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Global Exchange Council

Chair:	Graham Bond	Phone:	(860) 509-2280	Email:	gbond@cornerstoneadvisers.com
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Vice Chair:	Riaz Cassum	Phone:	(617) 848-1551	Email:	rcassum@hfflp.com
Vice Chair:	Todd Kohli	Phone:	(415) 994-3665	Email:	todd.kohli@populous.com
Vice Chair:	Matt Anderson	Phone:	(510) 893-1760	Email:	Matthew_Anderson@trepp.com

Council Reception – October 21, 2014

Council Reception Location: 21 Club
 Address: 21 W. 52nd Street (bet. 5th & 6th Avenues)
 Time: Cocktails: 6:00 – 7:00 p.m.; Dinner: 7:00 – 10:00 p.m.
 Transportation: None
 RSVP contact: Jocelyn Valderrama, (617) 848-1578; jvalderrama@hfflp.com
 Guest Cost: \$200 per guest

Council Day Agenda – October 22, 2014

Millenium Broadway Hotel, 145 W. 44th St., NYC (4.11 / Gotham)

- 7:30 – 8:00 a.m. Breakfast
- 8:00 – 8:15 a.m. Chair’s Welcoming Remarks/Introductions/General Announcements/Business Session
- Reminder to Complete Attendance Sheet
 - Reminder to Complete Evaluation Form
 - ULIF Announcement
 - Review of ULI Priorities & Council Member Expectations (see back page of your agenda)
 - Discussion re: Suggestions for Future Council and Concurrent Meeting Programs
 - Announce Next Meeting:
- 8:15 – 8:45 a.m. New Member/Guest Updates

8:45 – 9:30 a.m. Cross Border Capital Flows: The Appeal of New York and other Global Cities

Capital flows into major global cities have been on a steady rise. New York City has been, and continues to be, on the top of the list of every major global investor. How does New York stack up against London, Paris, Tokyo, Hong Kong etc., as an investment market? Who are the major players active now and where is the capital coming from? What impact will this high level of interest in cities like New York have on the real estate market both in the short run and over the next several years?

Moderator:

Riaz Cassum (f) (c)
Senior Managing Director
HFF

Speakers:

Thomas R. Arnold, A.D.I.A. (c)
Head, Americas Real Estate, Real Estate Department
Abu Dhabi Investment Authority

Martin Frass-Ehrfeld (c)
Partner
The Children's Investment Fund Management

Kai-yan Lee (c)
Managing Director
Vanke Holdings

9:30 – 10:15 a.m. The Challenges of providing Affordable Housing in Global Cities: The New York City Strategy

Like other major global markets, NYC's residential sector is challenged by strong demand drivers, a surge in new high rise supply, rising prices and increased pressure on affordability; as the low/middle income sectors are increasingly being priced out of the market, NYC has developed innovative policies to attract and retain its middle income workforce. This research and policy-based presentation explores the new initiatives that NYC has adopted and addresses the opportunities and challenges facing developers/investors. Selected GEC global residential developers will discuss various initiatives in Brazil, Mexico and the EU.

Moderator:

Ken Munkacy (f) (c)
Senior Managing Director, GID International Group

Speakers:

Mark Willis (c)
Executive Director, NYU Furman
Center of Real Estate and Urban Policy
New York

10:15 – 10:30 a.m. Break

10:30 – 11:30 a.m. Hudson Yards: Case Study of Seminal International City Scale Mixed Use Development

Hudson Yards is the largest private real estate development in the United States and the largest development in New York City since Rockefeller Center. Ultimately this phased mixed use community will have 17 million sf of development and 24 million visitors per year.

Hear from the project's developer and master planner the story of Hudson Yards - the opportunity, the risks, its implementation and anticipated outcomes. Expect lively audience participation following the presentation.

Moderator:

Gene Sisco (f)
President, Development by Design, Inc.

Speakers:

Ken Wong (c)
COO, The Related Cos.

A. Eugene Kohn (f) (c)
Chairman, KPF Architects
(Planners and Designers of Hudson Yards)
New York, NY

11:30 a.m. – 12:15 p.m. Shopping Laboratory: New York City as a Global Center of Retail and other Global City Retail Trends

Showrooming, e-commerce, soaring rents, increasing globalization of retailers and their supply chains, a polarized consumer in mature markets and a growing middle class in emerging economies: all are compelling radical changes and innovation in store design and real estate strategies worldwide. Leading consultants and analysts will examine how these trends and others, including clicks-turned-bricks, are influencing expansion plans for globally-minded retailers in New York, Hong Kong, Beijing, Shanghai, Paris and London, among other shopping capital.

Moderator:

Linda J. Isaacson (f) (c)
Senior Vice President, First American Title

Speakers:

Faith Hope Consolo (c)
Chairman, Douglas Elliman's Global Retail Group

Debra Weinswig (c)
Executive Director & Head of Global Retail Research and Intelligence, Fung Business Intelligence Center

Jan Rogers Kniffen (c)
CEO, J. Rogers Kniffen WWE

12:15 – 2:15 p.m. **Lunch**
Millennium Broadway Hotel (Gotham 1&2), 145 West 44th Street

Presentation: Managing the City

In the 10,000 years that have lapsed since people first started settling in cities, the world's urban population has grown to 3.5 billion. In the next 100 years, it will grow by another 5 billion. The question is not whether we urbanize, but how. This rapid change presents real challenges, but also offers tremendous opportunities. Nothing else humans can do has the potential to improve the quality of life by so much, for so many.

Drawing from his extensive research at NYU Stern's **Urbanization Project**, Dr. Paul Romer will explore the characteristics of successful cities that enhance both investment opportunities and quality of life. By focusing on how managing the "urban enterprise" is the key challenge for all cities today, Dr. Romer will address the characteristics of good cities and bad, and what can be learned and applied as cities continue to evolve.

Speaker:

Paul Romer (c)
Director, The Marron Institute of Urban Management
Stern School of Business
New York University

2:15 – 3:00 p.m. **Afternoon Session:**
Millennium Broadway Hotel (4.11 / Gotham)

Resilient Cities

Grosvenor's research on "Resilient Cities" takes a holistic approach to the measurement of risk in 50 of the world's top cities. By examining their vulnerability and their adaptive capacity scores, Grosvenor has ranked these cities according to their resilience.... a pivotal metric in assessing the long-term impact of exponential population and economic growth on cities globally.

Moderator:

Peter Steil (f) (c)
Chief Executive Officer, NCREIF

Speaker:

Kate Brown (c)
Group Sustainability Director, Grosvenor Group

Invited Panelists:

Dr. John R. Wilmoth (c)
Director of the Population Division
United Nations

3:00 3:45 p.m. **High Rise Buildings / Mixed-Use Developments and their impact on cities**

Mixed-use developments and high-rise buildings: Their aesthetic, economic development and infrastructure-related impact on cities and neighborhoods.

Moderator:

Todd Kohli, RLA (c) (f)
Principal, Populous

Speaker:

Ken Lewis, AIA (c)
Director, SOM New York

Marc Kushner, CEO Architizer (c)
& Co-Founder of HWKN
New York, NY

Larry Ng (c)
Group Director of Architectural and Urban Design
Urban Redevelopment Authority, Singapore
Center for Liveable Cities

3:45 – 4:00 p.m. Wrap-Up / Concluding Comments

4:30-6:00 **General Session: Capital Markets: A Global Perspective**
Jacob K. Javits Convention Center

Capital users and providers from across the globe will engage in a provocative conversation on where the money is coming from and how it is being used.

Speakers:

Jeff T. Blau (c)
Chief Executive Officer
Related Companies

Kok Huat Goh (c)
Chief Operating Officer and President
GIC Real Estate

6:00 – 7:30 p.m. **Cocktail Reception**
Jacob K. Javits Convention Center

KEY:

(f)=Full Member

(m)=Member

(nm)=Nonmember

(i)=Invited Speaker/Moderator/Panelist

(p)=Proposed Speaker/Moderator/Panelist

(c)=Confirmed Speaker/Moderator/Panelist

For more information about ULI please visit www.uli.org



ULI's Priorities

1. Promoting Intelligent Densification and Urbanization

- What are the most responsible ways to provide cost-effective housing for a rapidly increasing global population that is becoming increasingly urbanized?
- How can we advance the understanding of the relationship between a high-quality of life and the built environment to create high-quality, appropriately-priced density that is attractive to users?
- What is the relationship between a thriving economy and a thriving city (and vice versa)-the relationship between a dynamic society and the built environment?

2. Creating Resilient Communities

- What are the best new business models in the real estate and land use industry and how can we support their development?
- How can we best adapt and reuse existing real estate while eliminating obsolete space to create thriving communities?
- How can we influence land use leaders locally and around the world as they reshape the process of community building and developing both social and physical infrastructure?

3. Understanding Demand and Market Forces

- How can we best understand the demand (quantity, type, price, and location of the need) for real estate and discover what the market wants short-term versus what the market needs long-term
- How can we help balance local, regional, national, and global interests as well as public and private interests in terms of how they affect land use decisions and development?
- How will changing technology influence building and buildings, and how will people's use of technology influence how they interact with the physical environment?

4. Connecting Capital and Real Estate Through Value

- How can we best generate value in the built environment that is greater than its cost?
- What are the best ways to ensure the attractiveness of real estate as an investment as institutional capital allocators continue to change and become more global?
- What is the most effective way to demonstrate and explain the relationship between investment in public projects and amenities and the impact on real estate value?

5. Integrating Energy, Resources, and Uses

- How can we best reduce the negative impact of the built environment on our natural resources and climate?
- What are the best ways to use the world's energy resources and protect the built environment from volatile and unpredictable conditions?
- How will trends in energy and resources impact the future best use of land?

ULI Council Member Expectations

Council membership is a privilege desired by many ULI members and the value of the Council experience is determined by the quality and participation of its members. Each Council member is therefore expected to be a committed and participating part of the Council, contributing as much value to the Council experience as they take home.

OPEN, HONEST, SPECIFIC INFORMATION AND EXPERIENCE: Come to Council meetings ready to participate openly and honestly with specific, detailed information and experience from your current real estate practice.

CONFIDENTIALITY: Everything discussed within a Council is kept completely confidential by all Council members. This is the foundation that makes open and honest sharing of detailed information and experience possible. Violation of confidentiality will result in immediate expulsion from your Council.

REAL DEALS, REAL NUMBERS: The key to truly valuable interaction between the Council members is the sharing of real deals and real number, successes as well as lesson learned.

RESPECT FOR OTHERS: Help make discussions productive and high value by engaging your fellow council members respectfully with your most relevant information and experience.

NO SELF PROMOTION: Councils members are all highly successful real estate professionals. Self promotion and pitching do not add value for your fellow council members. Keep your presentations and discussions aimed at delivering real take home value for your peers, not your business.

NO CELL PHONES OR BLACKBERRIES: It should go without saying that you cannot be fully engaged in your council while checking your email. Most Councils have breaks designed to allow members to check in and stay connected a few times during the day.

ATTEND EVERY MEETING AND ATTEND ALL DAY: Each Council member has been chosen for the value that their unique background and experience brings to the Council. Missing a Council meeting or part of a Council meeting reduces the value for every other member of your Council. Your empty seat could easily be filled by someone else who has value to bring to the table.

RECRUIT THE BEST AND BRIGHTEST: Council members often come into contact with new leaders in the industry, ULI members and non-ULI members, with exciting new products, ideas and best practices that will add greatly to the value of their Council. Bring these new leaders as guests to your Council, sponsor them for Council membership and work with your Council leadership to help them become future members of your Council.

PARTICIPATE IN ULI AND ULI LEADERSHIP: Council members are expected to be active participants in ULI's mission of providing leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. Your involvement in ULI provides excellent opportunities to network and to learn both within and beyond the boundaries of your industry segment:

- Attend and participate as speakers and panelists at ULI Spring Council Forums and Fall Meetings.
- Attend and participate as speakers and panelists at Council meetings.
- Serve as panelists at Project Analysis Sessions held at Spring Council Forums and Fall Meetings.
- Serve as panel members for Advisory Services assignments scheduled throughout the year.
- Contribute to ULI publications through the contribution of articles and papers.
- Contribute to the ULI Foundation.
- Participate as Committee/Subcommittee/Task Force members.
- Participate in research and education programs.
- Participate in District Council programs in each member's area.