



DOWNLOAD THE ULI EVENTS APP – FALL MEETING

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Small-Scale Development Council - Gold

Chair:	Craig Kaufman	Phone: 404-307-1163	Email: ckaufman@kaufmaninc.com
Assistant Chair:	Gary Linhart	Phone: 602-957-8300	Email: glinhart@viawestprop.com
Vice Chair:	Art Collins	Phone: 203-541-1301	Email: acollins@collins-LLC.com
Vice Chair:	David Adelman	Phone: 210-417-4314	Email: davida@areatx.com
Vice Chair:	Brad Beelaert	Phone: 704-491-4230	Email: bbeelaert@whirep.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 (at new address below)
 Collins Enterprises, LLC
 1455 East Putnam Avenue, 2nd Floor
 Old Greenwich, CT 06807

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 (Colonial Room), 180 Central Park S.

7:30-8:00am Networking Breakfast

8:00-8:30am 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

8:30-9:30am Town Hall Meeting

A thought provoking session designed to set attendees in position to focus on the information that meets their objectives and to gain knowledge suitable to overcome their specific challenges. Come prepared to discuss what you are working on, where/how you are obtaining capital for your projects, the opportunities and challenges you are facing, market trends you are observing, and what keeps you up at night.

Moderator:

Craig Kaufman (f)
President, Kaufman Realty Group
Atlanta, GA

9:30-10:05am Mini- Case Studies by council members – Part 1 (of 2 sessions continued in the afternoon)

Moderator:

Todd Vender (f)
Senior Vice President, Blue Vista Capital Management
Chicago, IL

Presenters:

Tom Burton (f)
Jason Check (f)
Rick Collins (f)
Betsy Cowles (f)
Don Curtis (f)
Patti Earnest (f)
Phillip King (f)

10:10-10:25am: Break

10:25-11:05am Alternative Funding Structures for real estate projects

- a) EB-5 Financing
- b) Crowd Funding

Moderators:

Gary Linhart (f)
Brad Beelaert (f)

Speakers:

Nav Athwal (i)
Co-Founder & CEO will discuss Crowd Funding for Real Estate
RealtyShares
San Francisco, CA

Zach Bonsall (f)
Managing Partner, Evergreen Devco, Inc.
San Francisco, CA

Stephen Navarro will discuss EB-5 Financing (f)
President, The Furman Co.
Greenville, SC

11:05-11:35am Surviving the Cycles as Developer and Builder of For-Sale Housing (is not for the faint of heart)
The speakers are partners that have built several communities including Kensett and Palmer Hill. Kensett is the first new home community built in Darien, Connecticut in more than a generation. The 62 semi-attached homes are set in a 16 acre enclave. Palmer Hill is a 190 home community of townhomes and condos in Stamford Connecticut. They will discuss product, demographics, pricing as well as financing troubles.

Moderator:

Art Collins (f)
President, Collins Enterprises
Stamford, CT

Speakers:

Bob Dale and Bill McGuinness (i)
Partners, Sun Homes
Pawling, NY

11:35-11:45am ULIF

12:00-1:30pm Lunch
Location: NY Athletic Club - Olympic Room 1-5

Description: New York at the Cutting Edge
The Private Market reaction to new investment in New York City's new public parks.

Moderator:
Art Collins (f)
President, Collins Enterprises
Stamford, CT

Speaker:
Alex Garvin (f)
President and CEO, AGA Public Realm Strategists
New York, NY

1:30-2:10pm New York Athletic Club (Colonial Room), 180 Central Park S.
Investment Strategy Session for the Entrepreneurial Operator:
A pension fund advisor investment strategist takes a look at the markets from our perspective.
A Top Down View from an Industry Veteran. At this point, mid cycle, what does the research show and what does it mean for the small scale developer and local investor/operator.

Speaker:

Doug Poutasse (f)
Executive Vice President, Bentall Kennedy
Boston, MA

2:10-2:35pm **Atypical Residential Land Development in Dallas.**
Case studies comparing infill residential development to more conventional suburban development.

Speaker:
Bill Bowness (f)
Chairman Wilbow Group Pty LTD
Australia

Chas Fitzgerald (i)
President Wilbow corporation Inc
Dallas, Texas

2:35-2:45pm **BREAK**

2:45-3:10am **17 Years from Start to Finish – Lots of brain damage, Palo Alto California**

17 years ago, this was the site of a 4.5 acre, in-fill, mid-block dying grocery anchored center in Palo Alto. Today it is mixed use development with 28,000 square feet of retail, multifamily, and single family homes.

Speaker:
Mike Powers (f)
Partner, McNellis Partners, LLC
Palo Alto, CA

3:10-3:40pm: **Mini-Case Studies – Part 2 of 2 (continued from the morning session)**

Moderator:
Todd Vender (f)
Senior Vice President, Blue Vista Capital Management
Chicago, IL

3:40-4:00 **Wrap-Up Discussion with Refreshment (stick around for the beer & wine)**

Moderator:
Craig Kaufman (f)
President, Kaufman Realty Group
Atlanta, GA

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.