

2023 Data & Information Management Meeting

Hotel Magdalena, 1101 Music Lane, Austin, TX | September 14

THURSDAY, SEPTEMBER 14	
8am	Breakfast
8:45am	<p>Welcome comments: NAREIM Data & Information Management Committee</p> <p>Chair: Pete Schow, Executive Director Head of Data, Affinius Capital Co-Chair: Sach Diwan, Global Head of Product, LaSalle Investment Management</p>
9am	<p>Data governance vs. Data management — Part 1: Education & training</p> <p>Session leaders: Sach Diwan, Global Head of Product, LaSalle Investment Management Armel Traore dit Nignan, Head of Data & Analytics, Principal Asset Management</p> <p>Speakers: Lauren Stokes, Director, Data Governance, Nuveen Real Estate Jean Hixson, Director, Data Strategy & Analytics, Principal Asset Management</p> <ul style="list-style-type: none"> • <i>Member case studies on furthering education, data literacy and defining clear goals across your Data Governance and Management teams.</i> <p>Format: 25-minute case studies, 35-minute Q&A and whole room</p>
10am	Break
10:15am	<p>Data governance vs. Data management — Part 2: Establishing a program</p> <ul style="list-style-type: none"> • <i>At roundtables, members will be assigned a mock scenario and create an action plan for implementing a data governance program.</i> <p>Format: 25-minute exercise, 20-minute whole room</p>
11am	<p>Data models: Aligning for performance reporting</p> <p>Speakers: Jennifer Allard, Manager, Real Estate Portfolio Analyses and Technology, HOOPP — Healthcare of Ontario Pension Plan Michael Craft, Director of Data Strategy, Stockbridge Capital Group</p> <ul style="list-style-type: none"> • <i>Members discuss the intricacies of streamlining data models from the GP and LP perspectives, looking at operations, regulatory and investor reporting.</i> <p>Format: 5 minute-polling, 20-minute presentation, 20-minute exercise, 15-minute whole room</p>
12pm	Lunch
1pm	<p>Stakeholder engagement: How does technology become a partnership?</p> <p>Speakers: Pete Schow, Executive Director Head of Data, Affinius Capital Scott Cross, Director of Reporting & Analytics, Nuveen Real Estate</p> <ul style="list-style-type: none"> • <i>At roundtables, members will discuss with their peers and fill out a matrix for stakeholder engagement and artifacts by business units and job functions.</i> <p>Format: 15-minute presentation, 15-minute exercise, 15-minute whole room</p>
1:45pm	<p>Technology & innovation spend</p> <p>Speakers: Mike Goodwin, Chief Technology Officer, Stockbridge Capital Group Jason Dean, Chief Operating Officer, Pennybacker Capital</p> <ul style="list-style-type: none"> • <i>Unveiling of the 2023 results of NAREIM's Technology & Innovation Spend member survey covering budgets, dedicated employees, MSPs and more.</i> <p>Format: 5-minute polling, 20-minute research analysis, 20-minute whole room</p>
2:30pm	Break



AGENDA

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THURSDAY, SEPTEMBER 14 <i>continued</i>	
2:45pm	Innovations for the future
	<p>Session leaders: Blake Walker, Director, Strategy & Research, The Green Cities Company Doug Prickett, Senior Managing Director of Investments & Analytics, Transwestern Investment Group</p> <p>Speakers: Kelly Sooch, Senior Associate, Data Analytics, Pennybacker Capital Robb Fitzsimmons, Managing Director, The Linnaean Company</p> <ul style="list-style-type: none"> How can firms utilize the latest technologies to make better investment decisions? Member case studies showcasing the successes and challenges of using machine learning, language models, heat map indexes and ChatGPT. <p>Format: 20-minute presentations, 15-minute Q&A, 10-minute exercise, 15-minute whole room</p>
3:45pm	Closing comments
4pm	End of meeting

2023 DATA & INFORMATION MANAGEMENT COMMITTEE

NAREIM thanks the 2023 Data & Information Management Committee members, including:

Chair: Pete Schow, Affinius Capital; **Co-Chair:** Sach Diwan, LaSalle Investment Management; **Francesco Munaco**, Alidade Capital; **Josh Glastein**, Berkshire Residential; **Jennifer Allard**, HOOPP — Healthcare of Ontario Pension Plan; **Andrew Dwyer**, Juniper Square; **Scott Cross**, Nuveen Real Estate; **Jason Dean**, Pennybacker Capital; **Armel Traore dit Nignan**, Principal Asset Management; **Mike Goodwin & Michael Craft**, Stockbridge Capital Group; **Doug Prickett**, Transwestern Investment Group; **Blake Walker**, The Green Cities Company; **Scott Tavolacci & Eileen Clifford**, Yardi Systems

For 30 years, NAREIM has been the home of real estate investment management benchmarking and best practice education. Our focus is on peer-to-peer networking, where the only conversations are candid and brutally honest. You come to NAREIM to understand what is working and what is not working among peers. NAREIM is where you understand what the industry is really thinking.

NAREIM represents 12 functional areas within the real estate investment management firm, providing in-person and virtual connections for each group throughout the year:

- Acquisitions • Architecture & Engineering • Asset Management • Capital Raising & IR • Data & Information Management • DEI • Sustainability • Executive Officer • Legal, Compliance & Risk • Marketing & Communications • Portfolio Management • Talent Management

NAREIM CALENDAR 2023–2024		
September 13–14	Data & Information Management	Austin
September 20–21	Architecture & Engineering	Chicago
October 4–6	Executive Officer	Park City
October 18–19	Talent Management	Chicago
November 8	Legal, Compliance & Risk dinner	NYC
December 6–7	Capital Raising & IR	NYC
January	Portfolio Management dinner	NYC
March 5–6	Sustainability	Atlanta
March	Black Real Estate Roundtable	TBD
April	Latinx Real Estate Roundtable	NYC
April	Legal, Compliance & Risk	Virtual
May	Marketing & Communications	Virtual

Please note, virtual meetings are organized at the request of functional group committees and will be scheduled through 2024. Please check the NAREIM website regularly for more details. www.nareim.org