



ULI Atlanta Mentor/ Mentee Program Outline

Mission: The mission of the mentor program is to foster an exchange of professional ideas, friendship, and expertise among young real estate professionals and industry veterans. This program matches young professionals (mentees) with experienced professionals (mentors) for guidance and support, while offering mentors an opportunity to strengthen ties with the young future leaders of the local real estate community and ULI.

Structure: The structure of the group is 3 entry level, 2 mid-level, and 1 senior level person.

First Meeting: Introductions / Career Goals / Program Goals

- Everyone brings a bio to the meeting with enough copies for everyone in the group. Consider asking for feedback on your bio.
- Each person makes a 5-minute introduction of themselves to the group. End the introduction with one thing that you would like to get out of the mentoring groups.
- Establish the meeting dates for the group through November. We suggest that the groups meet every 6 weeks and schedules 6 to 7 meetings. Each person should take a turn planning a meeting.
- Once the meeting dates are established, set a topic for each meeting. The group could send out a survey prior to the meeting to help streamline this conversation.
- Complete the meeting by discussing mentee career goals and goals for involvement in the mentor/ mentee program, particularly as it related to the topic suggestions below.

Subsequent meetings should be organized around themes with the organizer selecting the topic, location, and activity/ discussion. Consider having two meetings per theme.

Theme 1: Personal Development

1. **Goal Setting and Career Advancement:** Discuss strategies on how to set goals for both professional and personal advancement. Suggest reading *Outliers* by Malcom Gladwell and discuss the 10,000-hour rule and/or *It's Not How Good You Are, It's How Good You Want to Be* by Paul Arden.
2. **Lifelong Learning:** Discuss what you read and how you stay on top of trends in the industry. Circulate an article or publication for group discussion. Consider reading a book during the course of the program. This could be one of those listed above or something topical to ULI (e.g. [The Well-Tempered City](#) by Johnathan Rose; [Evicted](#) by Matthew Desmond)
3. **Work/ Life Balance:** This could be lessons learned, how to use technology for time management, strategies to incorporating personal and professional interests. Articles and other resources could be useful.

Theme 2: Topical Industry Knowledge



1. Finance 101: Review the basics of finance and the impact on Real Estate (private and public). Bring in an “expert” to talk to the group.
2. Zoning and Entitlement: Discuss the impact of zoning regulations on Real Estate. Review the entitlement process and share examples of both positive and negative experiences.
3. Real Estate Transactions: Review the sale and purchase process of real estate transactions. Discuss the various steps that go into completing a sale, from the role that the broker plays to the various consultants that play a role in the transaction. As a group, read through a loan closing checklist, look at lender requirements for property maintenance escrow, and the impact that a poorly maintained property can have on the investment returns.
4. Capital Markets/ Equity Investors: Discuss the role that capital markets and equity investors play in real estate. Invite a representative of an institutional equity investor and an individual or family-trust investor to learn what their goals are with their real estate investments. Review the goals of each group and understand how items like waterfalls, depreciation, and taxes affect real estate investment decisions.
5. Design 101: Review the processes used in designing projects, beginning with the initial site planning to construction. Discuss what the goals are for each phase and the typical timelines. Review positive and negative experiences from the design process. Explore the costs of design for a real estate project and the impact that building codes or accessibility laws have on the design process. Tour a project with a member of the team leading a discussion on design decisions.

Theme 3: Career Development

1. Building your Network: Discuss best and worst practices; attend a networking event together.
2. Managing Others: This could be centered on managing up; managing a team; managing Millennials. This could focus on what we have learned about the characteristics of highly effective teams. Quick and good read for discussion – [Legacy](#) by James Kerr about lessons from a championship rugby team.
3. Asking for and Giving Feedback: How, When, Where, How Much
4. Social Media: How, When and Where to use social media to engage professionally on an individual basis or on behalf of your firm/ organization. Who does it well? What platforms work for which audience? Who to follow?
5. Advocate for Yourself: Discuss best and worst practices for asking for assignments, asking for a raise, selling yourself for a job.
6. Professional Organizations: Discuss how to best leverage ULI; ICSC; NAIOP; AIA for professional advancement. Share personal experiences, questions. Invite ULI staff to share insights.