

Agenda

Day One - October 19, 2021

3pm-5:15pm ET

- 3pm: Welcome comments by: Brandy Fulton, SVP, Human Resources, Carmel Partners
- 3.05pm: Live Feedback on Return to Office Plans
 - Polling and benchmarking: Review results from July Return to Office Poll and kick off discussion with an updated poll to compare return to office plans across firms.
 - Group discussion: What's working and what's not, after significant returns to the office?
 - Trend forecast: How will firms that require a full return to office need to adapt for 2022? How will end of year bonuses impact return to office plans?
- 4.00pm: Retention Strategies Post-Return to Office: Small-Group Workshops with Whole-Room Discussion Breaks

Format: 30-min breakout room discussion: Breakout groups of no more than 6 people. Room leaders will take notes. Followed by 10-min reporting back discussion: Breakout room leaders report back to the whole room on their key takeaways

- Topic A: Embedding DEI initiatives in HR and across whole-firm processes and culture
 - How are you using turnover as an opportunity to increase the diversity of your teams?
 - What measurable steps are you taking in your DEI strategy?
 - What are your goals re: DEI for the next 12-24-36 months?
 - What processes or strategies around DEI would you like to implement in the next year, that you are not currently implementing?
 - What isn't working?
- Topic B: Learning and development strategies
 - Which strategies are proving efficient? Which ones aren't working as well?
 - What new tools are you using to better understand, engage and retain your employees? How are you applying these in training and development, and with what results?
 - Which operational challenges are you facing with onboarding as a significant percentage of employees return to offices?
 - How are you defining checkpoints for new hires?
 - How are you retaining employees as a defensive strategy?
- 5:15pm: Closing comments by: Sherrida Traynham, Senior Vice President, HR, Clarion Partners

Day Two - October 20, 2021

3pm-5pm ET

- 3pm: Welcome comments by: Justinn West-Wheatley, BentallGreenOak
- 3.05 pm: Total Rewards Trends & Impact on Returning to Office: Post-Pandemic Market Realities, Compensation Benchmarking & Retention Strategies
 - 2-3 consultants discuss total compensation and benefit trends post-Covid and highlight recruitment and departure rates within real estate investment management, 1-hour, 15 mins presentation by each firm followed by open-room Q&A
 - Introduction by: Jillien Miller, Human Resources Coordinator, Waterton Associates
 - Presentations by:
 - Carrie Khan, Senior Director, Willis Towers Watson
 - Erin Green, Managing Director and Head of Management Consulting, Ferguson Partners
 - Austin Morris, Managing Director, Compensation Consulting, Ferguson Partners
- 4.20pm: Managers-only, post-discussion best practices sharing
 - What adjustments and changes will you need to make in your recruitment process in order to stay competitive?
 - How are you executing on-campus recruitment? What is working, and what isn't working?
 - Will you be able to trade compensation for flexibility? To what extent is that feasible in today's labor market?
- 5pm: Closing comments by: Deena Goodman, Director, Human Resources, PGIM Real Estate