as diversity of members.

- J. Do not be afraid to bring members on mid-year if they are good or to over-stock the membership by doing so. Having the ability to winnow out a council's marginal performers at draft time and still ending up with a full council is a great place to be.
- K. Participation in council dinners/receptions is just as important as being there on Council Day. The socialization aspect of Council membership is the long-term glue that keeps council membership strong and enables relationships to expand beyond twice per year. Those relationships are the reason people stay with their council and ULI over the long term.

## Recruiting New Council Members

- A. The three key ingredients for a strong council are strong and active leadership, provocative and informative council day programming, and a cast of members who are engaged and sharing. With regard to the latter, recruiting and retaining engaged and sharing council members is very important.
- B. The Vice Chair for Membership and the Council Chair have to be engaged in the industry on as broad a scale as possible in order to identify new council members. By proactively recruiting, rather than relying just on a wait list, the council has a higher probability of having a stronger membership.
- C. Have specific industry leaders targeted and a strategy for how best to reach out to them and recruit them. For Example: Who on your council (or other flights) is best connected to this potential recruit?
- D. Assign specific responsibilities and To-Do items. Follow up on progress during regular monthly calls. Don't wait until the draft to discuss recruiting, by then its too late!
- E. Tap into the District Council leadership and members for potential council members. District Councils are proving to be great source material for Young Leaders and diversity.
- F. The bottom line is that an active and engaged Membership Vice Chair is just as important as a great Assistant Chair. If either fails, the Council will not be all it can be. If both succeed, you will continually create high value magic for your council members.

- G. The Council Chair should interview prospective members either in person or over the phone to ascertain personally whether the person understands the benefits and obligations of council membership. This step is key to holding members to those responsibilities and gives the high ground in the event a future termination is required for not participating in the council to the full extent expected.
- H. Use “Guest Slots” to recruit and get to know potential new members.
- I. Encourage your council members to bring guests that are potential council members. An outsider viewing a well-run council meeting is the best form of marketing you can employ to entice them in.
- J. Encourage guests to attend your council’s dinner and reception. The networking is great and you can quickly judge how the person seems to interface with your council.
- K. Encourage your council members to participate in their local District Council programs and to note what Product Council they belong to. Relationships built at these events logically lead to invitation as a guest at a council meeting.

### **Take the Mystery Out**

Make sure that your members and particularly your Membership Vice Chair know the process for being a guest, being a ULI full member and being a council member so that prospective members have someone who can guide them through these processes.

## **Council Day Best Practices**

### **Planning a Successful Council Day**

Try to leave a ULI conference with the majority of your next program planned, but save time for cutting edge issues that might arise. Make a hard and fast rule with your Assistant Chair to never, never allow a speaker that no one you know and trust has heard and can provide a solid recommendation. **Try to utilize the expertise in the room for presentations.**

- A. Start the process early. Many councils start the planning for the next meeting before the end of the current meeting.
- B. Create a program planning system with regular planned communication with the Council Leadership Team (e.g. monthly conference calls)

- C. Spread the responsibility of the programming out among the council leadership group. Assign specific responsibilities to each member of the Council Leadership Team and follow up to be sure they are getting done.
  - 1. Have a clearly defined purpose. Be specific about what the take home value is that you intend to provide. Know what success looks like and have clearly defined outcomes or success criteria for the meeting
  - 2. Know what it will take to reach those outcomes
  - 3. Communicate success as you reach them
- D. Have a specific agenda and detailed description of the programs early in the process. A clear, detailed agenda will guide your thoughts and planning.
- E. Developing relationships is one of the most valuable components to the council experience. Be sure that you have time for introductions, ice breakers, discussion between members and networking.
- F. Establish who the “gatekeeper” will be for your meeting
  - 1. Give them the authority to keep the group on task and on time (a timer with an alarm is sometimes useful)
  - 2. Let everyone know the unique role the “gatekeeper” will play and expect others to respect that role
  - 3. The Real Deal: the red card/yellow card story. (someone keeps yellow and red cards to either warn or stop a speaker for self-promotion or talking too long)
- G. Engage people in the process. People will support things when they are part of the process
  - 1. Have your Council Leadership Team members participate as much as possible.
  - 2. Reach out to members of your council as panel members, presenters, moderators and respondents.
- H. Preview all speakers and presentations ahead of the council day.
  - 1. Tune their comments/presentations to the needs and desires of your council
  - 2. Avoid surprises (poor content, off topic, promotional content, excessive length)
- I. Try to provide take home pieces (handouts) or email presentations to members after the council day.

- J. Plan for the worst, hope for the best.
  - 1. Walk the room (or have a member of your leadership team walk the room) prior to the meeting. Also check/confirm the breakfast and lunch catering arrangements.
    - a. Make sure your meeting room and facilities (especially AV) are set up to your specifications
    - b. Know how to work the AV set up and the lights.
    - c. Know where the restrooms are
  - 2. Get all presentations together on a single laptop prior to the Council Day.
  - 3. Have a back up plan for any and all failures (especially AV, speaker “no-shows”)
- K. Other Ideas to add value to Council Day:
  - 1. Create special seating for councils at plenary sessions.
  - 2. Create “add on” programs in addition to the regular council day to extend the experience.

## Moderation Summary

- A. 3 to 4 speakers, max! Many Councils only have one for a deal presentation
- B. No introductions other than name and company
- C. Try to keep sessions to no more than 45 minutes, 10-15 minutes of which should be the presentation. The rest of the session should be interactive Q&A
- D. No talking heads
- E. Get the presentation in advance. Some Council leadership also have the presenter do a run through over the phone with their slides
- F. Meet before the session, some weeks prior, by phone, to explain rules of the road, expectations, types of questions, flow of Q&A and to solicit 3 questions from each participant that they want asked of them or asked in general
- G. Control who your speakers are. Do not accept “friends” over talented extemporaneous speakers.
- H. Compile questions up until the session begins. You can never have too many questions.
- I. Two days before the session, email your speakers the universe of questions you may use.
- J. No one ever knows which question will go to which panelist or in what order.
- K. Just before kickoff, determine the order, flow and location of your questions.

- L. Aggressively move the questions around. Rarely give more than one speaker the same question. Start slow and easy to get people warmed up and then pick up pace and content.
- M. Use an easel to:
  - 1. Draw the audience out – participation.
  - 2. Find helpful ideas and questions.
  - 3. Find the troublemaker in the audience.
  - 4. Get a level of understanding of the audience’s intellectual grasp of the topic.
  - 5. Give speakers time to calibrate, gather, and grasp the audience.
- N. Start and finish on time.
- O. Good speakers are flexible and prepared. They are humorous and have fun.
- P. Goal is to break any barrier between audience and the speaker.
- Q. A successful council day is about interaction. What makes for a great session is one where the lines between audience, moderator and speaker blur and then disappear. It only works if you can draw the audience to the speaker and vice versa. This means “going after people” in a good humored manner.

## What Makes A Great Council Meeting?

- A. Create a program planning system
  - 1. Start the process early.
  - 2. Chair acts as facilitator of the process.
  - 3. Encourage regular conference calls.
  - 4. Spread the responsibility of the programming out among the council leadership group.
  - 5. Use your “future” leaders as part of this group to turn to for assistance and support of the program chair.
- B. Throughout meeting offer opportunities for introductions among the council.
- C. Personalize the process as much as possible.
- D. Offer engaging and “take home” value programming.
  - 1. Make the time spent at the council worthwhile.
  - 2. Whenever possible be sure to have speakers include “mistakes made/lessons learned” as part of their presentation.
  - 3. Encourage speakers to be open and honest in their presentations. Evolutions of programs consistently note that the greatest take home value comes from presenters who “tell it all” (i.e. profits, losses, mistakes made, items to change, etc)

- E. Supply speakers with presentation guidelines as well as tips for presenting.
- F. Use a color card “times up” system.
  - 1. One color can denote that the presentation is too much of a “commercial”
  - 2. One color can signal their time is up.
- G. Use adult learning principles when delivering programs.
  - 1. Remember adults learn differently and need varied delivery techniques to keep their attention.
  - 2. Mix up your format, use roundtables, hollow square, engaging audio visual, handouts, etc.
- H. Create opportunities for council members to be engaged in the programming and to be included on the agenda.
- I. Speaker selection is key to success of a council meeting.
  - 1. Resources for possible tried and true good speakers: other council programs, outside speakers that someone has seen in action.
- J. Evaluate programming and modify future programs based on feedback. Share evaluations with speakers so they may know what worked and what didn't.
- K. Inspect your meeting room and reception/dinner facility prior to the meeting to be sure it will meet your needs.
- L. When conducting tours as part of your council programming be sure to: visit site prior to event, make tour interactive, and include guides on bus. Keep in mind the cost of the bus for tours held in conjunction with council day programming is funded by ULI.
- M. Review other council day programs and agendas for ideas, speakers, format, etc.
- N. Use the “nay sayers” as part of the solution, involve them in developing future programs.

## Council Day Review

- A. Did you use “Gerry Bell” techniques to encourage Council members to talk to each other (remember that when one person is talking that is 2% participation and when you have a one-on-one, the participation increases to 50%!)?
- B. Did any speaker go on longer than five minutes?
- C. Did your council members stay with you until the end of the day?
- D. Did you wrap up with a discussion of take-home value and ideas for next meeting?
- E. Did presenters use real deals and real numbers and discuss mistakes made and lessons learned?
- F. Did you get 80% of council members to participate?
- G. Were council members “outspoken, candid, provocative and challenging”?

## Top 10 List: What makes a Great Meeting?

- 10. Make sure your meeting rooms and facilities are set up to your specifications prior to the event.**
  - ✓ Ensure the layout will work for your event and that all technical needs are met and working
  - ✓ Have a back up plan for any and all failures
- 9. Have a clearly defined purpose and agenda for your meeting**
  - ✓ Your time and the time of your team members is valuable, use it wisely
  - ✓ A clear agenda will guide your thoughts
- 8. Ensure the right people are there and that they will have the opportunity to get to know each other**
  - ✓ It is difficult to move ahead when decision makers are missing from the meeting
  - ✓ Developing relationships is the key to getting work done, make time to make this happen
- 7. Establish who the “gatekeeper” will be for your meeting**
  - ✓ Give them the authority to keep the group on task and on time
  - ✓ Let everyone know the unique role the “gatekeeper” will play and expect others to respect that role
- 6. Know what success looks like**

- ✓ Have clearly defined outcomes or success criteria for the meeting
- ✓ Know what it will take to reach those outcomes
- ✓ Communicate success as you reach these

#### **5. Engage people in the process**

- ✓ Have team members participate as much as possible
- ✓ People will support things when they are part of the process

#### **4. Be flexible enough to change your agenda or direction as needed**

- ✓ Be prepared for things to go “not as planned”
- ✓ Take what you are given and make it work to your advantage

#### **3. Encourage open and honest communication during your meeting**

- ✓ This will allow greater trust and respect for individuals and ideas
- ✓ You will rarely learn the truth without this principle

#### **2. Know who your “champions” are and lean on them when you need support**

- ✓ They will help you in difficult times
- ✓ Involve them both formally and informally

#### **1. Lead – When all else fails, lead your team**

- ✓ People will be looking to you for leadership
- ✓ Bring order out of chaos

### **Council Chair Tips for the Next Meeting**

- Insure leadership team is deep and committed (and please consider ULI diversity goals).
- E-mail to communicate with Council and leadership team.
- Delegate responsibility for Council Programming. Monitor progress.
- Schedule conference calls with Leadership team to prepare for the next meeting.
- Make sure that presentations are properly rehearsed so that there is no misunderstanding as to what is to be covered.
- Meet designated deadlines so that your members are well informed regarding programming
- Plan a good reception offering networking opportunities and good value for money spent.

H. Compare notes with Council Chairs of other flights regarding content and “best practices”.

## Council Dinner Best Practices

Graciously shared by Jill Hatton with UDMUC

Following is a checklist summary of suggestions when planning your ULI Council Dinner. Please note these are suggestions although they reflect the experiences and lessons learned of many Council Chairs and dinner plans.

### Site Selection

- A. Team Members - Engage a local Council member if possible in your Council Dinner planning team. Also reach out to ULI for the ULI contact that will provide assistance with planning, contracts and payment. A suggested third critical team member is a strong administrative assistant or Analyst that can coordinate development and sending emails, collecting RSVPs and guest payments.
- B. Review historical attendance patterns with past Council Chairs. In most cases you will be able to estimate within 20-25 people.
- C. Assemble a list of sites with sufficient space for reception and dinner accommodations for the estimated group. Most popular locations have been those with unique cultural or historic attributes (i.e. Fenway Park, museums).
- D. It is strongly suggested that either a Council member or ULI visit the selected site and participate in room layout and planning.
- E. Once a site is selected, coordinate contract execution and deposits with ULI representative. (Please note that ULI will sign contracts and make payments to utilize its liability coverage as well as to take advantage of sales tax exemptions, if applicable.)
- F. Determine if bus transportation is desired, remembering that mobility is a concern for some members. Buses can be coordinated with ULI and should include 2 departures from the main convention site and a return trip that stops at the various convention hotels.

### Invitations and Payments

- A. Once a location, date and time are confirmed an email should be sent to all Council Chairs so they can inform their members if they so choose to on the event.

- B. Email invitations should be sent via ULI blast email 2 months prior to the event. The invitations should include a header that highlights a response is required. For example IMPORTANT PLEASE READ - APRIL 14, 2010 XXX JOINT COUNCIL RECEPTION INVITATION – Your Response is Requested
- C. The invitation can reflect the creativity of your admin or Analyst (sample attached) and should include date, time, location (ideally with a web link) and transportation information. Highlight that the Council Member cost is included in the Annual Council Dinner Fee and that Guests may attend for a stated fee. Transportation details are important and one of the most frequently asked questions.

- E. In addition to the initial email blast, follow-up emails should be sent 4 weeks and 2 weeks prior to the event. It is recommended you provide an RSVP deadline that is 2-3 days prior to the date you need to provide a final count to the caterer as 15-20 people typically RSVP after the deadline.
- F. Using the RSVP responses, create 3 copies of an attendance list and use for check in at the door the evening of the event.
- G. In the past, we have offered local MBA students or Analysts in the area to attend and check in our members in exchange for attending the event.

## Reception and Menus

- A. Depending on the logistics of the room and the desires of the various Councils, either a sit down dinner or buffet stations will follow a reception. Please allow a minimum of one hour for the reception as attendees may arrive late and this portion of the event is typically the most valued networking portion of the evening.
- B. Plan for sufficient beverage servers – for example at the 300 person UDMUC events we typically plan for 3 bars with 2 servers at each for at least the first 90 minutes of the event. As guests arrive it is suggested that wine and beer be available by servers as attendees enter the reception. It is suggested that at least one bar remain open until the end of the event.
- C. Selections of top shelf liquors and 3-4 higher quality wines can typically be arranged with the caterer and are highly valued by the attendees.
- D. Heavy appetizers are suggested to be passed during the cocktail hour – select a range of one or two higher end appetizers supplemented with a few other modest priced selections.
- E. Cheese and vegetable crudités are typical although in most cases they are not heavily utilized. If your budget allows and you are in a coastal region, seafood stations are popular and can be utilized as both appetizers and as part of the buffet food stations during dinner.
- F. If you are planning a sit down dinner allow for a bread/roll item, salad and dinner plate that includes two meat selections, a starch and vegetable that reflect the location specialty.
- G. If you are planning a buffet, select one or two higher end items (i.e. a sirloin carving station with roasted potatoes) and average your cost down with complementary stations such as a Caesar salad station with roasted chicken breasts nearby and/or a pasta station. As you work with the caterer you can allow for headcount at each station that adds up to approx 1.5 plates per person and still have sufficient food.

- H. Always plan for a vegetarian option – either through a planned alternate plate that sit down guests may request or through meatless pasta or salad items on buffet stations.
- I. Dessert at a sit down dinner is suggested as a passed plate of numerous smaller finger desserts accompanied by served coffee (decaf and regular).
- J. Dessert at a buffet may include two stations set up with easy to grab and eat items such as cookies, chocolate dipped strawberries or high end cupcakes supplemented with Coffee and Tea. In the case of a buffet, you typically can plan for only 50% of attendees as the count for this portion of the event.
- K. Although ULI staff will be closely involved in the menu selection if you choose, it is always suggested that it be reviewed by the responsible Council team to ensure it is consistent with the expectations of attendees and past events.

Have Fun!

