

Bergstrom Center for Real Estate Studies

Bergstrom Center & Scholarship Sponsors

The generosity of the following individuals enable the Bergstrom Center and the real estate academic programs to leverage the University's rich history in real estate research, education, and strategy to build ever greater momentum.

The following levels include state and corporate matching gifts:

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- Stiles Corp.

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- John Crossman (Crossman & Co.)
- Edgar Jones (Rockefeller Group Development Corporation)
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- Clay County Port, Inc.
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- Starwood Land Company LLC
- Stornoway Co. LLC
- Stumpy Harris
- SunTrust Banks, Inc.
- Howard Taft
- Tarragon Corp.
- Templeton Group LLC
- Transworld Investment Corp.
- Ustler Properties, Inc.
- The Viera Co.
- Viridian Development LLC
- Wachovia Corp.
- Wakefield Capital Management, Inc.
- Michael P. White
- Woolbright Development, Inc.
- Wragg & Casas Public Relations, Inc.

For information on making a gift to the Bergstrom Center, go to www.realestate.ufl.edu and click on "Support Real Estate at UF."



Wayne R. Archer, PhD
Professor and Executive
Director, Bergstrom Center
for Real Estate Studies



David Ling, PhD
William D. Hussey Professor
Director, Nathan S. Collier
MSRE Program

Real Estate Research, Education, Strategy

The Bergstrom Center exists to support the University of Florida's real estate academic programs. This is captured in our mission statement:

The Bergstrom Center for Real Estate Studies is a catalyst and vehicle for bringing real estate students and real-world experience together, to create the opportunity for students to develop the knowledge, skills and contacts necessary for a successful career, to provide industry with graduates who have solid preparation in classical thinking and communication as well as practical experience, and to identify significant changes in the real estate industry and help recognize the implications for real estate choices.

In this mission, the Bergstrom Center addresses unique needs of the real estate industry. Like any vibrant industry, the real estate industry regularly needs "new blood." For leadership it needs not only able and motivated persons, but it needs them to have solid preparation in classical thinking and communication. But more than with most industries it also wants experience. As a result, there is a demand for the paradoxical combination of fresh but "experienced" talent. Therefore, a major function of an academic real estate program is to provide this vicarious experience through an effective mix of classical academic courses complemented with a range of exposure to live case studies. The Bergstrom Center accomplishes this.

The most important product of any business school for any field is its graduates, and this certainly is true in a field such as real estate. We are pleased to report that the Bergstrom Center has taken important strides in its contribution to that product during the last year. In particular, three landmark gifts presented this year have fundamentally changed the direction and pace of our programs. Endowments from Kelley Bergstrom, Nathan S. Collier, and Ken and Linda McGurn fueled momentum for the Center, faculty support, and our Master of Science in Real Estate (MSRE) program, respectively. These gifts are the new foundation supporting UF's real estate legacy, and a harbinger of exciting things yet to come. Already, the energy, commitment, and momentum expressed in these gifts have begun to manifest in new initiatives in the Bergstrom Center and in our real estate programs, as revealed in this report.

It has been a watershed year for the Bergstrom Center and our real estate programs, and we look forward to new levels of accomplishment in the years to come.

"Three defining endowment gifts in 2006-07 created a new foundation for UF's real estate legacy."



Kelley A. Bergstrom Center for Real Estate Studies

While real estate degrees have been offered at UF for over 50 years, this year we were honored to name our center after a long-time champion of these academic programs. The Bergstrom Center for Real Estate Studies at UF is widely known for the rich synergy it fosters between research, academics, and industry leaders who drive the dynamic real estate marketplace.

UF Real Estate Advisory Board member Kelley A. Bergstrom with some members of the MSRE Class of 2007: (L to R) Brett Gelsomino, Catey Vaughn, Mallory Minichbauer, Ken Joines, Catarina Soares, Jonathan Thomas, Joe Furst, and Trey McPherson

UF Real Estate Advisory Board

The UF Real Estate Advisory Board plays an active role in our graduate students' education, including serving as mentors to students in UF's real estate academic programs, providing significant scholarship assistance, hosting student field trips, and serving as guest lecturers during case studies classes. Key accomplishments this year include:

- Membership grew from 120 to 140 members (membership cap set at 150)
- Regional meetings initiated for Board networking
- Efforts made to support UF-FARE activities

Read more at www.realestate.ufl.edu, click on Real Estate Advisory Board.



"Working with MSRE students is one of the most rewarding aspects of Board membership. And thanks to the real-world/case-study-rich curriculum UF offers, these graduates are light years ahead of others entering the marketplace. I'm proud to be involved with this program."

— Advisory Board member Duane Stiller,
Woolbright Development Corp., with MSRE students

Regional Advisory Board gatherings organized in 2006-07 helped generate broader and more meaningful participation by Board members across the state.

2007-08 BOARD LEADERSHIP

CHAIR Chuck Davis

Director, MetLife Real Estate Investments

VICE-CHAIR Steve Cohen

Exec Vice President/ Regional Manager – Private Wealth Management, SunTrust Bank

PAST CHAIR

Edgar C. Jones, Jr.

VP & Director of Florida Operations, Rockefeller Group Development Corp.

Kelley Bergstrom

Managing Partner, Bergstrom Investments

Rich Bezold

Shareholder, Akerman Senterfitt

Angela Brown

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Jim Fried

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Jim Izzo

Managing Principal, The 1220 Group

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Senior Partner, Heidrick & Struggles

David Rattner

Vice President, Development, North American Properties

Al Rex

President, Collatera Real Estate Capital, LLC

Craig Sher

President/CEO, The Sembler Company

Jim Stine

Chief Investment Officer, Stiles Corporation



Izzo



Collier



Strickland

Case Studies Contributors, 2006-7

Jim Izzo, The 1220 Group

Excel and ARGUS-based case studies

Nathan Collier, Paradigm Properties

Leadership and negotiation

Blaine Strickland, Mainsail Development

Salesmanship and personal planning

The Survey gained visibility in 2006-07, as the number of respondents grew to over 300.

Survey of Emerging Market Conditions

A major initiative of the Bergstrom Center is the quarterly *Survey of Emerging Market Conditions*, which gathers insights from Florida's real estate development and investment leaders, and tracks important market parameters and indicators at both the state and metropolitan level. A unique feature of the *Survey* is its ability to detect quarterly changes in the investment and development climate for Florida real estate.

The Bergstrom Center invites participation from a select group of the state's real estate community who have the experience and expertise to respond to the survey instrument. Since the initial fielding in late 2005, survey respondents have increased from 47 to over 300. The results of each quarter's survey are now regularly covered in most major Florida newspapers, as well as in the broadcast media. An on-going challenge to the Bergstrom Center's ability to realize the Survey's full potential is sustainable funding.

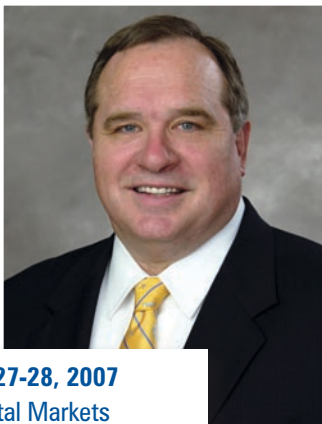
Beginning with the first quarter 2007 results, commentary from the *Survey's* editorial board is being podcast worldwide. For more information, go to <http://www.cba.ufl.edu/podcasts/UFRealEstateSurvey/index.asp>.

More details are available at www.realestate.ufl.edu, select Survey of Emerging Market Conditions.

Annual UF Real Estate Trends & Strategies Conference

The Trends & Strategies Conference is held in Gainesville each Fall, in concert with a home football game. In addition to traditional conference informational sessions, the weekend includes a number of networking opportunities for attendees to meet industry leaders, including a golf outing, cocktail reception, and football tailgate party.

For information and to register, click on Trends & Strategies Conference at www.realestate.ufl.edu.



September 27-28, 2007
Theme: Capital Markets
Keynote address by Jim Seneff,
Chairman & CEO, CNL Financial
Group, Inc.



September 2006
Theme: Florida's Insurance Crisis
Attendance: 230 (record number)

*Industry leaders panel
(l to r): Advisory Board
members John Crossman,
Tim Peterson, Rob Gidel,
and Kelley Bergstrom,
moderator Wayne Archer*

UF Friends & Alumni of Real Estate (UF-FARE)

UF-FARE was organized in 1994 to enable alumni and friends of the University pursuing a real estate career to stay in touch and remain connected with UF. Today the UF-FARE network includes over 1,000 members.

The group gained significant momentum this year by designating regional Captains, each of whom is working to develop the UF-FARE network in his or her local area. Most regions organized networking events to foster interaction between UF-FARE members, as well as the Advisory Board and graduate students. These steps are helping to create a more robust program in support of the real estate students and academic initiatives.

UF-FARE Captains

Central Florida	Daniel Byrnes, Isola & Associates, Inc.
Gainesville/Ocala	Beau Beery, AMJ, Inc.
Jacksonville	Christian Baker, Atlantic Coast Developers
Florida Panhandle	Jacob Fish, The St. Joe Company
South Florida	Bryson Ridgway, Stiles Corporation
Southwest Florida	David Rattner, North American Properties
Tampa/St. Pete	Garritt Bader, HuntDouglas Real Estate Services
Georgia	Scott Moore, The Medallion Group
Out of area	Rachel Elias Wein, Ernst and Young



Bryson Ridgway (MSRE 2006), Stiles Corporation, Captain, UF-FARE South Florida region, shown here with UF-FARE Member David Metalonis, Advisory Board member Rod Castan, MSRE Student Catey Vaughn, and Advisory Board member Avery Klann at the Miami Spring Fling networking event.

“The UF-FARE network plays a crucial role in career development for ambitious real estate professionals.”

— Bryson Ridgway (MSRE 2006),
Stiles Corporation, Captain, UF-FARE South Florida region

UF-FARE was energized in 2006-07 through creation of a formal grassroots structure, led by recent graduates of the MSRE program.



Regional Events

Fall 2006

- Orlando (Sept. 2006) – cocktail reception
- Tampa (Sept. 2006) – cocktails and bowling
- Miami and Boca Raton (Oct. 2006) – steak dinners
- Jacksonville (Nov. 2006) – reception and speaker

Spring 2007

- Miami (Spring Break, March 2007) – cocktail reception, followed by Board dinner
- Gainesville – monthly reception/presentation with Professional People in Real Estate (PPiR)
- Orlando – (April 2007) watched Gator basketball

UF-FARE members are an important part of UF's real estate network, serving as peer mentors to current students, as well as resources for Advisory Board members and Bergstrom Center staff. Networking events throughout the state create opportunities for real estate professionals at various stages of their careers to come together to share ideas.

Pre-Licensing Course

Several years ago, UF's real estate faculty recognized a gap in services provided to people wanting to enter the industry as licensed real estate sales associates in Florida. Although more than 30,000 people take a state-mandated Florida Real Estate Commission course each year, roughly half of them fail the subsequent licensing exam. This year, the University's state-of-the-art online course delivery capabilities, coupled with the Bergstrom Center's subject matter expertise, provided a new option for Florida license-seekers worldwide.

Launched in late 2006, UF's Florida Pre-Licensing Course operates from www.realestate.centers.ufl.edu. This is the state's first and only high-quality online real estate education option. It offers students:

- Flexible schedule to accommodate current job
- Ability to work at an accelerated pace
- Ability to rewind and replay video lectures as needed
- Immediate feedback on progress tests

Go to www.realestate.centers.ufl.edu for more information or to register.



Online instructor Kent Malone presents lectures for pre-licensing students all over the world. Mr. Malone has extensive experience in real estate sales and brokerage, as well as over a decade of teaching the numerous State-mandated real estate licensing courses.

This year's launch of the online pre-licensing course has provided the first *true* distance learning option to Florida license seekers, with worldwide, any-time access.

Alfred A. Ring Distinguished Speaker Series

Prominent industry professionals come to campus each academic year to speak to and meet with UF faculty and students as part of the Alfred A. Ring Distinguished Speaker Series.

In addition to providing in-depth lectures, these speakers also meet with graduate students in a small group session to discuss issues of interest to the group.

This year these lectures are also being podcast to a worldwide audience. To subscribe to the Ring Real Estate Speaker Series podcasts, go to <http://www.cba.ufl.edu/podcasts/RingRealEstateSpeakers/index.asp>.

For a list of names, dates, and topics of 2007-08 Ring Speakers, click *Ring Speaker Series* at www.realestate.ufl.edu



Advisory Board member Jim Motta addresses UF real estate students during his Ring Speaker presentation in April 2007

2006-07 Ring Speaker Series

Duane Stiller*

President, Woolbright Development Corporation
"The Entrepreneurial Approach to Successful Retail Property Investment in Florida"

Chuck Davis*

Director, MetLife Real Estate Investments
"Relative Value and the Real Estate Asset Class"

Dennis Gilkey*

President and CEO, Bonita Bay Group
"Real Estate Development in Florida — Where is it Going?"

Mitchell Rice*

CEO, RMC Property Group
"Mixed-Use Development: What Works, What Doesn't, and Why"

Carlos Alfonso*

CEO & General Manager, Alliant Partners
"One Path to Community Development"

Dave Materna*

Partner, Stornoway Co. LLC
"Student Housing Investment"

John Ropes*

President, Ropes Associates, Inc.
"Organization and Execution of a Successful Development Plan"

Jim Motta*

President, Starwood Land Company
"Placemaking: Guiding Principles for Planned Communities"

*member UF Real Estate Advisory Board

UF's Real Estate Academic Programs

UF's real estate program includes the Nathan S. Collier Master of Science in Real Estate program and the newly launched undergraduate real estate minor. With the minor, we hope to reach hundreds of students who want to become involved in real estate and allied fields in Florida.

Nathan S. Collier Master of Science in Real Estate (MSRE) Program

The one year, full-time in residence, Nathan S. Collier Master of Science in Real Estate (MSRE) Program thrives on innovation, a dynamic group of roughly 30 students per year, significant interaction with high-level working professionals, and nationally recognized professors. The ability of MSRE graduates to make immediate and significant contributions to the profitability of their firms is evidenced by the fact that numerous employers have come back to hire additional graduates over the years.

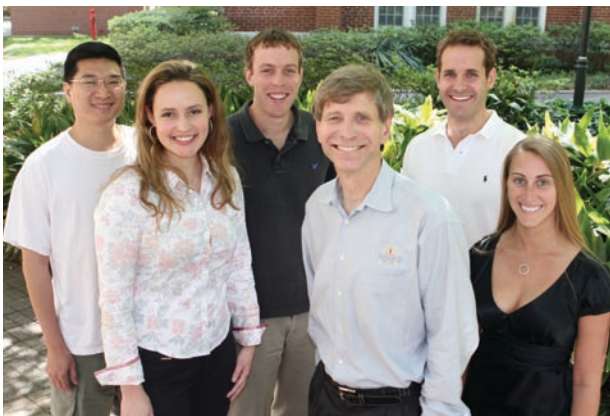
For more information on this program, contact Pam DeMichele, Director of Admissions & Student Services, at (352) 273-0310 or pam.demichele@cba.ufl.edu

MBA with Real Estate Concentration

A Master of Business Administration (MBA) with a real estate concentration has been available at UF for over 60 years. In the 2006-07 academic year, nine MBA students declared a real estate concentration, while many more took graduate real estate courses.

Joint JD/MSRE Program

This year, eight students participated in the three-year program, which intersects the MSRE program with the Levin College of Law.



"Florida is real estate," explains Board member Nathan Collier, shown here with members of the MSRE class of 2007. His endowment is helping propel the MSRE program to top tier status.

Undergraduate Minor in Real Estate

An undergraduate real estate minor was instituted in Fall 2006, with more than 25 students currently declaring a real estate minor. We anticipate the minor will be attractive to a broad spectrum of students, and will provide Florida real estate companies with a talented, motivated pool of interns and future employees. Over 700 undergraduates took real estate courses in 2006-07.

For more information on the minor, click [Undergraduate RE](#) at www.realestate.ufl.edu

Real estate lecturer Mark Monroe, shown here with students Tanya Eberhardt and Galen Sencil, worked with Professor David Ling to spearhead the creation of the undergraduate real estate minor at UF.

Launch of the undergraduate minor in real estate in 2006-07 opened the door to hundreds of students who want to explore real estate as a career option.

Average starting salary
Class of 2006 – \$76,078
Class of 2007 – \$91,875

MSRE and MSRE/JD	Class of 2007	Class of 2008
# Students	27 (including 6 MSRE/JD)	30 (admitted)
Ave. Undergrad GPA	3.45	3.45
Ave. GMAT	602	600
Ave. Work Experience	4 years	3 years
International Students	6 (Brazil, Canada, South Korea, Thailand, Taiwan, United Kingdom)	7 (China, Ecuador, India, Kuwait, South Korea, Thailand)

Capstone Competition

Each year the Master of Science in Real Estate (MSRE) program concludes with a Capstone course involving a challenging, live real estate project related to a site or problem offered by a member of the UF Real Estate Advisory Board. MSRE students work in teams to research and propose a development plan, which they present in the spring term. UF faculty and a panel of industry experts evaluate the presentations and choose a winner.

This year the Capstone subject property was provided by UF Real Estate Advisory Board member Ted McGowan, Clay County Port, Inc., Universal Sales Corporation and Reynolds Real Estate Ventures. Student teams were tasked with devising a development plan for an 1,800-acre site in Jacksonville.



2007 Capstone Competition winners (l to r): Matt Koblegard, Catarina Soares, Chris Henderson (leader), Josh Spount, Liz Kenney, Mallory Minichbauer

UF's Real Estate Faculty

In November 2006, the second edition of Professors Archer and Ling's *Real Estate Principles: A Value Approach* was published, quickly becoming the leading academic principles of real estate textbook.

UF's Real Estate Influence

A *Real Estate Economics 2006* study ranked UF as the 8th most influential university in the world in real estate research during 1999-2004. The same publication named Professor Ling the 7th most influential individual real estate researcher.

Professor David Ling was appointed Dean of the *Weimer School of Advanced Studies in Real Estate and Land Economics* in Fall 2006. Established in 1982, the non-profit Weimer School meets several times per year at its West Palm Beach campus. Acceptance into the Weimer School Fellow program, which provides post-doctoral education for leading academics and industry researchers working in the areas of real estate, housing, and urban economics throughout the world, is highly selective. Professor Ling was selected as a Fellow in 1995 and has been a Weimer School faculty member since 2003. Professor Wayne Archer was selected as a Fellow in 1998.



Best Paper Award for articles published in the Journal of Real Estate Research, 2006-07:

- *Considerations in the Design and Construction of Investment Real Estate Research Indices* (David Ling, with David Geltner, MIT)
- *A Random Walk Down Main Street: Can Experts Predict Returns on Commercial Real Estate?* (David Ling) – also won this award for the 2005-06 academic year



Monroe



Jones



Latimer



McDougall

Mark Monroe, UF Lecturer

Adjunct Faculty

Todd Jones, Deloitte Tax LLP
Real Estate Advisory Board

Stanley Latimer, GeoPlan Center
UF College of Design, Construction
& Planning

Ed McDougall, Key InSights
Real Estate Advisory Board

Scholarships

As competition for high-quality real estate students increases, so does the importance of an active scholarship program. The Advisory Board intends to unveil a major fund-raising initiative in the coming year to more fully develop the scholarship offerings we are able to provide students. While the Warrington College of Business Administration contributes more than \$20,000 annually in scholarship funds, we are grateful to the following individuals for laying a foundation for a more competitive scholarship program.

Scholarship Endowments (permanent commitments)

- Steve Bernstein Real Estate Scholarship Endowment
- Richard W. Cope Real Estate Endowment
- Richard Donnellan Real Estate Scholarship Endowment
- Daniel M. & Cheryl W. DuPree Real Estate Scholarship Endowment
- Florida Realtors' Educational Foundation Endowment
- Dairell J. Snapp Real Estate Research Endowment

Multi-Year Scholarship Pledges (annual commitments)

- Rick Scarola
- Jim Fried
- Ken Mamula
- Hank Sorensen (in honor of his grandfather, Dr. Joseph E. Rhile)



MSRE Class of 2007

Scholarship support gained momentum in 2006-07.

“In my view, an endowment to the University is yet another investment in a well-rounded portfolio. In this case, the return comes not in direct dollars, but in lives changed and careers begun in excellence.”

– Advisory Board member Kelley A. Bergstrom, Bergstrom Investment Management



Advisory Board member Ken and Linda McGurn donated 216 acres of land and a conservation easement on an adjacent parcel, to create an endowment (valued at over \$2 million) that supports a real estate professorship and the Florida Museum of Natural History.

Bergstrom Center Development

Our Development program serves as the central fundraising effort to secure private support for the Bergstrom Center for Real Estate Studies in partnership with the University of Florida Foundation. Charitable gifts provide the “margin of excellence” for our academic programs and research.

How Gifts are Used

All gifts designated for the Bergstrom Center are payable to the University of Florida Foundation and are generally tax-deductible. Your gift may support real estate academic or research programs, faculty initiatives, or student scholarships. Permanent named endowed funds may also be established to ensure long-term stable funding for any project or program.

Ways to Give

There are several ways to support the Bergstrom Center:

- Cash
- Stocks (especially appreciated stocks)
- Real Estate
- Charitable Bequests (wills and trusts)
- Life Income Gifts (charitable remainder trusts, annuities, retained life estates and retirement planning)
- Life Insurance (new or existing policy)

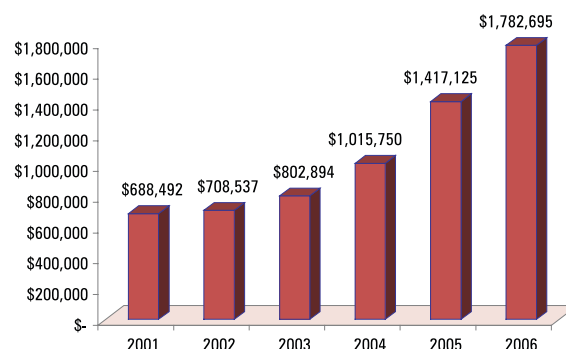
Endowments

Endowments are named permanent funds that provide annual renewable support for specific donor-designated programs. Endowments are managed and invested by the University of Florida Foundation. As of December 31, 2006, there are ten UF/Bergstrom Center endowments valued at more than \$1.7 million established by individual real estate alumni, businesses, associations and friends of UF real estate. A new endowment requires an initial minimum gift of \$30,000.

For more information contact:

Warrington College of Business Administration
Development Office
Jon Cannon, Director of Development
Office: 352.392.0381
Cell: 352.246.5329
jon.cannon@cba.ufl.edu

2006-07 Bergstrom Center Endowment Values



Matching Gift Programs

The state of Florida currently provides generous matching funds for endowed gifts of \$100,000 or more through its Major Gifts Trust Fund according to the following state matching gift levels:

\$100,000 to \$599,999.....	50%
\$600,000 to \$1,000,000.....	70%
\$1,000,001 to \$1,500,000.....	75%
\$1,500,001 to \$2,000,000.....	80%
\$2,000,001 or more.....	100%



**Bergstrom Center
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Warrington College of Business Administration

UNIVERSITY of FLORIDA

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