



AGENDA

2022 Talent Management Meeting

123 North Wacker Drive, 30th Floor tenant space, Chicago, IL | October 26

WEDNESDAY, OCTOBER 26

8:40am	Welcome comments & NAREIM Talent Management committee update Brandy Fulton , SVP, Human Resources, Carmel Partners (Committee chair) Charlotte Flores , VP, Human Resources, BH Management (Committee chair) Sanyu Kyeyune , Head of Programming, NAREIM <ul style="list-style-type: none"> NAREIM Talent Management committee members will provide as context a recap of their July 2022 virtual meeting, a quick update on initiatives underway and future plans, and the key issues to be addressed through the following peer discussions.
8:45am	What's on your mind? <i>NAREIM members' open-mic session</i> Session leader: Brandy Fulton , SVP, Human Resources, Carmel Partners <ul style="list-style-type: none"> Small-group brainstorming: At easels in groups of no more than 6, NAREIM members will jot down 3 issues top of mind. Whole-room feedback: Then, we reconvene the groups to exchange best practices, challenges faced and lessons being learned.
9:30am	NAREIM Compensation & Global Management Surveys — benchmarking for 2023 Introduction by: Courtney Brooks , AVP, Talent Acquisition, Waterton Speakers: Lucy Bertsch , Director, Compensation Consulting, Ferguson Partners Scott McIntosh , Director, Management Consulting, Ferguson Partners <ul style="list-style-type: none"> In this interactive presentation and peer conversation, NAREIM members review in depth the latest findings of the annual Compensation & Global Management surveys, conducted with Ferguson Partners, and providing benchmarking data on base, bonus, long-term incentives, promote/carry and co-investment within real estate investment and the detailed compensation of 120 different positions. The discussion will also focus on mid-year adjustments, with a view toward how much managers should be paying above and beyond the most recent compensation data, and what to plan for in 2023.
10:30am	Break
10:50am	DEI Programs <i>Most firms have been focused on the 'D' in DEI. But what happens next?</i> Session leader: Justinn West-Wheatley , HR Business Partner, BentallGreenOak Speaker: Jami de Lou , VP, Diversity, Equity & Inclusion, Revantage <ul style="list-style-type: none"> Presentation: NAREIM members will hear from a DEI-focused executive on the gains in equity and inclusion that their organization has achieved, the steps they took to get there, and future plans for DEI initiatives. Whole-room discussion: NAREIM members discuss the solutions they are testing and lessons learned along the way.
11:35am	Co-investment — keeping track of employee co-investment: Case study Speakers: Tim Kessler , Global COO, LaSalle Investment Management Jennifer Anderson , Co-founder and CEO, Sidecar Financial <ul style="list-style-type: none"> Irrespective of size, what's the best way to manage employee co-investments? How do you stay on top of all the moving parts from eligibility rules to KYC checks, allocations, legal & tax docs, and of course the ongoing administration and operations work? Co-investment is a critical tool that firms need to retain talent. But the reality of administering a co-investment program is often multiple solutions duct-taped together and an increase in headcount. Last year, as LaSalle looked to streamline and expand their employee co-investment opportunities firmwide, they began working with Sidecar Financial, a company that has built a turnkey solution for private equity firms to manage and expand their employee co-investment programs.



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WEDNESDAY, OCTOBER 26 *continued*

12:10pm	Networking lunch
1:10pm	Future of the workspace: Using workspace analytics to drive employee engagement Session leader: Aimee Hughes, Director, Human Resources, Cabot Properties Speaker: Chris Lambert, Senior Strategy Consultant, Cannon Design <ul style="list-style-type: none"> • Presentations: What employees want from a workspace has changed dramatically since March 2020. But how are our offices and workspaces impacting HR policy and outcomes? And how are real estate investment management HR teams leaning on tech to improve employee experiences in the office? How does this factor into the overall location strategy as teams increasingly return to office? Once the strategy is in place, how do you communicate this to employees and keep them engaged? We dive into case studies highlighting how firms have incorporated future of the workspace technology into talent management practices to drive not only the use and design of a workspace — but ownership and engagement in the space (and corporation) as well.
2:10pm	Creative approaches to health & well-being Session leader: Sherrida Traynham, Senior Vice President, Sr. HR Business Partner, Clarion Partners Speaker: Abbey Donnell, Founder and CEO, Work & Mother Over the past few years talent has expressed increased need for a work environment and culture that promotes the health and well-being of employees. <ul style="list-style-type: none"> • Presentations: Highlighting a few key examples of the most impactful approaches, this session will foster discussion around best practices for designing creative and meaningful health and well-being programs in the asset management and financial services space to meet the needs of employees and attract prospective talent. • Small-group discussion: In groups of no more than 6, NAREIM members will discuss what's working and what's not working as they develop and implement health and well-being initiatives in the workplace: <ul style="list-style-type: none"> ◦ Which health and well-being related benefits do employees want? ◦ What are you offering above and beyond the typical suite of health and well-being benefits? ◦ What's working to prevent burnout? What isn't working?
2:55pm	Break
3:15pm	DEI Survey update Session leader: Zoe Hughes, CEO, NAREIM NAREIM members will review the results of this year's DEI Survey with a view toward refining the questions to best align with our membership's 2023 priorities.
3:35pm	Career path conversations Session leader: Deena Goodman, Director, Human Resources, PGIM Real Estate Guided career conversations and transparent performance feedback are critical to maintaining the engagement of employees and ensuring continued professional growth and development. This session will explore creative and strategic approaches to career path conversations and talent management. Issues to be raised include: <ul style="list-style-type: none"> • How do you talk about career growth with your employees? • What are you doing to create career paths for junior talent?
4:20pm	End of meeting