

INVESTMENT OPPORTUNITIES 2022

Management Committee 2021-22

Nov. 1, 2021

District Council Chair: Trinity Hart,
Storie Co. Development
Chair, Mission Advancement:
Brad Vogelsmeier, Milhaus
Treasurer: Oscar Gutierrez,
Bondry Consultants
Governance Chair:
Adam Thies, Indiana University

Community Services Co-Chairs:
Aletha Dunston,
Fort Harrison Reuse Authority
Jenell Fairman, Carmel
Redevelopment Authority

DEI Co-Chairs:
Leah Stanton,
Business Furniture + Choreo
Keith Veal, ReSite Development

Membership Co-Chairs:
Betsy Sullivan,
Inherent Commercial
Neil Myers, V3 Companies

Monumental Awards Co-Chairs:
Misha Rabinowitch, Dinsmore
Sarah Reed, City of Noblesville

Programming Co-Chairs:
Molly Burns,
F.A. Wilhelm Construction
Karen Valiquett,
Shrewsbury & Associates

Sponsorship Co-Chairs:
Justine Massonnier,
Buckingham Companies
Allie Rosenbarger,
Jani Development

WLI Co-Chairs:
Amandula Anderson, IFF
Annie Xie, Ice Miller

WLI Summit 2022 (Indianapolis):
Lisa Laflin, West Indianapolis
Development Corp.
Samantha Spergel, Indiana
Housing & Community
Development Authority
Valerie Becker,
Scannell Properties

YLG Co-Chairs:
Audrey Streitz, Onyx + East
Brandon Bart, Onyx + East

At Large:
Vincent Ash, Indiana Economic
Development Corporation
Annie Dixon, Indianapolis MPO
Deb Kunce, J.S. Held
Joe White,
New City Development

Dear Indiana Stakeholders,

ULI Indiana is proud of what we have accomplished in 2021, like:

- Seven in-person [ULI On Location](#) project tours
- Six [Online Breakfast Series](#) events, including a Spring mini-series on Indianapolis policy updates like the TOD ordinance, electric vehicle readiness, and energy benchmarking
- Year 2 of the [Real Estate Diversity Initiative](#) (REDI), graduating 25 people of color and women who are now ULI members
- Year 1 of [UrbanPlan](#) with Ball State's *Introduction to Urban Planning* class, reaching 200 undergraduates (Year 2 just started.) The program is exposing more young people to careers in real estate and land use.

These achievements were made possible thanks to our 2021 investors, who you can find [on our website](#).

In July, our new fiscal year brought 17 new and 10 returning [Management Committee](#) members. These passionate local leaders, and those who went before them, are key to developing and implementing our programs.

For 2022, we have ambitious goals and a corresponding need for financial and leadership support, and **we think you might be interested.**

- Since members' time is precious, we'll focus on fewer, larger events that ensure quality content and networking and maximize value for members and sponsors. Members will connect in smaller groups through breakout sessions, roundtables, tour groups, affinity groups, etc. **The total investment needed for events is \$50,000.**
- **We'll continue REDI with its annual investment of \$35,000.** To sustain the program for the next five years, we need to secure long-term commitments of \$175,000.
- We'd like to fully fund UrbanPlan—now being supported by sustaining sponsors—and expand its use for community workshops in Central Indiana. The workshops help citizens and planners better understand the dynamics of the development process, expand their vocabulary to discuss proposals, and develop more empathy for development challenges. **The total UrbanPlan investment need—university work, two community workshops, and annual training—is \$35,000.**
- Our biggest project is the 3rd **Equitable Development Summit, presented by the Women's Leadership Initiative (July 27-29).** This conference has attracted ULI members from over 20 states, and we're excited to welcome them to Indy. **The investment need for the conference is \$100,000.** If we excel at execution and fundraising, this could position Indy for a larger ULI conference.

Since we need both funding and leadership, we're offering sponsors the opportunity to participate in program leadership. Local leaders help shape the future of Indiana's built environment through the programs they design and implement. Along the way they grow their leadership skills and make valuable connections for personal and business development. **Talk to us about what opportunities suit you and your staff.**

We're hoping to secure all investment commitments by 12/31/21, with payments beginning in either 2021 or '22 (your choice) and installments available. **Please reply with your investment choices by Fri., Nov. 12, after which we will confirm availability.**

ULI Indiana

INVESTMENT OPPORTUNITIES 2022

Investment Options

Check all that apply. More details available on the following pages. Return to Indiana@uli.org.

I want to support:

Events

Need: \$50,000

Committed: __%

Real Estate Trends (1/13/22)

- ☐ Headliners (2 available)
\$3,000
- ☐ Influencers (6 available)
\$1,500

Signature Breakfast Event: Housing Attainability

- ☐ Initiators (2 available)
\$2,000
- ☐ Accelerators (4 available)
\$1,000

Signature Breakfast Event: Sustainability

- ☐ Initiators (2 available)
\$2,000
- ☐ Accelerators (4 available)
\$1,000

ULI On Location (5)

- ☐ Promoters (Series Sponsor)
(2 available)
\$2,500
- ☐ Place Makers (4 per event)
\$500

60-Minute Mentors (2)

- ☐ Collaborators (1 per event)
\$1,500
- ☐ Connectors (1 per event)
\$750

Real Estate Diversity Initiative (REDI)

Need: \$35,000

Committed: __%

- ☐ Catalyst (1 available)
\$10,000
- ☐ Advocates
\$5,000
- ☐ Allies
\$1,600
- ☐ Friends
\$300

Affinity Groups

Young Leaders Group

Need: \$3,200

Committed: __%

- ☐ Investors (2 available)
\$1,600

WLI Regional Summit

Need: \$100,000

- ☐ Investment options available
soon—check here to be
informed

Who should we feature in the 60-Minute Mentor Events?

Are you willing/able to make a request of that person?

UrbanPlan

Need: \$35,000

Committed: __%

- ☐ Underwriters
\$10,000
- ☐ Boosters
\$5,000
- ☐ Workshop Sponsors
(2 available)
\$3,500
- ☐ Workshop Food &
Beverage Sponsors

Women's Leadership Initiative

Need: \$3,200

Committed: __%

- ☐ Investors (2 available)
\$1,600

Advisory Services

- ☐ Check here if you'd like to
learn more

I want to support the
Indiana district council
as a whole:

Sustaining Sponsors

Need: \$60,000

Committed: __%

- X Founder/Benefactor
(not available)
\$12,000
- ☐ Patrons (4 available)
\$6,000
- ☐ Champions (12 available)
\$3,200
- ☐ Investors (6 available)
\$1,600

Leadership Opportunities

- ☐ Check here if you'd like to
learn more about
opportunities for you or
your staff

Company name:

Email for invoice:

Bill me:

- ☐ Now
- ☐ 1Q22

INVESTMENT OPPORTUNITIES 2022

Connect: About our audience



Industry sector (all ULI)

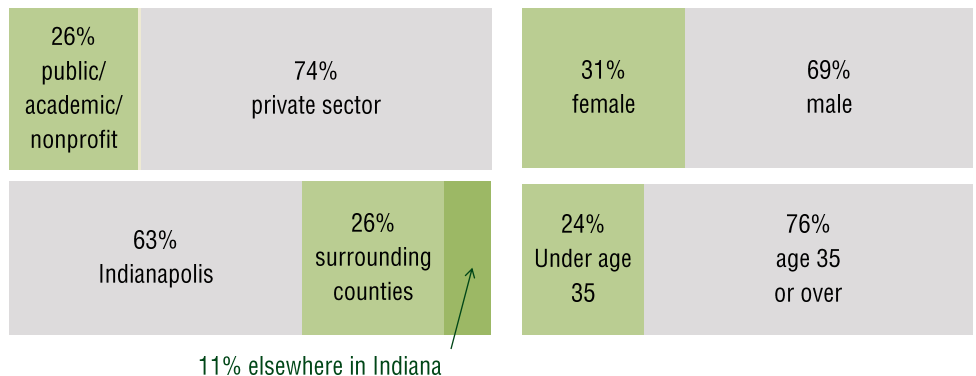


Most active organizations in ULI Indiana



Other facts about ULI Indiana

350+/- members
2,500 constituents on our mailing list



INVESTMENT OPPORTUNITIES 2022

Educational Programs: Four Signature Events

Why these topics?

Real Estate Trends has been a signature program of ULI Indiana for over a decade.

In addition, ULI has chosen these topics as mission priorities worldwide:

- Decarbonizing the real estate sector and accelerating progress towards net zero
- Increasing housing attainability in communities worldwide
- Educating the next generation of diverse real estate leaders
- Pursuing unrelenting efforts to shape the built environment toward diverse, equitable, inclusive communities.

ULI believes these should be the top priorities for the industry today, and are where we—a coalition of 45,000 members worldwide—have the power and responsibility to make a real impact.



Investment Opportunities

Real Estate Trends (Jan. 13, 2022)

- Largest event of the year (250+)
- Keynote from *Emerging Trends in Real Estate* author Andy Warren, PwC
- Breakout sessions on leading trends
- Cocktail reception
- New location: Madam Walker Theater
- Opportunity for members and sponsors to host post-event dinners
- Associate your brand with this signature event and accelerate progress in Indiana

Need: \$15,000

- ☐ **Headliners: \$3,000**
- ☐ **Influencers: \$1,500**

Sustainability Event (Spring or Fall 2022 TBD) Housing Event (Spring or Fall 2022 TBD)

- Popular breakfast timeslot
- Extended timeframe for deeper discussion and networking
- Historically popular location: Indiana Landmarks Center
- Associate your brand with your choice of one of these important issues and accelerate progress in Indiana

Total Need: \$15,000

- ☐ **Initiators: \$2,000**
- ☐ **Accelerators: \$1,000**

Equitable Development Summit, Presented by the Women's Leadership Initiative (July 27-29, 2022)

- Third annual event
- Past events attracted attendees from up to 20 states
- Three-day event with multiple opportunities for education and networking
- Downtown location: Historic Union Station and Crowne Plaza
- Associate your brand with this important issue and accelerate progress in Indiana

Total Need: \$100,000

Multiple sponsorship levels will be available from \$12,000 VIP sponsors to \$1,400 table sponsors. More information coming soon.



INVESTMENT OPPORTUNITIES 2022

Experiential Programs: Seven events, Two categories

Why these categories?

Sometimes the most inspiring events are the ones you associate with an experience. For 2022, we are bringing you two types of experiential events:

- Our popular ULI On Location event series, now entering its 6th year
- The opportunity to spend an hour with a prominent local industry leader, called 60-Minute Mentors

Investment Opportunities

ULI On Location (5 events)

- Popular after-work/cocktail hour time slot
- Focused on new projects in Indianapolis and suburbs
- Events take place from late March to early November
- In 2022 we will extend the length of events and increase early registration
- Associate your brand with this signature event series to promote high quality projects in Indiana
- Draw attention to your work and employees

Total Need: \$15,000

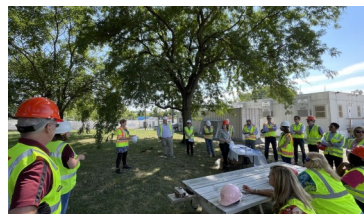
- ☐ **Promoters (Series Sponsors): \$2,500**
- ☐ **Place Makers: \$500**

60-Minute Mentors (2 events)

- New program format to ULI Indiana but popular in other ULI District Councils.
- Variable time slots available, likely lunch
- Variable locations available
- Likely to take place indoors in cold weather months
- Associate your brand with these events to honor the contributions of industry VIPs and spread knowledge

Total Need: \$5,000

- ☐ **Collaborators: \$1,500**
- ☐ **Connectors: \$750**



Q: With a mission to Connect, why are you reducing the number of general audience events in 2022?

A: Time, Quality & Value

Time is precious. People can only attend so many industry events. And these days, they're more discriminating about their time than ever before.

When you come to a ULI event, we want it to be worth your while. By focusing on fewer events, we can ensure high quality content and networking opportunities.

By modestly reducing the number of general audience events, we'll create can't-miss opportunities and expect to see average event attendance increase. This is a benefit to both event participants and sponsors.

You'll still have the opportunity to connect in smaller groups through breakout sessions, roundtables, and tour groups. We also encourage members to plan their own connections like post parties, lunch or coffee.

INVESTMENT OPPORTUNITIES 2022

Summary of Event-Based Investments



Investment Levels and Benefits	Total Event Sponsorship—FY22 Investment Need: \$50,000									
	Educational Programs					Experiential Programs				
	Real Estate Trends Need: \$15,000		Signature Breakfasts (2) Need: \$15,000		On Location (5) Need: \$15,000		60-Minute Mentors (2) Need: \$5,000			
	HEADLINER \$3,000	INFLUENCER \$1,500	INITIATOR \$2,000	ACCELERATOR \$1,000	PROMOTER \$2500	PLACEMAKER \$500	COLLABORATOR \$1,500	CONNECTOR \$750		
Professional/Business Development										
Opportunity to participate in program planning	√		√			√		√		
Opportunity to introduce speakers	√		√			√		√		
Verbal recognition at event		√		√			√		√	
Complimentary registrations for staff or clients	4	2	4	2		2 per each event	2 per hosted event	2	1	
Marketing/Media										
Logo placement/size	Top, Larger	Bottom, Smaller	Top, Larger	Bottom, Smaller		Top, Larger	Bottom, Smaller	Top, Larger	Bottom, Smaller	
Logo placement (with link) on weekly eblasts related to the event(s) (2,500+ recipients/week)										
Logo placement on-site at event(s)										
Year-round logo placement on relevant program page at Indiana.uli.org										
Social media exposure										

Affinity Groups:

Young Leaders Group & Womens Leadership Initiative

ULI has made it a priority to develop the next generation of diverse real estate leaders. People under 35 and women—historically underrepresented in the industry—have been the starting point.



Investment Levels and Benefits	YLG FY22 Investment Need: \$3,200		WLI FY22 Investment Need: \$3,200	
	Young Leaders Group (YLG) \$1,600		Women's Leadership Initiative (WLI) \$1,600	
	Professional/Business Development			
	Opportunity to participate in Steering Committee			
	One complimentary registration to any paid local event			
	Marketing/Media			
	Logo placement (with link) on weekly eblasts related to this program (2,500+ recipients/week)			
	Logo placement (with link) on program page at Indiana.uli.org			
	Social media exposure			



In 2022 a major project will be the *Equitable Development Summit*, presented by the *Women's Leadership Initiative*, scheduled for July 27-29 in downtown Indianapolis. Multiple sponsorship levels will be available, from \$12,000 VIP sponsors to \$1,400 table sponsors. More information coming soon.

The mission of ULI's Women's Leadership Initiative is:

- **Promote the advancement of women**, throughout their careers, as leaders in the real estate industry.
- **Increase the number of women who serve in leadership positions** in the real estate industry and in ULI.
- **Increase the visibility of women leaders** in the real estate industry and in ULI.
- **Increase the number of women who are active ULI Full members**, and support the development of young women members as leaders in ULI and in their professions.

INVESTMENT OPPORTUNITIES 2022

Real Estate Diversity Initiative (REDI)

ULI strives to be the voice and vehicle for changing the complexion of the real estate industry in Indiana through:

- **Access** – Providing the Mentorship, Social Capital, and Ecosystem to support business and career development
- **Opportunity** – Identifying and advocating for people of color (POC) & women for employment and business development
- **Investment** – Advocating for the establishment of investment vehicles that support businesses and projects owned by and/or led by POC & women

“This class... has connected an underserved and under-connected network of folks who are helping bring each other to the table for important discussions and opportunities.”

– REDI Graduate

About the Program

REDI is a 15-week curriculum formatted like a leadership academy: a cohort of up to 30 scholars is accepted by a competitive process and experiences the curriculum together, culminating in a final presentation and graduation

Charting Progress

Curriculum

Two previous REDI graduates are co-chairing the program in 2022

Our cohort will have access to over 28 hours of online training modules in a newly bolstered curriculum provided by ULI Learning

Indiana Industry Advancements

REDI has graduated 37 scholars (26 persons of color, 19 women) since 2019

Since 2019, ULI IN membership has grown from 4.76% Black members to 12.33% today

- ULI nationally has 5% Black members¹

2021-2022 ULI Indiana Management Committee has:

- 8% POC (5 male, 3 Female)
- 62% Women (18)
- 79% POC & Women (23)

Where we're going

Goals

- Create an ecosystem that supports the skill and career development of POC & Women in commercial real estate
- Advocate for POC & Women in CRE leadership roles in firms, projects and organizations
- Increase the percentage of POC & Women in ULI Indiana and Indiana CRE businesses, by 25% by 2025



INVESTMENT OPPORTUNITIES 2022

Real Estate Diversity Initiative (REDI)



“The REDI program has been a valuable experience in terms of my professional growth and development. The vast array of real estate topics we were able to cover... was extremely valuable and has uniquely placed me in position to use what I have learned to help with development and redevelopment projects across the state of Indiana.”

– REDI Graduate

Investment Levels and Benefits	Real Estate Diversity Initiative FY22 Investment Need: \$35,000 Five-Year Investment Goal: \$175,000			
	Catalyst \$10,000	Advocate \$5,000	Ally \$1,600	Friend \$300
Professional Development/Business Development				
Program branding (i.e. “Presented by...”)	√			
Verbal recognition at Trends Event (Jan. 13, 2022)	√	√		
Opportunity to attend a class session/be recognized	√	√	√	
Opportunity to nominate a class speaker/advisor/scholar	√	√	√	
Invitation to graduation celebration event with scholars	√	√	√	√
Marketing/Media				
Logo placement (with link) on weekly eblasts related to this initiative (2,500+ recipients/week)	√	√	√	
Year-round logo placement on relevant program page at Indiana.uli.org	√	√	√	
Social media exposure	√	√	√	
Logo Placement/Size	Top, Largest	2nd, Smaller	3rd, Smallest	n/a

INVESTMENT OPPORTUNITIES 2022

UrbanPlan

UrbanPlan brings the development process to life through an interactive exercise where teams form development companies tasked with redeveloping a hypothetical site. The program has multiple audiences and goals, and ULI IN is supporting the following in 2021-2022:

- **UrbanPlan Community Workshops**—Designed for adults with an interest in better understanding the dynamics of the real estate development process, workshops help participants develop the vocabulary to speak intelligently about proposed projects in their community and result in greater empathy for development challenges.
- **UrbanPlan for Universities**—Partnering with Ball State University, ULI IN is delivering UrbanPlan in *Introduction to Urban Planning*, reaching approximately 200 students annually. The goal for this work is ULI's mission commitment to "developing the next generation of diverse real estate leaders."

How to support UrbanPlan

- Sponsor at one of the levels below
- Become an UrbanPlan trained facilitator

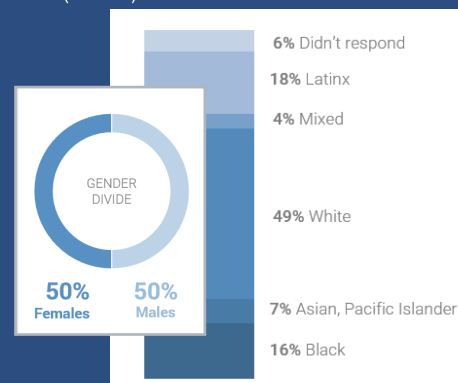
Investment Levels and Benefits	UrbanPlan—FY22 Investment Need: \$35,000			
	Underwriters \$10,000	Boosters \$5000	Workshop Sponsors \$3,500	Workshop Food & Beverage Sponsors \$750
Professional Development/Business Development				
Verbal recognition at Trends Event (Jan. 13, 2022)	√			
Opportunity to attend virtual class session and/or in-person workshop & be recognized	√	√	√	
Complimentary workshop registrations	4 per workshop	3 per workshop	2	1
Marketing/Media				
Logo Placement/Size	Top, Largest	2nd, Smaller	3rd, Smaller	4th, Smallest
Year-round logo placement on relevant program page at Indiana.uli.org	√	√		
Logo placement (with link) on weekly eblasts related to this initiative (2,500+ recipients/week)				
Social media exposure				

UrbanPlan for Universities

ULI IN delivering UrbanPlan virtually to Ball State University's *Introduction to Urban Planning* class in 2020-2021.



Demographics of university participants, FY21 (all ULI)



INVESTMENT OPPORTUNITIES 2022

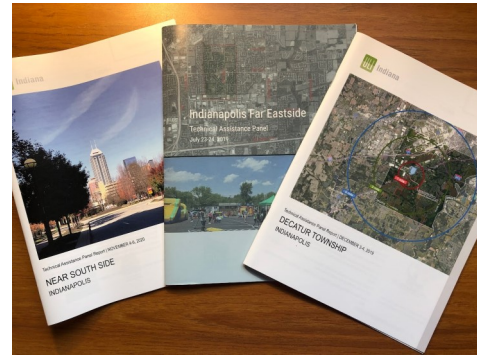
Advisory Services

Did you know that ULI IN provides contract-based advisory services? Leverage our members' expertise to solve your community land use and real estate challenges.

Services may be provided to clients groups, called project sponsors, including:

- cities and towns,
- state and regional agencies,
- neighborhood groups,
- private businesses,
- or a combination of the above.

Choose from a private examination or a public presentation of our findings.



The projects shown above cost approximately \$15,000 for 1.5 days with 3-5 volunteer professionals.

- Have a bigger challenge? Ask us for a referral to ULI's Advisory Services department in Washington, DC.
- Have a smaller budget? Ask us what we can do!

Philanthropy

There are a couple of other ways that you can help, and both fall under the category of philanthropy. In fact, philanthropy may be considered the pinnacle of leadership, based on ULI's mission commitment to "lead in solving community and real estate challenges through applied collective global experience and *philanthropic engagement*."

Giving through the ULI Foundation

If sponsorship isn't right for you, consider donating to ULI Indiana through the ULI Foundation. All gifts are 100% tax deductible. (Note: Sponsorships are generally deductible for the amount paid MINUS the value of services received.)

Let us know if you need help making your donations.

Volunteerism

All of the programs in this brochure—and more—are led by passionate local volunteers like you. Our local leaders have the opportunity to shape the future of the built environment in

Indiana through the programs they design and implement. In so doing, they develop and enhance leadership skills and make valuable connections for business and personal development. Please talk with us about what opportunities might be available to suit you and your staff members.



INVESTMENT OPPORTUNITIES 2022

Sustaining Sponsorships

Want to keep it simple? Sustaining Sponsorships support ULI Indiana's mission and commitments across our breadth of programs, and reach the broadest possible audience.

Investment Levels and Benefits	Sustaining Sponsors—FY22 Investment Need: \$60,000			
	Founder (Private Sector Partner) & Benefactor (Public Sector Partner) \$12,000	Patrons \$6,000	Champions \$3,200	Investors \$1,600
Exclusivity				
Limited to its current sponsors only	√			
Right of first refusal for renewals, upgrades and new sponsorship opportunities	√	√	√	√
Professional/Business Development				
Preference for ULI IN leadership positions	√	√	√	
Sponsor profile featured on ULI IN website and social media	√	√		
Complimentary registrations per every ULI IN event—including UrbanPlan workshops—for staff, clients or guests	4	3	2	1
Tickets to Indy Chamber's Monumental Awards	2	2		
Discounted rate for ULI national meetings (limited number, first-come-first-serve)	√	√	√	
Marketing/Media				
Brand placement and size (on emails and at events)	Logo, Top, Largest	Logo, 2nd, Smaller	Logo, 3rd, Smallest	Text Only, 4th
Brand placement (with link) on weekly eblast (2,500+ recipients/week), Sustainer section (estimated at 125,000 annual impressions)				
Brand placement at events, Sustainer section				
Logo placement (with link) on Indiana.uli.org homepage				
Social media exposure				
Convenience				
Installment billing available	2 payments/yr @\$6,000 OR 4 payments/yr @\$3,000	2 payments/yr @ \$3,000 OR 4 payments/yr @\$1,500	2 payments/yr @ \$1,600(1 yr)	n/a
Register yourself for events with the same code every time, or email us—your choice!				