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Small-Scale Development Council - Blue

Chair:	Mary Hager	Phone: 214-360-7835	Email: mh@thackeraypartners.com
Assistant Chair:	Don Broderick	Phone: 303-672-6485	Email: don.broderick@bbvacompass.com
Vice Chair:	Rick Schaupp	Phone: 212-883-2716	Email: richard.schaupp@clarionpartners.com
Vice Chair:	Aaron Schlagel	Phone: 913-609-9424	Email: aaron.schlagel@oakbridgecompany.com
Vice Chair:	Michele Wheeler	Phone: 972-628-7460	Email: mwheeler@jacksonshaw.com

Council Reception – October 21st 2014

Council Reception Location:	New York Athletic Club www.nyac.org
Address:	180 Central Park South New York, NY 10019
Time:	6:30 pm –9:30 pm
Transportation:	None
RSVP contact and cost:	Confirm attendance and if bringing a guest (fee: \$175 per guest, payable to ULI) Contact: Amanda Vocaturo at 203-541-1306 or avocaturo@collins-llc.com . Mail guest checks to: Amanda Vocaturo Collins Enterprises, LLC 2001 West Main Street, Suite 175 Stamford, CT 06902
Special Notes	Attire is business attire (no jeans, T-shirts and sneakers allowed at NY Athletic Club).

Council Day Agenda – October 22nd 2014

New York Athletic Club (Presidents Room), 180 Central Park S.

7:30-8:00 **Networking Breakfast**

8:00-8:30 **Chair's Welcoming Remarks/Introductions/General Announcements/Business Session**

- Introduction of Members and Guests
- 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:
 - ULI Spring Meeting – Houston, TX
 - Receptions on Wednesday May 13th, 2015
 - Council Meetings on Thursday May 14th, 2015

8:30-9:15 Economic and Capital Markets Overview – is your glass half full or half empty?
We will start the day with an overview of the current market environment. Discussion will be centered around where you think the market is headed next and how it might impact your business.

Speaker:

Tim Wang (f)
Director, Head of Investment Research, Clarion Partners
New York, New York

9:15-9:55 How do the new crowdfunding platforms really work and what does it mean for the small scale developer?
Davenport Partners recently acquired an 86,000 square foot office building in Southern California. Hear why they utilized RealCrowd's services to raise a portion of the equity. ReadCrowd is an online syndication platform where accredited investors invest directly with commercial real estate operators. Davenport and RealCrowd will walk you through their experiences.

Moderator:

Don Broderick (f)
Senior Vice President, BBVA Compass
Denver, Colorado

Speakers:

Jeff Nickel (f)
Partner, Davenport Partners
Covina, California

Adam Hooper (f)
Co-Founder, RealCrowd
Palo Alto, California

9:55-10:10 Break

10:10-10:50 Town and Country Village
Retail repositioning in the Center of the Universe – taking a pioneering product type built in the 1950's through a current transformation into Palo Alto's favorite community gathering place.

Speaker:

James F. Ellis (f)
Managing Partner, Ellis Partners
San Francisco, California

10:50-11:20 Wireless Update: The latest in wireless networks coupled with an innovative case study
Property owners should be aware of the wireless infrastructure improvements needed to facilitate high speed internet connectivity. From tower development to rooftop leasing and small cell architecture, wireless offers revenue potential for informed property owners. Transparency is critical in gaining community support. Hear how this developer created a transparent community outreach strategy utilizing technology.

Speaker:

Len Forkas (f)
President, Milestone Communications, Inc.
Reston, Virginia

11:20-11:30 **ULI Foundation**

Speaker:

Mike Couch (f)
President/Owner, Couch Properties
Palo Alto, CA

12:00-1:30 **Lunch**
Location: New York Athletic Club

Description: **New York at the Cutting Edge**
The Private Market Reaction to New Investment in the City's New Public Parks

Introduction:

Arthur Collins (f)
President
Collins Enterprises LLC
Stamford, CT

Speaker:

Alexander Garvin (f)
President & CEO
AGA Public Realm Strategists
New York, NY

Alexander Garvin is a noted American urban planner, educator, and author. He is in private practice at Alexander Garvin & Associates in New York City and is also an adjunct professor at the [Yale School of Architecture](#) (Yale School of Architecture 2011). He is widely heralded for studying and rationalizing Atlanta's proposed greenbelt park system, the Atlanta BeltLine. Additionally, he was behind New York City's 2012 Olympic Games bid, as well as overseeing efforts to redevelop lower Manhattan, especially around the [World Trade Center](#) site – after the [September 11 attacks](#). Garvin's importance to town planning stems from his work having had the potential to change the face of several of America's largest cities, as well as the numerous works of literature he has published. Previously, Mr. Garvin was a commissioner on the New York City Planning Commission, and from 1970 to 1980, served as New York City's Deputy Commissioner of Housing and Director of Comprehensive Planning.

1:30-2:10 **Clearview Business Park**
A vacant infill corporate user facility in San Mateo, California, with a 2008 busted capital stack is repositioned for Next Gen tenants leading to a successful conclusion.

Speaker:

Thomas McCahill (f)
Managing Principal, EverWest Real Estate Partners
Lakewood, Colorado

2:10-2:50 **Seven Harrison**
Redevelopment of a striking turn of the century warehouse building into 12 luxury residences in Tribeca, one of downtown New York City's most coveted neighborhoods.

Speaker:

Scott Sabbagh
Partner, Matrix Development
New York, New York

2:50-3:05 **Break**

3:05-4:00

Don't Youse Fahgettaboudit!

Interactive conversation about the themes and key takeaways from the day.

Moderator:

John Alexander (f)
President, Mallard Creek Capital Partners
Charlotte, NC

4:00-4:15

Evaluations, Program Suggestions, Next Meeting

4:30-6:00

Jacob K. Javits Convention Center

General Session: Capital Markets: A Global Perspective

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
Chief Executive Officer
Related Companies

Kok Huat Goh
Chief Operating Officer and President
GIC Real Estate

6:00-7:30

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.