



**Urban Land  
Institute**

**Inland Empire**

# ULI Inland Empire Annual Report

Fiscal Year 2008

## Annual Sponsors

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# Chair and Executive Committee Message

On July 17, 2007, the ULI Inland Empire Executive Committee held a planning retreat to discuss how to strengthen ULI's presence in Riverside and San Bernardino Counties, including the Coachella Valley. Members of the Executive Committee met with Mike Horst, senior vice president, district councils, ULI and Phyllis Alzamora, executive director, ULI Orange County, to review ULI's mission and priority issues, the role of district councils and maximizing ULI Inland Empire's affiliation with ULI. Participation by all yielded a three-year strategic plan with goals and objectives for membership, sponsorship, and outreach to the public sector. Administrative support of ULI Inland Empire was also reorganized in FY08.

## Membership

Membership is the heart of any organization... without an engaged group of professionals, our local programs will not be successful, our mission will not be met, and our ability to benefit our industry will not be realized. Since mid-2005, however, many of the businesses from which our members originate have seen cut-backs and layoffs compromising our ability to grow in the manner originally forecasted. Although real estate cycles are cyclical and will correct in the future, the need for new members is critical to our viability as an organization. Therefore, over the next three years, to encourage more member involvement the emphasis will be to enhance communications, both electronically and in print, with our members and prospective members, who are leaders in the community in both the public and private sectors and young professionals, under the age of 35, who will be actively engaged in our Young Leaders Group (YLG).

## Sponsorship

Revenue from sponsorships is imperative to ULI Inland Empire's success and 100% of all sponsorship monies is invested in our District Council's educational and networking programs and operations. The strategic plan for sponsorship is based on developing marketing strategies and actively pursuing the implementation and growth of the sponsorship program. Increasing awareness of sponsorship opportunities, increasing sponsor retention and raising the visibility of sponsors supporting ULI Inland Empire will be achieved through enhanced communications as well. A formal sponsorship campaign will be launched annually.

## Public Sector

Public and private representatives share the desire to develop projects and policies that benefit the community in which they work and live. The public sector strategic plan recognizes the importance of making essential connections that help both sectors to understand each other's goals and to improve the approval process. ULI Inland Empire seeks to bridge the communication gap between public and private sectors and establish a framework for working together to solve land use issues by: 1) building connections between public and private sector representatives; 2) creating collaboration on land use issues; 3) becoming a recognized source of information in the Inland Empire; 4) expanding public sector participation in ULI Inland Empire; and 5) developing a learning program on planning and development for Young Leaders.

## Reunification with ULI Orange County

ULI's growth worldwide is fueled by the involvement of members at the local level. Toward that end, ULI has endorsed the creation of entities to serve specific regions under the auspices of a local district council. All ULI district councils strive to be independent, non-political and responsible forums. In doing so, it is important that we keep the quality of ULI at the local level at the same standard you have come to expect ULI to be at the national and international levels. During the difficult economic times that befell the Inland Empire in FY08, the Executive Committee voted to rejoin with ULI Orange County. While we acknowledge that there are differences in geography and demographics between the Inland Empire and Orange County, in our reunification, we recognize that the similarities are more important. ULI Inland Empire will continue to maintain its independent identity and continue its mission to serve the needs of Inland Empire members. Your ULI Inland Empire volunteer leadership will participate in ULI Orange County Executive Committee meetings as well as program, membership and sponsorship committees and ULI Orange County staff will support our administrative and outreach operations.



(L to R) Anne Viricel, Michael Brandman Associates; Sharon Merritt; and Per Hernholm, Hall & Forman, Inc. attended the first-ever ULI Trends in Infrastructure program held in the Inland Empire.



Several members of the ULI Inland Empire Executive Committee pose for a photo after a monthly meeting held at MBA in San Bernardino, Calif. (L to R) Josh Haskins, Iger & Associates; Jim Choate, Fuscoe Engineering; John Shumway, The Concord Group; David Neault, David Neault Associates; Anne Viricel, MBA; Stone James, O'Donnell/Atkins; Christine Iger, Iger & Associates; and Darryl Stephenson, Rancon Group.

## FY08 Executive Committee Members

(July 1, 2007 to June 30, 2008)

John T. Potts, *The Garrett Group*  
Chair

Keith Gardner, *Albert A. Webb Associates*  
Treasurer

Christine Iger, *Iger & Associates Government Interface Consultants*  
Vice Chair, Public Sector

H. Stone James, *O'Donnell/Atkins*  
Vice Chair, Young Leaders Group

Regina Marston, *Ideation Marketing, Inc.*  
Vice Chair, Sponsorship

Jessica McLeish, *Desmond McLeish, Inc.*  
Vice Chair, Communications

David Neault, *David Neault Associates, Inc.*  
At Large

John Shumway, *The Concord Group*  
Vice Chair, Programs

Darryl Stephenson, *The Rancon Group*  
At Large

Anne Viricel, *Michael Brandman Associates*  
Vice Chair, Membership

**Past Chairs:**  
Jeff Gault, *LandCap Partners*  
July 2005 – June 2006

Jim Brooks, *Urban Housing Group*  
July 2006 – March 2007

**ULI Trustees:**  
Randall Lewis, *Lewis Operating Corp.*

Alex Rose,  
*Continental Development Corporation*  
ULI Inland Empire Counselor



Our 4th Annual Mayor's Forum was a success with Mayor Pat Morris, City of San Bernardino; Moderator Christine Iger, Iger and Associates Government Interface Consultants; Mayor Jeff Miller, City of Corona; and Mayor Kathy DeRosa, Cathedral City, who shared their vision and goals for their cities' participation in the growth of the Inland Empire.



Charlie Davison, FORMA Companies (left) enjoys the buffet, the historical ambiance and the camaraderie at the annual Holiday Networking Reception, held at the Joseph Filippi Winery in Rancho Cucamonga.

## Programs

ULI Inland Empire programs are a vital part of educating professionals in the land use and real estate development industries and enriching the ULI membership experience. In FY08, we held 13 programs with almost 700 attendees. Programs, ranging from mixed-use communities at Dos Lagos in Corona to work-force housing and capital markets to trends in real estate and infrastructure, rounded out the fiscal year.

Some of our programs are highlighted in the photos in this annual report. Below is a recap of two of our biggest events and a new Young Leaders Group (YLG) program.

In November 2007, our Coachella Valley Report program was the best attended for FY08, with close to 150 attendees. Our keynote speakers, Dr. Christopher Thornberg, president, Beacon Economics and Mark Pisano, executive director, Southern California Association of Governments (SCAG) gave their perspectives on the state of the region, and speakers from two other panels discussed economic realities and Coachella Valley housing trends.

This fiscal year's program on Emerging Trends, always held at the end of the calendar year, drew over 100 attendees. It was held at Eagle Glen Country Club in Corona with Rick Kalvoda, director, real estate valuation and analysis, Real Estate Advisory Services Group, PricewaterhouseCoopers, giving a national and international trends report. Kalvoda's presentation was followed by a local panel report on local trends.

The Young Leaders Group created a new program in FY08 for professionals under 35 years old called, "The 60-Minute Mentor." This program is designed to connect senior industry professionals with the next generation of real estate industry leaders in the Inland Empire. The program offers a unique opportunity for a small group of young professionals to hear about career steps that led senior professionals to where they are today. Speakers share personal anecdotes, market outlooks, and career mistakes and successes. Time for Q&A is also allotted to make the meeting interactive and informational. The first program was held with Tom Holm, principal and director, environmental services, Michael Brandman Associates. The program was so successful that the YLG members plan to hold at least two similar programs in fiscal year 2009.



Ali Sahabi, SE Corporation, talks about his vision he was able to realize at Dos Lagos.

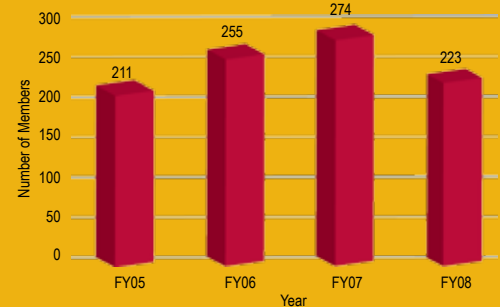


Keith Pittsford, SGPA Architecture & Planning, and David Schmitz, RTKL, discuss best practices of a mixed-use community at the Dos Lagos program and tour in Corona.

## Membership

A new ULI District Council was formed back in July 2005 – the ULI Inland Empire. Over the ensuing three years, members were engaged in bringing high quality programs on complex land use issues specifically related to businesses and agencies in the region. When ULI Inland Empire spun-off from ULI Orange County, there were 211 members with Inland Empire zip codes. ULI Inland Empire continued to grow steadily buoyed by the strength of the residential real estate market. In FY08, membership declined slightly, but held at about 6% more than when the District Council was first formed.

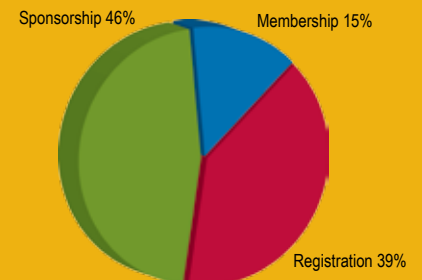
### Membership Growth FY05 to FY08



## Finance

We sought more efficient ways to serve our members in this region as our membership, sponsorship and registration revenues were declining in FY08. The change we made to reunite with ULI Orange County for administrative and operational support and to foster collaboration on programs and issues affecting our two regions greatly assisted us in streamlining our financial operations. We are grateful to Executive Committee member Regina Marston, who also put a lot of effort into strengthening sponsorship support in FY08 and worked hard on bringing in new sponsors. While the total sponsorship dollars for the fiscal year-end declined, many new companies stepped up to support ULI in the region. With nearly half of our operations supported by sponsorship monies, this revenue is vital to the continuation of ULI in the Inland Empire.

### FY08 Revenue



# Thank You to Our Supporters!

The nearly 70 volunteers who gave their time, energy, and expertise to ULI Inland Empire are the reason why the District Council continued to further the mission of ULI. These committee members, speakers, moderators, program coordinators and volunteers were the backbone of ULI Inland Empire in FY08. Thank you for keeping ULI Inland Empire a valuable resource in Riverside and San Bernardino Counties, including the Coachella Valley.

|                    |                   |                       |
|--------------------|-------------------|-----------------------|
| Omar Brownson      | Norm King         | John Reekstin         |
| John Burns         | Rudy Kramer       | Chris Reese           |
| Jim Choate         | Randall Lewis     | Tom Reimers           |
| Jay Clark          | Gabriel Marquez   | Marvin Roos           |
| Lang Cottrell      | Regina Marston    | Alex Rose             |
| Mayor Kathy DeRosa | Maureen McAvey    | Ken Ryan              |
| William Devine     | Jessica McLeish   | Brad Sager            |
| Donny Disbro       | Kim McNulty       | Ali Sahabi            |
| Tom Doyle          | Mayor Jeff Miller | Suresh Samuels        |
| Michael Faelin     | Gil Miltenberger  | Leonard R. Santoro    |
| Pam Fahy           | Mayor Pat Morris  | Jeff Sceranka         |
| Dan Flynn          | Stan Morse        | John Shumway          |
| Keith Gardner      | David Mudgett     | Steve Smith           |
| Jason Glasgow      | David Neault      | Darryl Stephenson     |
| Robert Glessner    | Carl Neuss        | Christopher Thornberg |
| Mario Gonzales     | Scarlet Ng        | Harvey Underdahl      |
| Dan Graziano       | Larry Nordstrom   | Max Vahid             |
| Rod Hanway         | Patrick O'Reilly  | Eric Vail             |
| Josh Haskins       | Ray Osborne       | Anne Viricel          |
| Christine Iger     | Michael Perovich  | David Waite           |
| H. Stone James     | Mark Pisano       | Malcolm Weiss         |
| Brian Jones        | Keith Pittsford   | John Young            |
| Rick Kalvoda       | John T. Potts     |                       |
| Steven Kellenberg  | Chris Pyke, PhD   |                       |



(L to R) FY08 ULI Inland Empire Chair John Potts, The Garrett Group (center) with panelists Dan Graziano, KTG Group; Omar Brownson, CityView; Dan Flynn and John Reekstin, The Olson Company. who share best practices and lessons learned in building and developing workforce housing and exploring issues and opportunities in this market.



John Shumway, The Concord Group (second to the right) joined panelists Tom Doyle, Whittlesey Doyle Real Estate Advisors Land Brokers; Jason Glasgow, Land Cap Partners; Carl Neuse, Pacific Cascade Group; Rudy Kramer, JP Morgan Real Estate Banking; and Larry Nordstrom, PFF Bank & Trust, at a program that focused on trends, construction lending, and opportunistic investing and land brokerage called, "Follow the Smart Money."



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