



DOWNLOAD THE ULI EVENTS APP – FALL MEETING

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Small Scale Development Council – Silver

Wednesday, October 22, 2014

New York Athletic Club
180 Central Park South
New York, NY 10019
212- 247-5100

www.nyac.org

Attire: Business Casual

Chair:	Scott Shapiro	Phone: 206-999-5088	Email: scott@eaglerockventures.com
Assistant Chair:	David Christensen	Phone: 925- 838-2020	Email: dc@milestoneholdings.com
Vice Chair:	Jeff Helminski	Phone: 248-609-0406	Email: jhelminski@blackfordcapital.com
Vice Chair:	Isaac Manning	Phone: 817-332-3918	Email: isaac.manning@trinityworks.com
Vice Chair:	David Cacciapaglia	Phone: 310-526-5634	Email: david.cacciapaglia@guggenheimpartners.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:	<i>Let us know if you can't make it or are bringing a guest</i> (fee: \$175 per guest, payable to ULI) Scott Shapiro at 206-999-5088 or scott@eaglerockventures.com
Special Notes	Attire is business casual.

Council Day Agenda – October 22nd, 2014

New York Athletic Club (Olympic 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

8:30-9:00 **Turnagain Crossing**
A Small Site Mixed-Use Development in Anchorage, AK

Speaker:

J. Jay Brooks (f)
Senior Vice President
George Smith Partners, Inc.
Boulder, CO

9:00-9:30 **Village Square Shopping Center, Cary NC**
Positioning a Shopping Center for the Next 40 Years

Speakers:

Philip Slovitt (m)
Principal
Shiner Capital Partners, LLC
Wilmette, IL

George S. York, Jr. (f)
President & CEO
York Properties, Inc.
Raleigh, NC

9:30-10:00 **A "Literal" Living Building Challenge -Equity, Health & Beauty**
Old Problems/New Ideas - A Mixed-Use Case Study

Speaker:

Hafsa Burt (f)
President
HB+A Architects
Castro Valley, CA

10:00-10:15 **Break**

10:15-11:00 **Is Crowdfunding becoming Crowded?**

Moderator:

Richard Perlmutter (f)
Managing Member
Foulger Pratt Argo
Rockville, MD

Panelists:

Nav Athwal (nm)
Co-Founder
RealtyShares
San Francisco, CA

Ben Miller (m)
Co-Founder
Fundrise
Washington, DC

Darren Powderly (f)
Co-Founder
CrowdStreet, Inc.
Portland, OR

11:00-11:30 **Survival Through the Great Recession**
Mistakes Made and Lessons Learned

Speaker:
Michael Kasser (f)
President
Holualoa Companies
Tucson, AZ

11:30-12:00 **Understanding CMBS Lender Risks**
The Alchemy of Hedging Commercial Mortgage Backed Securities and What Borrowers Should Know

Speaker:
Barry Polen (nm)
Managing Director, CRE Debt
Guggenheim Partners
New York, NY

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.

1:30-1:45 **Break**

1:45-2:30

Passing the Business to the Next Generation of the Family
Succession Planning 102

Moderator:

Isaac H. Manning (f)
Partner
Trinity Works
Fort Worth, TX

Speakers:

Robert E. Hughes Jr. (f)
President
Hughes Development Corporation
Greenville, SC

Robert E. Hughes III (f)
Project Manager
Hughes Development Corporation
Greenville, SC

Lat Purser III (f)
Chairman & CEO
Lat Purser & Associates, Inc.
Charlotte, NC

Lat H. Purser (f)
Senior Vice President
Lat Purser & Associates, Inc.
Charlotte, NC

Smedes York (f)
Chairman
York Properties, Inc.
Raleigh, NC

George S. York, Jr. (f)
President & CEO
York Properties, Inc.
Raleigh, NC

2:30-3:00

Ashley Plaza Shopping Center, Charleston SC
Acquisition and Now Turnaround of a 40-Year Center; A Work in Progress

Speaker:

David B. Chandler (f)
Managing Director
Faison
Charlotte, NC

3:00-3:15

Break

3:15-3:45 **Repositioning of Industrial into Office**
Redevelopment on a Modest Budget in an Urbanizing Neighborhood in Midsized City

Speaker:
Andrew Blake (f)
Principal
Presidio Interests, LLC
Fort Worth, TX

3:45-3:50 **Wrap-Up and Evaluations**
Next Meeting: Houston, TX – Thursday, May 14, 2015

3:50-4:30 **SSDC Happy Hour, NYAC Room TBD**

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.