



**Urban Land
Institute**

Advisory Services Program

Gallatin Valley, MT

City of Belgrade, City of Bozeman, Gallatin County

Advisory Services Panel

October 15 – 20, 2023

Biographies

Panel Chair



Alan Razak
Principal and Co-founder
AR Spruce LLC
Philadelphia, Pennsylvania

Alan's background in commercial real estate encompasses development and project management, finance, architecture, and feasibility/planning analyses. He has extensive experience managing the development process, both as owner and as a fee developer, and with use types including residential, office, and retail, as well as specialized expertise with highly technical facilities such as data centers. Alan currently manages a sensitive renovation and restacking project for the American Philosophical Society, in addition to providing strategy and planning support for various clients of the firm, and advising on design and construction contracts.

Alan led the development of the 76ers training and headquarters complex, one of the first projects to take advantage of the extraordinary Grow NJ tax credit program. He was Principal in Charge of development management for the Cheslen Visitor Center for Natural Lands Trust, as well as for a strategic facilities plan and team assembly, contracts and initial project setup for Montgomery County, which encompassed approximately \$300 million of work on County properties and the downtown core of Norristown, PA. Other projects included a study for the Children's Hospital of Philadelphia of its mission-critical data centers which enabled CHOP to avoid creating a new \$20 million data center, and transaction management for land at Fulton and Flatbush in Brooklyn, NY, tripling the anticipated proceeds for the seller.

Alan founded Razak Company in 2003, where he developed projects such as Pembroke North Condominium, Main Line Jaguar Land Rover, 5035 Ritter Road for the Administrative Office of PA Courts, and the Curtis Institute of Music's Lenfest Hall, where he restarted an over-budget project and saved \$12 million. He provided early-phase planning or forensic analyses for projects at Swarthmore College, Citadel Investments, the Rock School of Dance, and Vanguard. Prior to forming Razak Company, Alan was a Principal with Radnor Advisors, which was subsequently purchased by Insignia/ESG. There he was worldwide Director of the Technology Practice Group and managed the Philadelphia office's real estate consulting group. During the early 1990s, Alan focused on international real estate development, along with technical consulting services for government and domestic financial institutions. For much of the 1980s, he was a Partner at Rouse and Associates (later Liberty Property Trust), where he managed urban development projects in Washington and the Philadelphia region, including work on Philadelphia's Penn's Landing.

(Razak bio continued)

Selected Affiliations:

- Registered Architect, Pennsylvania
- Philadelphia Shakespeare Theatre: Chairman of the Board
- Urban Land Institute, global: Global Governing Trustee; past Chair Responsible Property Investment Council, Chair of multiple Advisory Services Panels, DEI Council working group chair, and for over 20 years author and teacher of ULI Learning professional education workshops on a variety of real estate development topics
- Urban Land Institute, local: Philadelphia District Council: current Governance Committee Chair, past Chair, past Chair of Mission Advancement
- University of Pennsylvania, Weitzman School of Design: Lecturer, Design & Development

Education:

- Massachusetts Institute of Technology: S.B. in Arts and Design
- University of Washington: Master of Architecture
- Wharton School, University of Pennsylvania: MBA with a concentration in Real Estate

Panelists



Laura Bonich, PE, LEED AP
Consulting Engineer
Bonich Associates
Jackson, Wyoming

Laura has 35 years of experience primarily in project planning and entitlement with an emphasis on horizontal infrastructure and infrastructure sustainability for water, wastewater, reclaimed water, drainage and transportation. She has provided strategic planning approaches to all aspects of land development projects, including physical and policy land planning, infrastructure master planning, design, financing, entitlements, sustainability, permitting, and regulatory compliance. She has worked on the due diligence, acquisition, entitlement, master planning and design of over 100,000 single-family lots and thousands of square feet of commercial, mixed use and redevelopment projects in 11 states. Working in numerous town and county jurisdictions has given her a broad understanding of the impacts of growth and the importance of land use regulations and zoning. She emphasizes the practical implementation of sustainable design practices for infrastructure.

Laura lives in Jackson, Wyoming where she serves as chair of the Affordable Housing Supply Board and on the Energy Conservation Works Board (a partnership between the local energy company, Town and County). Laura spent 20 years as a full member of the Urban Land Institute, is a past branch president of the American Society of Civil Engineers, was a member of the Institute for Sustainable Infrastructure's National Technical Committee for the Envision rating system and a member of the Harvard Graduate School of Design Sustainable Infrastructure Advisory Board. Laura also worked directly on the development of the LEED for Neighborhood Development rating system. Laura has a bachelor's of science in Civil Engineering from the University of Washington and an MBA from National University.



Lucia Garsys, FAICP
Senior Advisor on Community Partnerships
Hillsborough County
Tampa, Florida

Lucia's' experience has focused on the intersection of land use, infrastructure, and public funding. This gives her unique insight into effective public private partnerships to balance community needs and developer interests.

Lucia currently serves as Senior Advisor on Community Partnerships in Hillsborough County, FL leveraging institutional interests to build emerging innovation districts. In the past decade, she served as the executive administrator for the County's land planning and development as well as its cradle-to-grave capital operations and programs. She directed 2,000 employees with a \$500 million operating budget and a \$1 Billion capital portfolio to balance diverse needs of a growing community.

Her prior consulting experience includes land use and comprehensive planning; downtown revitalization with tax increment financing; developer recruitment; and fiscal impact analysis in the Chicago Metro area and Fairfax, VA. She consulted on economic development initiatives with communities throughout the U.S. Lucia advised emerging democracies in Eastern Europe on transparent and open land development and planning processes.

Lucia is an active member of ULI having served as Governance Chair for ULI Tampa Bay and past Chair of its Management Committee. She served as a panelist on a half dozen Advisory Services Panels and local Technical Assistance Panels. In Hillsborough County she hosted two Advisory Services Panels. She served as a juror for the Americas and Global Excellence Awards and engages in national initiatives focused on the role Infrastructure and land use.

In the past, she served as a juror for AICP's Student Awards, and as a Board member on and advisor to the Board on the Built Environment of the National Research Council, and on the Advisory Board for the Planning program at the University of South Florida. She routinely mentors students and women in the real estate and kindred fields.

Lucia holds a B.S. in City and Regional Planning from the Illinois Institute of Technology and a Masters in Urban and Regional Planning from the University of Illinois at Urbana-Champaign. She is a Fellow of the American Institute of Certified Planners.



Molly McCabe
CEO
HaydenTanner
Big Fork, Montana

Molly McCabe is CEO of HaydenTanner, a strategic real estate development and advisory firm driving impact investment & sustainability in the built environment. The firm takes a people-centered approach and triple bottom-line focus to ensure projects are sound investment opportunities while creating healthy, resilient buildings and vibrant, sustainable communities. She has a specialized focus on ESG factors including climate risk, resource efficiency, carbon tracking, resilience, health, and wellness.

Experienced in leading through complexity, she has also helped launch and guide several start-ups, new ventures and change management initiatives.

Molly is co-founder and board member of The Lotus Campaign, providing housing-driven solutions for homelessness and sits on the boards of The Freshwater Trust and City Craft Foundation.

Past Chair of Urban Land Institute's (ULI) Responsible Property Investment Council, founder of a VC funded, commercial mortgage-backed securities firm, and manager, institutional real estate capital markets group. Author: "Practical Greening: The Bottom Line on Sustainable Property Development & Investment." "Financing and Driving Value: Responsible and Resilient Property Investing in the New Millennium."

Industry leader on investment, climate change, social-impact, and resilience. Mom, dog-lover, amateur "handy-woman," serial entrepreneur.



Gretchen Milliken
Consultant
Planner—Architect—Designer
Park City, Utah

Gretchen Milliken is an urban planner, architect, designer, and currently leads several affordable housing developments in Park City and Moab, Utah. Prior to her involvement in affordable housing, Gretchen served as Planning Director for Park City Municipal where she oversaw all land-use planning, historic preservation efforts, and planning applications. Gretchen moved to Utah in 2020 following an 8-year stint as the Director of Advanced Planning and Sustainability for Louisville (KY) Metro Government where she led several significant city-wide planning initiatives, namely Vision Louisville, an innovative and transformative 25-yr plan for future growth; MOVE Louisville, a strategic multi-modal transportation master plan; and Vision Russel, a \$30M HUD Choice Neighborhood Initiative to implement a mixed-income, multi-generational housing and mixed use to one of the City's most impoverished neighborhoods. While in Louisville, she also participated in the ULI Rose Fellowship and started the Kentucky ULI District Council.

A transplant from Stockholm, Sweden where architecture and urban planning are synonymous with smart and sustainable growth, Gretchen brings a holistic approach to her work with a focus on people, sustainability and the built environment. Over her career, she has accumulated a diverse resume of architectural projects along with long- and short-term planning initiatives, regional planning, multi-modal strategic planning, sustainability, climate resiliency, resort planning and comprehensive plan updates.



Kim Morisaki, CEcD
Executive Director
Northwest Montana Community Land Trust
Kalispell, Montana

Kim's family has been in the Flathead Valley for six generations. Her family has been building homes in the Flathead Valley for three generations and both of her grandfathers were independent businessmen. So, after four years at Claremont McKenna College in California, she headed off to Japan for an adventure in Montana's sister-state, Kumamoto, and found herself running a business importing Montana and American goods. For several years she imported building materials for Japanese contractors and architects who wanted to build American-style homes. After marrying Yuji Morisaki she convinced her husband that life would be more fun in Montana where the mountains were beautiful, and the lakes were plentiful.

After returning to Montana in 2003 she worked at Artisans Doors of Montana and her sales region included Bozeman, Big Sky and Jackson Hole. Having studied economics in college she decided to make a career change and moved to Montana West Economic Development and Flathead County Economic Development Authority where she helped new businesses launch and existing businesses expand. Her favorite project was working with the City of Kalispell to lay the groundwork for the new Parkline Trail that took 10 years to bare fruit but was worth every minute. In 2020 she started her own consulting business Morisaki Strategic Solutions and then found her new passion, leveraging all available tools to expand the inventory of affordable housing in NW Montana, and took the executive director's position at Northwest Montana Community Land Trust.

She spends her free time serving on boards for youth sports organizations and Samaritan House and fundraising for favorite causes. She likes cheering for her two sons' various endeavors, growing flowers and occasionally trying to help her friends get elected to public office.

Northwest Montana Community Land Trust

The mission of Northwest Montana Community Land Trust, Inc. (NWMTCCLT) is to provide permanently affordable homeownership opportunities for low- and moderate-income families in the Flathead Valley and Northwest Montana. Our focus on attainable workforce housing through the Community Land Trust model of a ground lease combined with private home ownership is one solution to the challenge of maintaining reasonably priced homes for working families and retired individuals. It is a nonprofit organization that leases land to private homeowners to ensure that a one-time community investment in property results in affordable housing prices in perpetuity.

NWMTCCLT currently owns the land under 52 homes in Kalispell. Our organization is working to add homes in Kalispell, Columbia Falls, Whitefish and Polson. CLT homeowners are able purchase their home at below market rates, but also share in all of the traditional advantages of home ownership including recouping their 100% of their equity plus 25% of the increase in appraised value since they purchased their home.



George Ruther, AICP
Director of Housing
Town of Vail
Vail, Colorado

George Ruther is the Director of Housing in Vail, Colorado with nearly 30 years of mountain resort community development experience. Capitalizing on his extensive community development experience, George transitioned to lead and direct the Town of Vail's newly formed Housing Department. Under his leadership, the Housing Department is directly responsible for policy development; housing regulation implementation, deed restriction compliance and oversight; lottery administration; program administration; and managing housing developments and initiatives which increase the overall supply and availability of housing opportunities within the community and the region. Since its formation in 2018, the Housing Department has aided the community in realizing a 53% increase in the total number of deed-restricted homes in Vail with an additional 600 homes currently in the pipeline. The availability and affordability of housing remains, however, the #1 most critical issue facing the Vail community.

Throughout his public sector career, George has lead and directed the successful outcome of Vail's most complex, challenging, and critical community initiatives. Most recent examples include:

- the \$25M redevelopment of Timber Ridge Village Apartments which ensures deed- restricted, for-rent, homes for as many as 230 seasonal and permanent Vail residents,
- the \$30M development of the Residences at Main Vail which upon completion will provide 72 new for-rent, deed-restricted homes in the center of Vail.
- the master planning and the successful completion of the \$22M Chamonix Vail Neighborhood – “Vail's Newest Neighborhood for Families” comprised of 32, two and three bedroom, for-sale townhomes,
- the adoption of the Vail Housing 2027 Strategic Plan, a bold effort to secure as many as 1,000 new deed restrictions in Vail by the year 2027,
- the successful creation, implementation and launch of Vail InDEED, an innovative deed-restriction acquisition initiative sponsored by the Town of Vail and administered by the Vail Local Housing Authority, which has been described as an innovative and bold new approach to addressing the housing challenges in Vail. Since adoption, Vail InDEED has produced more than 175 new deed restrictions and homes for approximately 384 Vail residents. The Vail InDEED program was the recipient of the 2020 Robert C. Larson Housing Policy Leadership Award given by the Urban Land Institute.
- the passage of the Town's first local sales tax increase in 47 years dedicated to fund housing solutions for the Vail community.

Ruther bio continued

HousingColorado recognized George for innovation and leadership in affordable housing solutions with the 2019 Eagle Award acknowledging his work to ensure safe, fair, and affordable homes for all Coloradans.

George earned a B.S. degree in Public Administration and Policy Analysis from the University of Wisconsin and a Master's degree in Urban & Regional Planning from the University of Colorado. He is an active member of the American Institute of Certified Planners, American Planning Association, HousingColorado, and the Urban Land Institute.



Scott Schoenherr
Development Partner
Rafanelli & Nahas Management
Boise, Idaho

Scott Schoenherr leads Rafanelli & Nahas' Intermountain operation and has developed or acquired nearly two million square feet of property in the Boise Area. Rafanelli & Nahas focuses on class-A office buildings in the downtown core. They are the largest property owner in Downtown Boise. Rafanelli & Nahas also develops and manages multi-family projects in California and Idaho.

Scott received his B.A. from Michigan State University and an M.B.A. from the Harvard Business School. After business school, Scott relocated to the San Francisco Bay Area where he joined Spieker Properties. At Spieker, Scott handled leasing, construction, acquisitions, and management of office and industrial properties in San Francisco's East Bay. Later, Scott started Crucial Technology, a division of Micron Technology (NYSE:MU). Under his leadership, Crucial's sales grew to over \$500 million annually.

Scott has competed in several Ironman Triathlons, climbed the tallest peak in the Americas and finished in the top 1% in the Portland Marathon. He spends his free time Nordic skiing, riding his bike and sipping Jack Daniels. Scott is actively involved with the Children's Home Society of Idaho and several other Idaho charities. He is also active in BOMA, the Downtown Boise Association and the Urban Land Institute.

ULI Project Staff



Lauren McKim Callaghan (*panel project manager*)
Senior Director, Advisory Services
ULI – the Urban Land Institute
Prairie Village, Kansas

Lauren McKim Callaghan is the Senior Director for the Advisory Services Program at the Urban Land Institute (ULI). Prior to joining ULI, Lauren managed survey research projects for the Eagleton Center for Public Interest Polling at Rutgers University for a range of clients from community organizations to state agencies. Lauren has also worked in more than 15 communities across the central and eastern United States as a market analyst and planner with RKG Associates, Inc., a real estate and economic planning consulting firm. While at RKG, she provided analysis and reports for a range of projects including economic development strategic plans, multi-neighborhood revitalization efforts and housing studies. Lauren's professional experience also includes work in commercial property management and teaching.

Lauren holds a Master of City & Regional Planning from Rutgers University with an emphasis in housing and real estate and is a graduate of ULI Washington's Regional Land Use Leadership Institute. She has an undergraduate degree in history and psychology from the University of Kansas and is a native Midwesterner. Prior to joining ULI, she was an active member of the ULI Washington Young Leaders Group serving on and chairing several committees.



Barbra Gustis, CMP (*logistics management*)
Director, Advisory Services and Key Leaders
ULI – the Urban Land Institute
Philadelphia, Pennsylvania

Barbra is a team member with ULI advisory services, supporting the panel programs with their logistics and operations. She launched her career training with Walt Disney World and Hyatt Hotels, then moved onto various roles in event and convention planning, exhibition sales, and educational programming and development with the American Association of Colleges of Pharmacy and Destinations International. With over 20 years of experience in the business of meetings industry, she brings her logistician and leadership skills to each program and event executed. Having a strong interest in travel and people connecting in meaningful ways, she can leverage her career using her passions. A Peloton cycling enthusiast, she also belongs to outdoor road cycling clubs, enjoys listening to Podcasts, golfing, hiking, snowboarding, spending time with family and friends, and experimenting with new cooking recipes at home. Barbra is credentialed as

All biographies as of 10/10/23

a Certified Meeting Professional (CMP), and holds undergrad and graduate degrees from East Stroudsburg University, East Stroudsburg, PA.



Karlee May
Executive Director
ULI District Council- Montana/Idaho
Boise, Idaho

Karlee May is the Executive Director of the Urban Land Institute’s Idaho & Montana District Councils. As director, Karlee oversees the ULI program of work in both states, ensuring alignment with ULI’s initiatives and mission priorities, with a focus on regional priorities. Karlee works with communities, members, and stakeholders to grow engagement and membership in both

regions, and partners with both local and national councils to provide valuable impact throughout.

A Boise, Idaho native, Karlee has experience working in both nonprofit and public spheres around community building, public events, placemaking, and outreach, and has shared that experience through leadership roles in her community for many years. Karlee has a passion for people and places, emphasizing forming connections and developing mutually beneficial partnerships while organizing public and private events. Throughout her professional career Karlee has served on various committees and held chair roles with local nonprofits and community groups.



May Chow
Senior Vice President
ULI Asia Pacific
Central, Hong Kong

As senior vice president, May Chow oversees ULI programmes and various corporate initiatives in the Asia Pacific. She also supports the local council network to ensure quality and alignment in ULI’s programme of work across the region. May has taken up this new role in July 2020 as ULI

continues to grow in the region, which requires a more dedicated resource to deliver deeper engagement with members and stronger impact on communities.

May joined ULI - the Urban Land Institute in 2016 as Senior Vice President of Marketing and Communications, in charge of branding, marketing, and communications initiatives in the Asia Pacific. She expanded her role to head membership in 2018 taking an integrated approach to engage, retain, and recruit members.

May’s career spans across journalism, media, corporate communications and marketing. The breadth and depth of her experience makes her a strategic leader and a resilient business partner who constantly drives growth and development.

Having lived in Asia, Europe and the United States, May thrives in a multi-cultural environment. She embraces people and cultures, with passion to build teams for success.



Kelly Annis
Report Writer
Principal, Branch Communications
St. Louis, Missouri

Kelly Annis is the principal of Branch Communications, a marketing and communications firm focusing on the real estate industry.

With a passion for cities and responsible land use, Kelly frequently provides technical writing and design services for the Urban Land Institute, a global nonprofit organization with a mission to shape the future of the built environment for transformative impact in communities worldwide.

With over 12 years of experience running the St. Louis office of ULI, Kelly has a keen understanding of ULI's goals, global mission, membership base, and the services the ULI district council network needs as it works in and with communities to shape the future of the built environment.

Prior to her work with ULI, Kelly was Client Relations Manager for a mid-sized business and real estate law firm in St. Louis and the Marketing Director for the Rosemary Beach Land Company in Rosemary Beach, Florida. In both roles, Kelly was a member of ULI, where she learned to further appreciate great urban design and the value of the historic and authentic urban fabric that made up her hometown of St. Louis.

Kelly earned a B.A. with Honors, magna cum laude, from Drury University. She has also completed a number of certificate programs through the Urban Land Institute and recently earned a Chancellor's Certificate in Economic Development from the University of Missouri-St. Louis.

Kelly and her husband, Mike, live in St. Louis, Missouri, with their son Lukas. In addition to her passion for the Midwest, Kelly enjoys hiking with her son and dog and riding her horse through the Missouri woods.