Council Leadership

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kacey Cordes Mahrt</td>
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<tr>
<td>Andrew Fogg</td>
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<td>Vice Chair - Membership</td>
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<td>Vice Chair – JEDI*</td>
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<td>Dominic Ruiz</td>
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</tr>
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*JEDI = Justice, Equity, Diversity, and Inclusion

Council Day Agenda:

Equitable Development and the Future of Real Estate

Our P3 Council is uniquely positioned to emerge as a thought leader within the development industry.

How can we support each other through social justice education, personal storytelling, and best practice advocacy to build more equitable communities?

As you’ll see on the following page, our agenda aims to provide a dynamic environment for Council Members to share with each other, reflect on how our industry is evolving, and learn from an innovative community in the Bay Area. Here’s an overview of HOPE SF, in addition to the fantastic lineup of panelists who will join us on October 21.

**THE HOPE SF COMMUNITY**

[https://www.hope-sf.org/](https://www.hope-sf.org/)

HOPE SF is the nation’s first large-scale community development and reparations initiative aimed at creating vibrant, inclusive, mixed-income communities without displacing original residents. During this dynamic session you will get an overview of HOPE SF, an innovative community development initiative that is rooted in racial equity and reparations; understand the impact of historical and ongoing harm caused by our systems (government, philanthropy, non-profit, housing); and receive some case studies, testimonials, and tips on how to build trust in communities that have been isolated and marginalized and accomplish ambitious goals over several decades, across sectors, and across power dynamics.

PANELISTS

- Anne Griffith – Enterprise Community Partners
- Ellie Rossiter – San Francisco Foundation
- Grecia Mannah-Ayon – San Francisco Foundation
- Uzuri Pease-Greene – Resident of Potrero Annex and Executive Director of C.A.R.E.
- Damon Harris – Bridge Housing
- Lydia Ely – Mayor’s Office of Housing and Community Development
### Run of Show

<table>
<thead>
<tr>
<th>Start Time (CT)</th>
<th>Duration</th>
<th>Segment</th>
<th>Speakers</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00</td>
<td>10 min</td>
<td>Welcome</td>
<td>Kacey</td>
<td>Virtual &quot;Check In&quot; via Google Doc, asking Members to share what they learned at Fall Meeting</td>
</tr>
<tr>
<td>1:10</td>
<td>25 min</td>
<td>Leadership Update</td>
<td>Kacey</td>
<td>Broad view of how our council is evolving, new members of the leadership team, national DEI Council</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Jeremy</td>
<td>Membership update including diversity recruiting strategy</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Andrew</td>
<td>Annual Fund update and call for contributions</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Darryl</td>
<td>Introduce DEI Working Group and invitation to engage</td>
</tr>
<tr>
<td>1:35</td>
<td>25 min</td>
<td>Bridge from Spring</td>
<td>Darryl / Sam</td>
<td>We heard many personal insights when we gathered in June. This will give several pre-selected Council Members a chance to share what they've been thinking about since then.</td>
</tr>
<tr>
<td>2:00</td>
<td>5 min</td>
<td>Break</td>
<td></td>
<td>Five minute break</td>
</tr>
<tr>
<td>2:05</td>
<td>30 min</td>
<td>HOPE SF intro</td>
<td>Jeremy</td>
<td>Introduce the HOPE SF project and its relevance to our equitable development focus</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Panelists</td>
<td>Panelists offer brief context for their role in the project and its impacts</td>
</tr>
<tr>
<td>2:35</td>
<td>20 min</td>
<td>HOPE SF breakouts</td>
<td>Sam</td>
<td>In this innovative format, our Council Members will split up into breakout rooms and be joined by a panelist for small group discussion. A member of our Leadership team will serve as moderator for each room.</td>
</tr>
<tr>
<td>2:55</td>
<td>5 min</td>
<td>Break</td>
<td></td>
<td>Members Zoom back into main room and then take five minute break</td>
</tr>
<tr>
<td>3:00</td>
<td>15 min</td>
<td>Report out</td>
<td>Dominic</td>
<td>Each breakout room reports back to the full group, offering takeaways from the conversation</td>
</tr>
<tr>
<td>3:15</td>
<td>15 min</td>
<td>Close / Takeaways</td>
<td>Andrew</td>
<td>Virtual &quot;Survey&quot; via Google Doc reflecting on what we discussed today and what comes next</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Ron</td>
<td>Quotes, our favorite tradition!</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Kacey</td>
<td>Farewell</td>
</tr>
<tr>
<td>3:30</td>
<td>150 min</td>
<td>TOTAL</td>
<td></td>
<td>2.5 Hours of Content Scheduled / 3 Hours Blocked on Calendars</td>
</tr>
</tbody>
</table>

For Technical Support day-of, contact:
Keeya Clayton, ULI Staff
Keeya.clayton@uli.org
321.424.3107
ULI’s Mission

The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.

ULI is committed to:
• Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs;
• Fostering collaboration within and beyond ULI’s membership through mentoring, dialogue, and problem solving;
• Exploring issues of urbanization, conservation, regeneration, land use, capital formation, and sustainable development;
• Advancing land use policies and design practices that respect the uniqueness of both the built and natural environments;
• Sharing knowledge through education, applied research, publishing, and electronic media; and
• Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges.

ULI’s Content Pillars

The ULI Content Pillars provide a bridge between our broad mission and the programs that deliver it. The Pillars represent the timeless topics or concerns of the organization, within which the program of work must fit.

Housing and Communities
This pillar is firmly grounded in the founding of the organization in 1936. References to housing products and policy, and specifically to the provision of affordable housing, are included in ULI’s Articles of Incorporation. ULI fundamentally believes that housing is a fundamental underpinning of healthy and thriving communities.

Real Estate Finance and Investment
A great deal of ULI’s value to our members and ability to meaningfully deliver our mission relates to our activities in real estate capital markets, including providing a forum for the providers and users of capital to convene. ULI’s traditional focus has been on connecting capital to real estate through the creation of value. This pillar also encompasses the market and economic factors that affect the supply and demand forces that drive land use change.

Sustainability and Economic Performance
Specifically referred to in ULI’s mission and embedded in ULI’s dedication to the creation of long-term value, sustainability is more than energy efficiency or adaptation to climate change. It encompasses environmental, social, and governance issues as they relate to efficient use of resources and creating and maintaining a sustainable and resilient built environment.

Innovation in Development Practice
ULI’s applied research and education programs are based principally on best practices, on “what works,” and the process of real estate development remains central to the mission and to our members’ activities. We foster innovation, but look to practical experience and knowledge sharing to advance the state of the art. This pillar refers primarily to activities, at various scales, that are considered site-specific. ULI traditionally takes a case study approach, using real-world examples to illustrate broadly applicable principles and practices.

Shaping Successful Cities and Regions
Site-specific development occurs within a broader physical and policy context shaped by numerous actors and decision-makers. This larger context, from neighborhood to metropolitan region, is the subject of this pillar. Here, activities and issues transcend property boundaries and encompass land use planning and development policy, infrastructure, metropolitan growth strategies, and transportation issues.
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:** 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.