

# Webinar

## ULI Philadelphia: Exploring DE&I in Central PA Commercial Real Estate

Date: March 24, 2021

00:00:00 --> 00:00:02: Hi everyone, thanks for watching today.

00:00:02 --> 00:00:06: I'm Alan Racek, chair of Uli Philadelphia and principle at

00:00:06 --> 00:00:08: AR spruce in Philadelphia.

00:00:08 --> 00:00:13: Today's program, exploring diversity, equity and inclusion in central Pennsylvania.

00:00:13 --> 00:00:17: Commercial real estate is one in a series of programs

00:00:17 --> 00:00:21: that we've been putting on for over a year on

00:00:21 --> 00:00:23: the subject of DCI in Philadelphia.

00:00:23 --> 00:00:29: In you alive and in the real estate industry.

00:00:29 --> 00:00:30: Here's the agenda for today.

00:00:30 --> 00:00:33: Kevin, if you'll pop that up.

00:00:33 --> 00:00:36: This is what we'll be talking about today.

00:00:36 --> 00:00:38: I want to say a few words before we get

00:00:38 --> 00:00:38: started.

00:00:38 --> 00:00:40: Both about you like Philadelphia,

00:00:40 --> 00:00:43: you lie in general and some of the things that

00:00:43 --> 00:00:44: we've been doing.

00:00:44 --> 00:00:45: But before I do that,

00:00:45 --> 00:00:47: I'd like to thank our sponsors,

00:00:47 --> 00:00:50: in particular the high real Estate Group and read to

00:00:50 --> 00:00:52: who are our program sponsors today.

00:00:52 --> 00:00:57: This program in particular wouldn't have happened without their generous

00:00:57 --> 00:00:57: support.

00:00:57 --> 00:01:01: Also, our ongoing efforts both in this and everything you

00:01:01 --> 00:01:03: will i'd's are supported by urban visionary.

00:01:03 --> 00:01:09: Diamond leadership circle, Platinum Gold next slide silver and friend

00:01:09 --> 00:01:10: levels of sponsorship.

00:01:10 --> 00:01:14: We'd love to see your name on this list.

00:01:14 --> 00:01:19: If you're interested, please let us know in the by  
00:01:19 --> 00:01:21: contacting us at [uli.org](http://uli.org).  
00:01:21 --> 00:01:24: This program today continues our work at you alive in  
00:01:24 --> 00:01:27: our District Council on the subject of diversity,  
00:01:27 --> 00:01:30: equity and inclusion. A member of Rd Advisor Jeremy Sunk,  
00:01:30 --> 00:01:33: it is going to lead us into today's discussion,  
00:01:33 --> 00:01:36: but first I'd like to say a few words about  
00:01:36 --> 00:01:40: both you alive and in particular about this program and  
00:01:40 --> 00:01:41: what it represents for us.  
00:01:41 --> 00:01:43: In case you don't know,  
00:01:43 --> 00:01:45: the Urban Land Institute is an organization,  
00:01:45 --> 00:01:49: an international organization of about 45 thousand members,  
00:01:49 --> 00:01:52: and its mission is to shape the future of the  
00:01:52 --> 00:01:56: built environment for transformative impact in communities  
worldwide.  
00:01:56 --> 00:01:59: We have about 900 members here in the Philadelphia region,  
00:01:59 --> 00:02:02: which includes new Southern, New Jersey,  
00:02:02 --> 00:02:04: Delaware, the Lehigh Valley and of course,  
00:02:04 --> 00:02:09: here in Central Pennsylvania. We have 18 councils and  
committees  
00:02:09 --> 00:02:13: representing a variety of interests and interest groups.  
00:02:13 --> 00:02:16: And we are primarily in education in research organizations,  
00:02:16 --> 00:02:20: so we run a wide variety of programs involving Members  
00:02:20 --> 00:02:24: who volunteer their time and expertise in a variety of  
00:02:24 --> 00:02:27: pricing issues in real estate development and land use.  
00:02:27 --> 00:02:30: In the past year, we've done a bunch of interesting  
00:02:30 --> 00:02:31: things.  
00:02:31 --> 00:02:33: This included technical assistance panels,  
00:02:33 --> 00:02:36: including one in West Whiteland Township,  
00:02:36 --> 00:02:39: where we dealt with smart growth issues in a largely  
00:02:39 --> 00:02:43: automobile oriented community and talk with him about place  
making.  
00:02:43 --> 00:02:47: We also did one for Philadelphia Industrial Development  
Corporation on  
00:02:47 --> 00:02:51: the West banks of the Schuylkill River for near Bartram's  
00:02:51 --> 00:02:54: Garden for a Life Sciences campus project that PDC is  
00:02:54 --> 00:02:57: contemplating there. We had a national study visit too.  
00:02:57 --> 00:03:02: Look at Philadelphia's policies on naturally occurring  
affordable housing.  
00:03:02 --> 00:03:05: All of these will result in reports that will be  
00:03:05 --> 00:03:07: issued by Uli Philadelphia.  
00:03:07 --> 00:03:09: Describing the results of those efforts.  
00:03:09 --> 00:03:12: Also, we have a program that you see here called

00:03:12 --> 00:03:13: Urban Plan,  
00:03:13 --> 00:03:17: which is designed to teach non industry participants about  
the  
00:03:18 --> 00:03:22: process of real estate development and land use policy and  
00:03:22 --> 00:03:24: implementation of land use policy.  
00:03:24 --> 00:03:26: This year we rolled this out last year.  
00:03:26 --> 00:03:30: First time in Philadelphia, although this is a program that's  
00:03:30 --> 00:03:33: been going on for over 20 years with in Philadelphia  
00:03:33 --> 00:03:35: starting in California,  
00:03:35 --> 00:03:39: we've delivered this program to colleges to register  
community organizations  
00:03:39 --> 00:03:40: here in Philadelphia,  
00:03:40 --> 00:03:44: which we did not long ago and community participants.  
00:03:44 --> 00:03:46: We plan to further roll this out to deliver it  
00:03:46 --> 00:03:48: to city and County officials.  
00:03:48 --> 00:03:52: Anta high schools coming up in not too long.  
00:03:52 --> 00:03:56: We also have just recently started a new mentorship program  
00:03:56 --> 00:03:58: which we kicked off with new members,  
00:03:58 --> 00:04:02: which is specifically designed to bolster rdy efforts,  
00:04:02 --> 00:04:05: but also designed to teach people not just how to  
00:04:05 --> 00:04:06: be men teased,  
00:04:06 --> 00:04:10: but also how to be better mentors.  
00:04:10 --> 00:04:12: There is lots more that we're doing.  
00:04:12 --> 00:04:13: This just scratches the surface.  
00:04:13 --> 00:04:15: If you're interested in any of these,  
00:04:15 --> 00:04:18: I'd encourage you to get involved because there's plenty to  
00:04:18 --> 00:04:21: be done here at you like Philadelphia.  
00:04:21 --> 00:04:24: So before we get started on today's program in earnest,  
00:04:24 --> 00:04:27: I just want to provide the chairs overview for why  
00:04:27 --> 00:04:28: we're here when this started.  
00:04:28 --> 00:04:32: Actually, this started long before I became chair in July  
00:04:32 --> 00:04:32: 2019,  
00:04:32 --> 00:04:36: but our efforts have certainly accelerated over the last two  
00:04:36 --> 00:04:36: years.  
00:04:36 --> 00:04:39: This Jeremy is going to describe to you last year  
00:04:39 --> 00:04:43: you will I Philadelphia issued a statement where we  
committed  
00:04:43 --> 00:04:46: to an array of anti racist actions for our organization  
00:04:46 --> 00:04:48: and our industry. Importantly. For example,  
00:04:48 --> 00:04:52: we committed to making change internally in our organization  
by  
00:04:52 --> 00:04:54: creating opportunities for black,  
00:04:54 --> 00:04:57: Indigenous and peace. Full of color to lead in our

00:04:57 --> 00:05:01: organization while also exploring how to leverage our platform to

00:05:01 --> 00:05:03: influence the wider industry.

00:05:03 --> 00:05:06: We're here today because we're also committed to providing a

00:05:06 --> 00:05:09: forum for difficult and sometimes uncomfortable,

00:05:09 --> 00:05:15: conversations, better industries role. In perpetuating the systemic racism that

00:05:15 --> 00:05:17: our communities continue to endure.

00:05:17 --> 00:05:20: As difficult as some of this is to hear,

00:05:20 --> 00:05:21: especially for us white people,

00:05:21 --> 00:05:23: it's important that we hear it.

00:05:23 --> 00:05:26: It's clear to me that before we can roll up

00:05:26 --> 00:05:29: our sleeves and do the hard work of undoing what's

00:05:29 --> 00:05:29: been done,

00:05:29 --> 00:05:32: we have to understand what it is and where it

00:05:32 --> 00:05:32: came from.

00:05:32 --> 00:05:34: As chair of this District Council,

00:05:34 --> 00:05:37: I am committed to pushing this along as fast and

00:05:37 --> 00:05:38: as strongly as possible,

00:05:38 --> 00:05:41: and I've been working with the global and national you

00:05:42 --> 00:05:44: alive organization over the past year on this issue.

00:05:44 --> 00:05:47: As a working group chair of You Allies National DDI

00:05:47 --> 00:05:48: Council.

00:05:48 --> 00:05:50: And I can tell you that this commitment extends all

00:05:50 --> 00:05:53: the way through management and all the way through senior.

00:05:53 --> 00:05:57: You will. I leadership. What we're doing here today is

00:05:57 --> 00:06:00: one way in which in which you will like and

00:06:00 --> 00:06:03: contribute positively to solving the problem.

00:06:03 --> 00:06:06: We share in common as a Premier research and education

00:06:07 --> 00:06:09: organization in the real estate industry.

00:06:09 --> 00:06:12: You will, I can help just by doing what it

00:06:12 --> 00:06:13: does so well,

00:06:13 --> 00:06:16: which is convenience to learn and to discuss so we

00:06:16 --> 00:06:18: can make a difference.

00:06:18 --> 00:06:21: Now it's my pleasure to introduce a member of RDI

00:06:21 --> 00:06:23: Advisors Group Jeremy Sunket,

00:06:23 --> 00:06:26: who's going to provide. More background and to set us

00:06:26 --> 00:06:28: up for today's conversation,

00:06:28 --> 00:06:28: Jeremy.

00:06:31 --> 00:06:34: Thanks Alan and good morning everybody.

00:06:34 --> 00:06:36: Glad to be with you this morning.

00:06:36 --> 00:06:39: What I wanted to do was to provide some context

00:06:39 --> 00:06:41: for the work that we've been doing,  
00:06:41 --> 00:06:45: some of which Alan referenced and hopefully provide some thoughts  
00:06:45 --> 00:06:48: for the conversation that you all are about to have  
00:06:48 --> 00:06:51: and the conversations that we will all be engaged in  
00:06:51 --> 00:06:57: going forward regarding diversity, equity and inclusion in real estate.  
00:06:57 --> 00:06:58: Could move to the next slide.  
00:07:01 --> 00:07:04: So we we thought we would lay this out in  
00:07:04 --> 00:07:06: terms of how it started,  
00:07:06 --> 00:07:10: how it's going and just show the progression of activity  
00:07:10 --> 00:07:13: which you can see you know goes back quite some  
00:07:13 --> 00:07:15: time back to October of 19.  
00:07:15 --> 00:07:20: And again Alan referenced that in terms of establishing diversity  
00:07:20 --> 00:07:23: and equity and inclusion as a priority within you a  
00:07:23 --> 00:07:24: lie,  
00:07:24 --> 00:07:27: and you know a series of activities you know were  
00:07:27 --> 00:07:31: set in motion as a result of the setting of  
00:07:31 --> 00:07:32: that priority.  
00:07:32 --> 00:07:35: An important one was the drafting of a framework for  
00:07:35 --> 00:07:36: action,  
00:07:36 --> 00:07:39: which is referenced here in February of 20,  
00:07:39 --> 00:07:41: which really basically you know,  
00:07:41 --> 00:07:44: set an intention on the part of ULI an of  
00:07:44 --> 00:07:46: the group that has been formed.  
00:07:46 --> 00:07:51: The diversity equity inclusion advisors to work specifically on diversity,  
00:07:51 --> 00:07:56: equity and inclusion issues, and that statement of intention binds  
00:07:56 --> 00:07:57: us to action.  
00:07:57 --> 00:08:01: We were very mindful of creating something that was action  
00:08:01 --> 00:08:02: oriented.  
00:08:02 --> 00:08:05: We recognize that there is a balance when dealing with  
00:08:05 --> 00:08:06: diversity,  
00:08:06 --> 00:08:09: equity and inclusion between necessary conversations,  
00:08:09 --> 00:08:12: and you know, having the right kinds of conversations that  
00:08:12 --> 00:08:14: actually compel action.  
00:08:14 --> 00:08:17: You know there needs to be a lot of discussion  
00:08:17 --> 00:08:18: around this issue.  
00:08:18 --> 00:08:22: Some people are impatient with conversation and tired of talking  
00:08:22 --> 00:08:23: and want to see real action,

00:08:23 --> 00:08:26: and we're trying to find the balance between those two  
00:08:27 --> 00:08:27: things.  
00:08:27 --> 00:08:31: Have the necessary conversations that are going to inform  
and  
00:08:31 --> 00:08:34: compel the right actions related to the ENI within the  
00:08:34 --> 00:08:35: industry.  
00:08:35 --> 00:08:38: So the framework which you know reference again has been  
00:08:38 --> 00:08:39: has been really,  
00:08:39 --> 00:08:43: really instructive and continues to guide our work,  
00:08:43 --> 00:08:46: and I would encourage anybody who hasn't seen it yet  
00:08:46 --> 00:08:47: to access it.  
00:08:47 --> 00:08:50: And you know, just become familiar with the way we  
00:08:50 --> 00:08:51: set up this.  
00:08:51 --> 00:08:54: This diversity, equity inclusion advisory group,  
00:08:54 --> 00:08:57: the group that I that I referenced a which you  
00:08:57 --> 00:09:00: know a proud member of the DNI Advisors we convened  
00:09:00 --> 00:09:01: in June of 2020.  
00:09:01 --> 00:09:02: And as you can see,  
00:09:02 --> 00:09:06: we've set in motion a number of programming activities.  
00:09:06 --> 00:09:11: Two, you know, under the umbrella under the auspices of  
00:09:11 --> 00:09:12: this DE and I.  
00:09:12 --> 00:09:15: Effort and we've had some you know forums,  
00:09:15 --> 00:09:17: some conversations that we planned.  
00:09:17 --> 00:09:20: We kicked off with Herman Bulls,  
00:09:20 --> 00:09:22: who is the vice chair of the JLL Americas,  
00:09:22 --> 00:09:26: who, you know, walked us through a very candid  
conversation  
00:09:26 --> 00:09:27: on diversity,  
00:09:27 --> 00:09:30: equity and inclusion very personal.  
00:09:30 --> 00:09:33: His experience coming up through the industry and shining a  
00:09:34 --> 00:09:37: light on some really important topics that I know,  
00:09:37 --> 00:09:41: have informed our thinking and will inform our actions as  
00:09:41 --> 00:09:43: we continue to pursue this,  
00:09:43 --> 00:09:46: this initiative. Within, you'll like Philadelphia again.  
00:09:46 --> 00:09:49: I would encourage anybody who has not you didn't attend  
00:09:49 --> 00:09:52: the event that we had with Herman that has been  
00:09:52 --> 00:09:52: recorded.  
00:09:52 --> 00:09:55: I would encourage folks to access that as well,  
00:09:55 --> 00:09:58: because there's there's a lot of wisdom in the in  
00:09:58 --> 00:09:59: that conversation,  
00:09:59 --> 00:10:01: and I will put in the next slide.  
00:10:04 --> 00:10:07: So we've also looked at the activity for the DE  
00:10:07 --> 00:10:09: and I Advisory Group in terms of what can we

00:10:09 --> 00:10:10: do within you.

00:10:10 --> 00:10:13: I would you know, within the organization and within the

00:10:13 --> 00:10:17: community that it represents the membership and what kind of

00:10:17 --> 00:10:18: change can we affect?

00:10:18 --> 00:10:21: And do we intend to effect within the industry within

00:10:21 --> 00:10:24: the real estate industry so some of the things within

00:10:24 --> 00:10:25: you lie again,

00:10:25 --> 00:10:27: Alan referenced and some of them are,

00:10:27 --> 00:10:29: you know, maybe lower hanging fruit.

00:10:29 --> 00:10:32: Some of them might be more challenging than you know.

00:10:32 --> 00:10:35: They seem to be, but clearly in terms of membership

00:10:36 --> 00:10:36: in leadership,

00:10:36 --> 00:10:39: we really want to work on representation,

00:10:39 --> 00:10:42: and there's been a lot of intention behind trying to

00:10:42 --> 00:10:45: make sure that we are reflecting the diversity of our

00:10:45 --> 00:10:49: communities in in both utilized membership an in leaderships on

00:10:49 --> 00:10:52: the content side. These forums that I referenced,

00:10:52 --> 00:10:55: the both the discussions that we're having and some of

00:10:55 --> 00:10:59: the related program are going to be undertaken with the

00:10:59 --> 00:11:02: eye in mind specifically so that we can make sure

00:11:02 --> 00:11:05: we're continuing to put that content out there in a

00:11:05 --> 00:11:06: variety of ways.

00:11:06 --> 00:11:10: Diversity equity inclusion is a very nuanced topic.

00:11:10 --> 00:11:13: It touches a lot of areas within within real estate

00:11:13 --> 00:11:16: and we want to make sure we're representing that in

00:11:16 --> 00:11:19: the content that you Ally puts out and you know

00:11:19 --> 00:11:23: in terms of partnerships. I would highlight that that's something

00:11:23 --> 00:11:26: we continue to think about ways in which you know

00:11:26 --> 00:11:30: we can engage as an organization with peer organizations within

00:11:30 --> 00:11:33: the real estate industry, other industry associations,

00:11:33 --> 00:11:36: even organizations that are not specifically real,

00:11:36 --> 00:11:38: estate focused. You know, we,

00:11:38 --> 00:11:42: we've reached out to Chambers of Commerce about potential collaborations

00:11:42 --> 00:11:42: there.

00:11:42 --> 00:11:45: We obviously are focused on the real estate industry because

00:11:45 --> 00:11:46: that is,

00:11:46 --> 00:11:47: you know, you allies focus,

00:11:47 --> 00:11:51: but this is ultimately about affecting change in society.  
00:11:51 --> 00:11:53: And you know, if we can do that through some  
00:11:53 --> 00:11:54: creator,  
00:11:54 --> 00:11:57: you know. Creative partnerships, we think we can have,  
00:11:57 --> 00:11:59: you know, a broader impact and are more likely to  
00:11:59 --> 00:12:02: affect change within within real estate.  
00:12:02 --> 00:12:04: And in terms of activity within the industry,  
00:12:04 --> 00:12:07: there has been a lot of conversation and a lot  
00:12:07 --> 00:12:11: of momentum surrounding the promotion of equitable  
development.  
00:12:11 --> 00:12:15: Complex topic, very important when you consider a lot of  
00:12:15 --> 00:12:17: the historical factors at play,  
00:12:17 --> 00:12:21: particularly in communities of color and in urban areas where  
00:12:21 --> 00:12:25: we're development takes place on a significant scale and you  
00:12:25 --> 00:12:29: know very important conversations that we have been  
focused on  
00:12:29 --> 00:12:33: having. You know, both in a forum context and the  
00:12:33 --> 00:12:36: things that we continue to talk about within the DNI  
00:12:37 --> 00:12:37: advisors.  
00:12:37 --> 00:12:39: I won't run through this entire list,  
00:12:39 --> 00:12:43: but I would also just highlight the youth engagement and  
00:12:43 --> 00:12:46: exposure component to it because we we look at this  
00:12:46 --> 00:12:50: diversity and equity inclusion within the industry in terms of  
00:12:50 --> 00:12:52: the current state of the industry.  
00:12:52 --> 00:12:55: How do we change the conditions as they exist as  
00:12:55 --> 00:12:56: they exist now in terms of,  
00:12:56 --> 00:13:01: you know, bringing about greater representation and maybe  
bringing people  
00:13:01 --> 00:13:04: into conversations who are in the industry who are not  
00:13:04 --> 00:13:06: part of those conversations.  
00:13:06 --> 00:13:07: But there's also, you know.  
00:13:07 --> 00:13:10: Looking at the pipeline and saying how do we engage  
00:13:10 --> 00:13:13: young people in underrepresented groups?  
00:13:13 --> 00:13:14: Whether that's based on race,  
00:13:14 --> 00:13:17: ethnicity, or gender, and how do we get them exposed  
00:13:18 --> 00:13:21: to the real estate industry at an earlier stage of  
00:13:21 --> 00:13:21: life?  
00:13:21 --> 00:13:23: And that's another way to work on changing,  
00:13:23 --> 00:13:27: you know, diversity, equity and inclusion within the industry.  
00:13:27 --> 00:13:29: So let's deal with the current state.  
00:13:29 --> 00:13:32: But let's let's also look to the future and trying  
00:13:32 --> 00:13:34: to find ways to engage youth.  
00:13:34 --> 00:13:36: Expose them to real estate,



00:13:36 --> 00:13:39: understand what it means. To be in this profession in  
00:13:39 --> 00:13:41: the many areas in which you can work.  
00:13:41 --> 00:13:44: And that's something that kind of a great impact on.  
00:13:44 --> 00:13:47: You know, changing the you know the representation within  
the  
00:13:47 --> 00:13:48: industry,  
00:13:48 --> 00:13:50: and I'll move to the next slide.  
00:13:53 --> 00:13:55: And you know finally, this is where I'll close.  
00:13:55 --> 00:13:59: Disciplined intention has become something of a mantra  
within the  
00:13:59 --> 00:14:02: DNI advisors at you a lot you will like Philadelphia,  
00:14:02 --> 00:14:04: and what we really mean by that is,  
00:14:04 --> 00:14:08: as I mentioned, the framework for action really sets in  
00:14:08 --> 00:14:08: intention.  
00:14:08 --> 00:14:11: That's a really important thing to do when you're taking  
00:14:12 --> 00:14:14: on a very complex an what can sometimes seem like  
00:14:14 --> 00:14:17: a daunting issues such as diversity,  
00:14:17 --> 00:14:19: equity, inclusion, because it seems so big.  
00:14:19 --> 00:14:21: The issue seems so entrenched,  
00:14:21 --> 00:14:24: and sometimes you might not know where to begin or  
00:14:24 --> 00:14:24: or.  
00:14:24 --> 00:14:27: So we can kind of talk ourselves out of things  
00:14:27 --> 00:14:29: before we even set about doing them.  
00:14:29 --> 00:14:32: We set an intention through the framework,  
00:14:32 --> 00:14:35: but without the discipline to accompany that intention,  
00:14:35 --> 00:14:38: we are not likely to have the kind of impact  
00:14:38 --> 00:14:40: that certainly we aspired to have.  
00:14:40 --> 00:14:43: So discipline intention in a lot of the things I  
00:14:43 --> 00:14:43: mentioned,  
00:14:43 --> 00:14:47: whether it's just asking ourselves the right questions with  
programming  
00:14:48 --> 00:14:48: and content,  
00:14:48 --> 00:14:50: and in our, you know,  
00:14:50 --> 00:14:52: in our professional lives, and you know,  
00:14:52 --> 00:14:55: in our jobs are we exhibiting a discipline intention with  
00:14:55 --> 00:14:56: respect to.  
00:14:56 --> 00:15:00: Hiring decisions you know, reaching out to people who look  
00:15:00 --> 00:15:03: different than us within our workplaces.  
00:15:03 --> 00:15:07: Engaging and mentoring activities. All of those things require  
yes,  
00:15:07 --> 00:15:10: setting an intention and, but there needs to be a  
00:15:10 --> 00:15:12: discipline to accompany it.  
00:15:12 --> 00:15:14: If we're going to actually create,

00:15:14 --> 00:15:17: change, and sustain that change.

00:15:17 --> 00:15:20: So that's something we revisit often as we move through,

00:15:20 --> 00:15:23: you know, the work of the DNI Group and UI

00:15:23 --> 00:15:26: Philadelphia an just a few points to close as it

00:15:26 --> 00:15:27: relates to.

00:15:27 --> 00:15:30: What we're trying to do under the framework we you

00:15:30 --> 00:15:33: know part of the intention we set was to have

00:15:33 --> 00:15:34: an ongoing conversation,

00:15:34 --> 00:15:36: not a one on, not a one,

00:15:36 --> 00:15:38: and done this this. This topic is,

00:15:38 --> 00:15:41: you know, wide ranging and we need to attack it

00:15:41 --> 00:15:43: from many different angles,

00:15:43 --> 00:15:44: so we need to have ongoing,

00:15:44 --> 00:15:48: sustained handed convert conversations about diversity,

00:15:48 --> 00:15:51: equity and inclusion. And again we don't just want to

00:15:51 --> 00:15:51: talk,

00:15:51 --> 00:15:54: we want to act. So we want to walk the

00:15:54 --> 00:15:58: talk and create a dialogue that actually influences action both

00:15:58 --> 00:16:00: within and hopefully with outside.

00:16:00 --> 00:16:02: You know, outside of the industry as well.

00:16:02 --> 00:16:04: We also want to observe what's wrong,

00:16:04 --> 00:16:07: you know. In the industry where we are lacking and

00:16:08 --> 00:16:11: maybe falling short in diversity and where there are maybe

00:16:11 --> 00:16:14: some institutional barriers or cultural fixtures.

00:16:14 --> 00:16:17: But we don't want to only focus on what's wrong.

00:16:17 --> 00:16:20: We want to lift up what's right and we always

00:16:20 --> 00:16:23: want to come back to what we can do to

00:16:23 --> 00:16:25: change the conditions as we observe them.

00:16:25 --> 00:16:28: And Lastly, I'll say we want to do all of

00:16:28 --> 00:16:30: those things using history as a context.

00:16:30 --> 00:16:33: There is a very rich historical context too.

00:16:33 --> 00:16:36: All of these conversations about diversity,

00:16:36 --> 00:16:39: equity, inclusion and we want to be mindful of that

00:16:39 --> 00:16:42: history as we look to educate as we look to

00:16:42 --> 00:16:42: connect.

00:16:42 --> 00:16:45: And as we look to create change within the industry

00:16:45 --> 00:16:46: so you know,

00:16:46 --> 00:16:49: that's our blueprint for how we are working and how

00:16:49 --> 00:16:51: we intend to move forward,

00:16:51 --> 00:16:53: and I hope that's helpful to you and your work

00:16:53 --> 00:16:57: and in the conversation that you'll be having today and

00:16:57 --> 00:17:00: I will turn it over for the speaker introductions.

00:17:00 --> 00:17:05: Thank you, Jeremy. We're excited to really start walking the  
00:17:05 --> 00:17:09: talk here today and I am and Eater Gallagher.  
00:17:09 --> 00:17:12: I've been a member of Urban Land Institute.  
00:17:12 --> 00:17:16: I believe for more than 10 years and an active  
00:17:16 --> 00:17:19: participant in the ULI Central PA Conference.  
00:17:19 --> 00:17:23: I'd also like to have a big thank you to  
00:17:23 --> 00:17:26: Retu Anhai Industries.  
00:17:26 --> 00:17:28: For your.  
00:17:28 --> 00:17:33: For your support of this really endeavour today in the  
00:17:33 --> 00:17:38: initiative that our Council is taking to start this conversation,  
00:17:38 --> 00:17:43: we have three very esteemed guests with us all in  
00:17:43 --> 00:17:44: important.  
00:17:44 --> 00:17:49: Industries that that combined are really lead us down the  
00:17:49 --> 00:17:49: land,  
00:17:49 --> 00:17:53: use conversation and each of them are stakeholders.  
00:17:53 --> 00:17:57: Actually all of us. I own a PR and marketing  
00:17:57 --> 00:18:00: firm with offices in Nashville,  
00:18:00 --> 00:18:04: TN and Harrisburg, PA. So I first joined Urban Institute  
00:18:04 --> 00:18:09: because of the really the knowledge and the resources and  
00:18:09 --> 00:18:10: the research.  
00:18:10 --> 00:18:15: So to that end and little to revisit something Jeremy  
00:18:15 --> 00:18:17: said in the framework for action.  
00:18:17 --> 00:18:21: One of our goals in that is we will leverage  
00:18:21 --> 00:18:25: our platform in convening function to bring education,  
00:18:25 --> 00:18:29: influence and networks to the industry as a whole.  
00:18:29 --> 00:18:33: And we will ensure our content serves the needs of  
00:18:33 --> 00:18:34: minority communities.  
00:18:34 --> 00:18:39: So I can't think of three more appropriate panelist today  
00:18:39 --> 00:18:43: to walk us into those conversations to share a little  
00:18:43 --> 00:18:46: bit about how their industries are.  
00:18:46 --> 00:18:53: Recruiting with intention an opening their conversations to  
00:18:53 --> 00:18:58: more people,  
00:18:58 --> 00:18:59: minorities, people of color. So we're going to start with  
00:18:59 --> 00:19:03: Boney Dawood,  
00:19:03 --> 00:19:05: president of Dawood engineering, Boney as engineer,  
00:19:05 --> 00:19:08: and in the development field.  
00:19:08 --> 00:19:09: I've had the honor of knowing him for more than  
00:19:09 --> 00:19:13: two decades.  
00:19:13 --> 00:19:16: Deep respect Boney. So would you please introduce your  
00:19:16 --> 00:19:20: slides  
and we're going to hear a little bit of the  
background and BIOS from each panelist and then we will

00:19:20 --> 00:19:23: go into a moderated question and answer time.  
00:19:23 --> 00:19:25: So thank you.  
00:19:25 --> 00:19:28: Thank you and thanks for the nice introduction.  
00:19:28 --> 00:19:32: Also want to thank you alive for having this important  
00:19:32 --> 00:19:36: discussion and really inviting us to inviting me to be  
00:19:36 --> 00:19:37: on the panel.  
00:19:37 --> 00:19:41: Just a quick summary of Dawood and who we are  
00:19:41 --> 00:19:45: and I'll give you the short abbreviated version.  
00:19:45 --> 00:19:48: You know my background and also real estate and being  
00:19:48 --> 00:19:51: filled you'll I really started in Virginia was working as  
00:19:51 --> 00:19:55: an engineer in the development industry in North Virginia and  
00:19:55 --> 00:19:59: relearn my development background. In North Virginia,  
00:19:59 --> 00:20:04: Washington DC Metropolitan Baltimore Area came back  
home to Harris  
00:20:04 --> 00:20:07: Burg and started out engineering 29 years ago,  
00:20:07 --> 00:20:09: which is really the core company.  
00:20:09 --> 00:20:14: The core company, and again representing real estate clients  
probably  
00:20:14 --> 00:20:17: forward 30 plus years and worked on a number of  
00:20:17 --> 00:20:19: projects throughout the region.  
00:20:19 --> 00:20:24: Doubt engineering, again is the base company that really  
everything  
00:20:24 --> 00:20:25: emulates from.  
00:20:25 --> 00:20:28: But as time has progressed that we have expanded the  
00:20:28 --> 00:20:29: organization.  
00:20:29 --> 00:20:33: Love you. Good Hope Ventures was created,  
00:20:33 --> 00:20:35: go to ventures. Is a company that we own that  
00:20:35 --> 00:20:37: is the holding company of law.  
00:20:37 --> 00:20:41: The real estate assets and also the development company.  
00:20:41 --> 00:20:45: So good adventures really is primarily in the residential,  
00:20:45 --> 00:20:49: multifamily space and also the office space throughout the  
central  
00:20:49 --> 00:20:49: PA.  
00:20:49 --> 00:20:52: And we enjoy that and also it gives us a  
00:20:52 --> 00:20:56: certain amount of perspective in working with our  
development plans  
00:20:56 --> 00:21:00: and engineering side in terms of the knowledge base.  
00:21:00 --> 00:21:03: So the company has continued to expand and develop and  
00:21:03 --> 00:21:06: really enjoy working with the real estate community.  
00:21:06 --> 00:21:09: Doubt construction is the new venture that we started two  
00:21:09 --> 00:21:11: years ago and that also.  
00:21:11 --> 00:21:14: Sort of complements our residential part of the business,  
00:21:14 --> 00:21:17: and we actually build some of the multi families both

00:21:17 --> 00:21:19: of our own assets and it just we just stay

00:21:19 --> 00:21:22: ingrained and again with my background experience we enjoy that

00:21:22 --> 00:21:25: that industry and really excited and really have a lot.

00:21:25 --> 00:21:29: Appreciate for you. A lion and the resources that you

00:21:29 --> 00:21:30: provide to that industry.

00:21:30 --> 00:21:32: If you could move to the next slide,

00:21:32 --> 00:21:33: please.

00:21:33 --> 00:21:37: Just they give you a sample water projects that we

00:21:37 --> 00:21:40: developed that you'll see a picture of a office park

00:21:40 --> 00:21:41: that we've.

00:21:41 --> 00:21:45: Developed over the years, but the most recent building was

00:21:45 --> 00:21:48: a medical office building in front that we provide and

00:21:48 --> 00:21:49: delivered to you,

00:21:49 --> 00:21:53: PMC, and the. Challenge here was building this through the

00:21:53 --> 00:21:56: pandemic and going ahead of schedule and delivering it to

00:21:56 --> 00:21:59: U PMC during that time period and the challenges you

00:21:59 --> 00:22:03: run to the entitlements during the kovid environment and but

00:22:03 --> 00:22:05: it gives you an example of the Dowd company in

00:22:05 --> 00:22:06: terms of what we do.

00:22:06 --> 00:22:09: We like to look at things at an owners perspective,

00:22:09 --> 00:22:12: and that's sort of our history.

00:22:12 --> 00:22:14: Next slide, please.

00:22:14 --> 00:22:17: The diversity and inclusion, and I think you know,

00:22:17 --> 00:22:22: we we have an interesting perspective on diversity and inclusion

00:22:22 --> 00:22:22: as a.

00:22:22 --> 00:22:26: Diverse owned business, you know we started the business and

00:22:26 --> 00:22:30: there's opportunities and and you have to be quite Frank's

00:22:30 --> 00:22:30: MBE firm.

00:22:30 --> 00:22:31: It is a door opener.

00:22:31 --> 00:22:34: If you look at it that way and and we

00:22:34 --> 00:22:37: really never looked at ourselves as a minority owner info

00:22:37 --> 00:22:40: we need an advantage but it was something that we

00:22:40 --> 00:22:42: focused a lot on. We're nbe.

00:22:42 --> 00:22:46: Furman grew the business, but as time is developed my

00:22:46 --> 00:22:46: view,

00:22:46 --> 00:22:50: personal view and the companies view diversity has evolved and

00:22:50 --> 00:22:53: I met a lot of strong diversity professionals.

00:22:53 --> 00:22:57: But 11-12 years ago, that really helped me better understand

00:22:58 --> 00:22:58: personally.

00:22:58 --> 00:23:02: The impact of diversity inclusion.

00:23:02 --> 00:23:05: To the community. To the company's impact that you have

00:23:05 --> 00:23:09: personally on organization and how you can really be a

00:23:09 --> 00:23:13: advocate to help and be do everything within your power

00:23:13 --> 00:23:16: to to help so that as an owner it's something

00:23:16 --> 00:23:18: that we take very seriously internally.

00:23:18 --> 00:23:21: So our company really looks at diversity,

00:23:21 --> 00:23:24: inclusion as one of our primary core values.

00:23:24 --> 00:23:27: When you look at companies that we talk about quality,

00:23:27 --> 00:23:31: you talk about safety and diversity and inclusion should be

00:23:31 --> 00:23:33: one of those key core.

00:23:33 --> 00:23:36: Talk realmente of an organization and so we have done

00:23:36 --> 00:23:37: that.

00:23:37 --> 00:23:41: We've created Diversity Inclusion Committee within the

00:23:41 --> 00:23:43: company that really

00:23:43 --> 00:23:46: looks at that very closely.

00:23:46 --> 00:23:50: But as we have developed and being a try to

00:23:50 --> 00:23:51: being a company that has a understanding and really work

00:23:51 --> 00:23:54: during the weekend,

00:23:54 --> 00:23:57: we are currently involved with PennDOT.

00:23:57 --> 00:24:01: I'm developing a MBE mentor Purge a program and then

00:24:01 --> 00:24:04: because of our experience in history you know they they

00:24:04 --> 00:24:06: reached out to us and and we're trying to help

00:24:06 --> 00:24:11: to create a program to get more diversity.

00:24:11 --> 00:24:12: When you look at the disparity studies and the lack

00:24:12 --> 00:24:16: of.

00:24:16 --> 00:24:17: Minority owned firms that are involved in the transportation

00:24:17 --> 00:24:20: industry

00:24:20 --> 00:24:23: is pretty significant,

00:24:23 --> 00:24:27: so everything we can do to help in that space

00:24:27 --> 00:24:28: is really,

00:24:28 --> 00:24:31: you know, we were trying to provide our part.

00:24:31 --> 00:24:34: The Council communications that we have with the diversity

00:24:34 --> 00:24:38: and

00:24:38 --> 00:24:42: Inclusion Committee.

00:24:42 --> 00:24:44: We sit on the Board of the Eastern Minority Supplier

00:24:44 --> 00:24:47: Development Council and really made a lot of great,

00:24:47 --> 00:24:50: diverse companies an you know really the future comes into

00:24:50 --> 00:24:50: our strategic alliances with diverse companies to provide

00:24:50 --> 00:24:50: more value.

00:24:50 --> 00:24:50: Two communities and really extend,

00:24:50 --> 00:24:50: so we also as organization in our diversity spend will

00:24:50 --> 00:24:50: look for other diversity partner firms and expand as an

00:24:50 --> 00:24:51: organization.

00:24:51 --> 00:24:54: We also look at how diverse is our company.

00:24:54 --> 00:24:57: So we look at our typical recruiting where we recruited.

00:24:57 --> 00:24:58: Where else can we recruit?

00:24:58 --> 00:25:02: Should we go to historically Black Community University to look

00:25:02 --> 00:25:05: for engineering students and technical students?

00:25:05 --> 00:25:08: So our history has been very interested but it keeps

00:25:08 --> 00:25:12: evolving and again we really appreciate the opportunity to have

00:25:12 --> 00:25:14: a discussion and provide any value we can.

00:25:14 --> 00:25:17: In terms of trying to move the needle.

00:25:17 --> 00:25:19: Thank you.

00:25:19 --> 00:25:23: Thank you Bonnie and we look forward to hearing in

00:25:23 --> 00:25:28: our moderated questions a little bit more about that Mentor

00:25:28 --> 00:25:28: Protege.

00:25:28 --> 00:25:31: I think that's fascinating, and next,

00:25:31 --> 00:25:36: Patti Husic is President and CEO of Centric Financial Corp,

00:25:36 --> 00:25:39: an centric bank. She is no stranger to being only

00:25:40 --> 00:25:42: a handful of women in a room or in an

00:25:43 --> 00:25:45: industry or at a conference,

00:25:45 --> 00:25:48: and we're very honored to have her share.

00:25:48 --> 00:25:51: Excuse me insights as well today.

00:25:51 --> 00:25:55: On her journey and the bank's journey into diversity,

00:25:55 --> 00:26:00: equity and inclusion, whether that is in hiring practices.

00:26:00 --> 00:26:04: And also in lending and working within the Federal banking

00:26:04 --> 00:26:05: regulations.

00:26:05 --> 00:26:09: Patty welcome thank you Ann and thank you to you

00:26:09 --> 00:26:14: alive for having this important conversation today and I think

00:26:14 --> 00:26:18: and I'm looking forward to you know sharing or aspect

00:26:18 --> 00:26:23: at centric Bank. My perspectives and contributing to this.

00:26:23 --> 00:26:28: Again this important conversation today so a little bit about

00:26:28 --> 00:26:30: myself and centric bank.

00:26:30 --> 00:26:31: So I am a proud.

00:26:31 --> 00:26:36: 30 Plus year veteran in the community banking industry.

00:26:36 --> 00:26:40: The first half of my career was in the financial

00:26:40 --> 00:26:45: in in the financial areas where I can most effectively

00:26:45 --> 00:26:46: impact the PN piano.

00:26:46 --> 00:26:50: You know, for various financial institutions.

00:26:50 --> 00:26:56: In 2007 I founded with three other individuals centric bank,

00:26:56 --> 00:26:58: which is a quasi Dinovo bag.

00:26:58 --> 00:27:01: Not quite a full Dinovo from scratch,

00:27:01 --> 00:27:04: but we acquired. A smaller,

00:27:04 --> 00:27:09: troubled institution in the market area and from there is  
00:27:09 --> 00:27:13: about a \$60 million institution had an opportunity to turn  
00:27:13 --> 00:27:14: it around,  
00:27:14 --> 00:27:18: build a strong foundation, and grow to where we're at  
00:27:19 --> 00:27:19: today,  
00:27:19 --> 00:27:23: about 1.3 billion in assets grown by organic growth.  
00:27:23 --> 00:27:29: We have seven financial centers and totaling in central  
Pennsylvania  
00:27:29 --> 00:27:32: and the suburban Philadelphia region.  
00:27:32 --> 00:27:36: We made our movement into the Philadelphia region.  
00:27:36 --> 00:27:39: Over the past four to five years,  
00:27:39 --> 00:27:43: and that's become a big portion of who we are.  
00:27:43 --> 00:27:47: And about 40 plus percentage of our lending portfolio.  
00:27:47 --> 00:27:51: One aspect of centric that is a bit different when  
00:27:51 --> 00:27:54: you look at most banks in general.  
00:27:54 --> 00:27:58: As you look at our C-Suite team and our leadership  
00:27:58 --> 00:27:59: centric is 60%  
00:27:59 --> 00:28:03: female leadership in our various C suites.  
00:28:03 --> 00:28:07: The course myself with the CEO or CFO Chief Risk  
00:28:07 --> 00:28:07: Officer.  
00:28:07 --> 00:28:10: Our Chief Human resource Officer,  
00:28:10 --> 00:28:13: as well as our Chief Retail Officer and a key  
00:28:13 --> 00:28:17: piece of that has been looking out and ensuring that  
00:28:17 --> 00:28:19: whereas we are recruiting,  
00:28:19 --> 00:28:22: of course we want to hire the best of the  
00:28:22 --> 00:28:23: best.  
00:28:23 --> 00:28:27: We want the best talent to join our organization and  
00:28:27 --> 00:28:31: helping us growing make your organization most successful,  
00:28:31 --> 00:28:34: but one of the things that I have done an  
00:28:34 --> 00:28:38: asked all of our individuals as they're looking to.  
00:28:38 --> 00:28:41: Recruit is to bring a diverse set of candidates,  
00:28:41 --> 00:28:43: and I think that's essential.  
00:28:43 --> 00:28:47: If we're always bringing the same candidates that perhaps,  
00:28:47 --> 00:28:51: you know, look like us or those we've worked with  
00:28:51 --> 00:28:55: Ann and the banking industry has been predominantly,  
00:28:55 --> 00:28:58: you know, over the years has been focused with,  
00:28:58 --> 00:29:02: you know, male domination at the upper echelon in the  
00:29:02 --> 00:29:03: C-Suite we've seen some,  
00:29:03 --> 00:29:07: you know, some change you know in regards to the  
00:29:07 --> 00:29:10: C-Suite and as well as on the boards.  
00:29:10 --> 00:29:13: Financial institutions, but for example,  
00:29:13 --> 00:29:17: in you know Pennsylvania, which is no different than other



00:29:17 --> 00:29:18: states within the US,  
00:29:18 --> 00:29:22: with about 5% of females that lead financial institution and  
00:29:22 --> 00:29:24: that does start with intentionality.  
00:29:24 --> 00:29:28: And starting with the tone from the top.  
00:29:28 --> 00:29:32: As I mentioned, we've grown to about 1.3 billion in  
00:29:32 --> 00:29:32: assets,  
00:29:32 --> 00:29:36: and commercial lending is the core of what we do  
00:29:36 --> 00:29:41: at centric and from there that's lending to operating  
00:29:41 --> 00:29:46: companies,  
00:29:41 --> 00:29:46: small businesses owner occupied in non owner occupied  
00:29:41 --> 00:29:46: commercial real  
00:29:47 --> 00:29:51: estate as well as multi family and very proud about  
00:29:51 --> 00:29:53: our culture or centric way.  
00:29:53 --> 00:29:57: And from that we are a three times American bankers,  
00:29:57 --> 00:29:59: best banks to work for.  
00:29:59 --> 00:30:02: And that's out of banks throughout the US.  
00:30:02 --> 00:30:04: Or culture is the core of you know,  
00:30:04 --> 00:30:07: really what drives our business.  
00:30:07 --> 00:30:10: It drives the success and the trajectory,  
00:30:10 --> 00:30:13: and at the core that is our people.  
00:30:13 --> 00:30:15: If we move to the next slide,  
00:30:15 --> 00:30:15: please.  
00:30:18 --> 00:30:22: The power of mentorship and I know we'll talk about  
00:30:22 --> 00:30:24: it a little bit more.  
00:30:24 --> 00:30:27: In our conversation. A little bit later,  
00:30:27 --> 00:30:29: you know, in the panel today,  
00:30:29 --> 00:30:33: but that intentionality you know goes and drives to mentors,  
00:30:33 --> 00:30:35: and you know, I look at,  
00:30:35 --> 00:30:38: you know, for how important it was for me.  
00:30:38 --> 00:30:41: And you know the mentorship of having a mentor who  
00:30:42 --> 00:30:43: gave some great advice.  
00:30:43 --> 00:30:45: And to be that sponsor for you,  
00:30:45 --> 00:30:48: it really can help open the doors.  
00:30:48 --> 00:30:51: It can help make some connections.  
00:30:51 --> 00:30:54: And it can be pivotal in your careers.  
00:30:54 --> 00:30:57: Ann Ann. I know that an aspect for me was  
00:30:57 --> 00:31:00: very pivotal and how a mentor changed my career.  
00:31:00 --> 00:31:04: That that happened when I had worked with the Community  
00:31:04 --> 00:31:07: bank in the area and at the point in time  
00:31:07 --> 00:31:11: they were seeking out the President and CEO role when  
00:31:11 --> 00:31:12: I was the CFO and CEO.  
00:31:12 --> 00:31:16: Oh, and that particular mentor had asked why I was

00:31:16 --> 00:31:18: not going to be considered for it,  
00:31:18 --> 00:31:22: and from that lens and perspective I didn't see past  
00:31:22 --> 00:31:23: that.  
00:31:23 --> 00:31:24: And I saw that was,  
00:31:24 --> 00:31:27: you know, the area where I had focused on in  
00:31:27 --> 00:31:29: my career didn't have experience,  
00:31:29 --> 00:31:32: and where that mentor shared with me said,  
00:31:32 --> 00:31:37: well, you're doing the position you're doing in all aspects  
00:31:37 --> 00:31:38: of those duties,  
00:31:38 --> 00:31:42: responsibilities, why wouldn't you ask to be considered?  
00:31:42 --> 00:31:45: And that was a pivotal moment for me in my  
00:31:45 --> 00:31:49: career and and was priceless advice when I had preceded  
00:31:49 --> 00:31:52: to do such that the response back to me by  
00:31:52 --> 00:31:54: those individuals at that bank.  
00:31:54 --> 00:31:58: Was were thrilled to hear that you're interested because we  
00:31:58 --> 00:32:01: thought with other demands that you had,  
00:32:01 --> 00:32:03: you know, at home with raising a child,  
00:32:03 --> 00:32:07: being a single mother, that that wasn't something that you  
00:32:07 --> 00:32:09: would be able to fit,  
00:32:09 --> 00:32:12: and accommodating your schedule. So for me that advice  
was  
00:32:12 --> 00:32:14: was truly priceless.  
00:32:14 --> 00:32:17: Ann, I think working with others where in within our  
00:32:17 --> 00:32:21: organization at centric we have informal mentor programs.  
00:32:21 --> 00:32:25: Part of the women in banking program that I created  
00:32:25 --> 00:32:26: at the Pennsylvania.  
00:32:26 --> 00:32:31: Bankers Association we have formed both formal mentor and  
mentee's  
00:32:31 --> 00:32:36: and having them involved in helping those young female  
professionals  
00:32:36 --> 00:32:37: you know,  
00:32:37 --> 00:32:41: as they pursue their career in banking and their goals  
00:32:41 --> 00:32:43: to perhaps maybe one day you know.  
00:32:43 --> 00:32:47: Getting to the C-Suite, so have been very impactful with  
00:32:47 --> 00:32:49: that Pennsylvania bankers.  
00:32:49 --> 00:32:52: The women in banking program,  
00:32:52 --> 00:32:55: which today over the past six and a half years,  
00:32:55 --> 00:32:59: has grown to one of their strongest programs.  
00:32:59 --> 00:33:03: Ah, and involving all levels of female professionals in the  
00:33:03 --> 00:33:04: banking industry.  
00:33:04 --> 00:33:08: Another key aspect of which I have done within our  
00:33:08 --> 00:33:13: organization is preparing women for the next stage and their  
00:33:13 --> 00:33:17: next stage of helping them elevate and their position.

00:33:17 --> 00:33:20: You know, as the bank grows in size complexity,  
 00:33:20 --> 00:33:24: being ready for additional board presentations,  
 00:33:24 --> 00:33:28: investor meetings, meeting with institutional investors,  
 00:33:28 --> 00:33:32: and getting ready. As we became a public company as  
 00:33:33 --> 00:33:37: well as looking forward to being on NASDAQ SEC filing  
 00:33:37 --> 00:33:39: and on the Russell 2000,  
 00:33:39 --> 00:33:43: and if we can move to the last slide please.  
 00:33:46 --> 00:33:49: A key part of reaching out with the with DNI  
 00:33:49 --> 00:33:54: and those minority communities isn't starts with intentionality.  
 00:33:54 --> 00:33:57: Anan the discipline I know,  
 00:33:57 --> 00:34:00: as we earlier talked about in the beginning part of  
 00:34:00 --> 00:34:04: this presentation and without the intentionality,  
 00:34:04 --> 00:34:07: we're going to have the same results.  
 00:34:07 --> 00:34:11: Some of the items that we have done was reaching  
 00:34:11 --> 00:34:12: out into,  
 00:34:12 --> 00:34:16: you know, women own with women owned businesses with  
 various  
 00:34:16 --> 00:34:17: groups.  
 00:34:17 --> 00:34:20: Reaching out, we have a women centric program on a  
 00:34:21 --> 00:34:22: quarterly basis.  
 00:34:22 --> 00:34:25: Of those we do business with as well as other  
 00:34:25 --> 00:34:29: businesses in our market areas to provide value to them.  
 00:34:29 --> 00:34:32: And regarding as their owners of companies,  
 00:34:32 --> 00:34:37: we've also reached out to various Chambers of Commerce in  
 00:34:37 --> 00:34:38: our market area.  
 00:34:38 --> 00:34:43: The African American Hispanic Chambers an reaching out  
 with intentionality,  
 00:34:43 --> 00:34:48: talking about the opportunities the lending programs.  
 00:34:48 --> 00:34:51: And depending upon is it that lending program to start  
 00:34:51 --> 00:34:53: up your new business?  
 00:34:53 --> 00:34:56: Is it acquiring commercial real estate or even those who  
 00:34:56 --> 00:35:00: are doing development in projects and helping those you  
 know  
 00:35:00 --> 00:35:03: who are going to be tenants in their buildings?  
 00:35:03 --> 00:35:07: You know, helping them with their build out an opportunities  
 00:35:07 --> 00:35:10: to gain access to capital and that's truly key as  
 00:35:10 --> 00:35:15: a financial institution to looking through that lens and  
 providing  
 00:35:15 --> 00:35:18: access to capital as we talked about we are,  
 00:35:18 --> 00:35:20: you know, banking as a very heavily.  
 00:35:20 --> 00:35:24: Elated industry. So there are pretty defined boxes to stay  
 00:35:24 --> 00:35:25: within.  
 00:35:25 --> 00:35:27: But the great piece about it.

00:35:27 --> 00:35:31: There's a lot of you know programs that those who  
00:35:31 --> 00:35:35: can fit into and and meet the qualifications for conventional  
00:35:35 --> 00:35:35: landing.  
00:35:35 --> 00:35:39: There's tax credits. There's SBA various financing.  
00:35:39 --> 00:35:42: I'd like to find that we are solution or and  
00:35:42 --> 00:35:45: as we look at that and talk to businesses and  
00:35:45 --> 00:35:49: those who are looking and seeking financing.  
00:35:49 --> 00:35:53: But it's important as being the financial lifeline and access  
00:35:53 --> 00:35:54: to capital.  
00:35:54 --> 00:35:58: The intentionality as well as keeping with that discipline to  
00:35:58 --> 00:36:01: having a more diverse customer base,  
00:36:01 --> 00:36:05: having a more diverse you know employees as well an  
00:36:05 --> 00:36:08: when you look at with the diversity of thought,  
00:36:08 --> 00:36:11: all that brings you know it does relate to a  
00:36:11 --> 00:36:15: you know business goals and initiatives and well prevent high  
00:36:15 --> 00:36:17: performing businesses.  
00:36:17 --> 00:36:19: But it's also a company that has,  
00:36:19 --> 00:36:22: you know, again your customers,  
00:36:22 --> 00:36:26: your employees, your management and your board that best.  
00:36:26 --> 00:36:30: Represents and looks like the community that we serve.  
00:36:30 --> 00:36:30: Thank you.  
00:36:34 --> 00:36:38: Thank you, Patty. I think we have a common thread  
00:36:38 --> 00:36:43: here of intentionality and there's no better way to walk  
00:36:43 --> 00:36:47: the talk then really listening to you who are deep  
00:36:47 --> 00:36:53: in the industries engineering. Nothing gets built without  
capital,  
00:36:53 --> 00:36:58: so thank you, Patty for that insight into centric an  
00:36:58 --> 00:37:02: your your funding and actually the banks.  
00:37:02 --> 00:37:06: Makeup as well our third panelist is Jessica Myers who  
00:37:07 --> 00:37:09: we are so excited to have.  
00:37:09 --> 00:37:14: Jessica is president and owner of Gem Group A construction  
00:37:14 --> 00:37:19: management and construction firm based here in Harrisburg,  
00:37:19 --> 00:37:24: PA, but also doing construction work in many different  
regions  
00:37:24 --> 00:37:26: and states as well.  
00:37:26 --> 00:37:30: And Jessica, you are no stranger as well to maybe  
00:37:30 --> 00:37:32: being the only woman.  
00:37:32 --> 00:37:35: In our in our conversation or at a,  
00:37:35 --> 00:37:37: you know a a construction site,  
00:37:37 --> 00:37:41: so we're excited. Please share with us a little bit  
00:37:41 --> 00:37:45: of your background in history and we're excited to hear.  
00:37:45 --> 00:37:49: Hear your thoughts. Thank you for that wonderful  
introduction.

00:37:49 --> 00:37:52: And thank you for you Ally for inviting me to  
00:37:52 --> 00:37:56: participate in this really important conversation.  
00:37:56 --> 00:38:00: And I'm truly honored to be invited to speak with  
00:38:00 --> 00:38:04: two colleagues that I have a tremendous amount of respect  
00:38:04 --> 00:38:05: for Boney and Patty.  
00:38:05 --> 00:38:08: We've had the opportunity to work together professionally,  
00:38:08 --> 00:38:10: so it's great to be with them.  
00:38:10 --> 00:38:14: Today, so just a little bit about me and Jen  
00:38:14 --> 00:38:14: Group,  
00:38:14 --> 00:38:17: my company, so I've been in this business for 25  
00:38:17 --> 00:38:18: years.  
00:38:18 --> 00:38:22: My first job in the construction industry was actually as  
00:38:22 --> 00:38:25: a receptionist at a local construction company.  
00:38:25 --> 00:38:29: Really was just a summer job that led into akarere  
00:38:29 --> 00:38:31: when I graduated from college.  
00:38:31 --> 00:38:34: I had the opportunity to go work for a large  
00:38:34 --> 00:38:38: local construction company and I spent two years out in  
00:38:38 --> 00:38:41: the field on a very large project site,  
00:38:41 --> 00:38:44: which was a tremendous experience because I got.  
00:38:44 --> 00:38:46: See.  
00:38:46 --> 00:38:49: The business first hand out of the field and really  
00:38:50 --> 00:38:53: work side by side with the people that were doing  
00:38:53 --> 00:38:53: the work.  
00:38:53 --> 00:38:57: After that two years I had the opportunity to move  
00:38:57 --> 00:39:01: into a position doing business development and I spent about  
00:39:01 --> 00:39:02: eight years doing that.  
00:39:02 --> 00:39:07: It was really during that time doing business development out  
00:39:07 --> 00:39:07: there,  
00:39:07 --> 00:39:11: working on contract, getting contracts for the company I was  
00:39:11 --> 00:39:15: working for that I saw the lack of diverse businesses  
00:39:15 --> 00:39:17: subcontractors in our local community.  
00:39:17 --> 00:39:21: In Harrisburg it was at that time that I really  
00:39:21 --> 00:39:24: started thinking about starting my own business,  
00:39:24 --> 00:39:27: you know, to address that boy,  
00:39:27 --> 00:39:31: ultimately with the goal of being a woman owned business,  
00:39:31 --> 00:39:34: being a WBE, and being a DBE.  
00:39:34 --> 00:39:38: In addition to that, I had several individuals encouraging me  
00:39:38 --> 00:39:42: that also saw the need for diverse businesses in our  
00:39:42 --> 00:39:43: community.  
00:39:43 --> 00:39:46: So at the end of 2003 I did Start Jam  
00:39:46 --> 00:39:47: Group.  
00:39:47 --> 00:39:49: We are a construction services firm.

00:39:49 --> 00:39:54: We do design build. We do general construction and we  
00:39:54 --> 00:39:56: also do construction management.  
00:39:56 --> 00:40:00: As Ann said that work is all across Pennsylvania.  
00:40:00 --> 00:40:04: We also do work in Maryland and in Delaware.  
00:40:04 --> 00:40:07: Just a little bit about zhenru our purposes we built  
00:40:08 --> 00:40:09: to improve lives.  
00:40:09 --> 00:40:12: That's something that that's our rallying cry here,  
00:40:12 --> 00:40:15: Jenn, that's something that we take really seriously.  
00:40:15 --> 00:40:18: We believe that the work we do does make an  
00:40:18 --> 00:40:20: impact in the community.  
00:40:20 --> 00:40:23: We believe it impacts our employees or subcontractors,  
00:40:23 --> 00:40:26: and really, everyone that we touch.  
00:40:26 --> 00:40:28: So go ahead and move to the next line.  
00:40:30 --> 00:40:34: So this is a representation of the types of projects  
00:40:34 --> 00:40:35: that we do.  
00:40:35 --> 00:40:38: You will see there is a diverse range of projects  
00:40:38 --> 00:40:40: and markets that we work in.  
00:40:40 --> 00:40:44: Just a few things that I will say about these  
00:40:44 --> 00:40:44: projects.  
00:40:44 --> 00:40:48: There's a few on here that really took a leadership  
00:40:48 --> 00:40:52: role in diversity and made a leader made diversity K  
00:40:52 --> 00:40:56: key component of the project Susquehanna Art Museum.  
00:40:56 --> 00:40:58: They had a very specific,  
00:40:58 --> 00:41:01: defined goal for subcontractor. Participation,  
00:41:01 --> 00:41:05: diverse subcontractor participation on their jobs and gem  
group did  
00:41:06 --> 00:41:09: lead that effort as the general contractor and getting 20%  
00:41:09 --> 00:41:13: of the subcontractors on that job as diverse contractors point  
00:41:13 --> 00:41:16: at Sporting Hill on the lower left hand corner.  
00:41:16 --> 00:41:19: That project has not yet been built,  
00:41:19 --> 00:41:22: but that is being led by a developer called Monarch  
00:41:22 --> 00:41:23: Development.  
00:41:23 --> 00:41:26: It's a PHF, a low income tax credit project,  
00:41:26 --> 00:41:29: pH FA for some of you who would do business  
00:41:29 --> 00:41:29: with that,  
00:41:29 --> 00:41:32: know that they. Take diversity very seriously,  
00:41:32 --> 00:41:36: and a part of their scoring system of applications for  
00:41:36 --> 00:41:38: the tax credits is diversity.  
00:41:38 --> 00:41:41: So on that project in particular the developer Monarch took  
00:41:41 --> 00:41:42: a,  
00:41:42 --> 00:41:45: took leadership and putting together a diverse team for that  
00:41:45 --> 00:41:46: project.

00:41:46 --> 00:41:49: So there are many clients that we represent that do  
00:41:49 --> 00:41:52: an excellent job of making diversity a part of their  
00:41:52 --> 00:41:53: project teams,  
00:41:53 --> 00:41:56: and we'll talk a little bit more about that later  
00:41:56 --> 00:41:59: in the program so you can move to the next  
00:41:59 --> 00:41:59: slide.  
00:42:02 --> 00:42:06: So as it relates to Gem Group in our leadership  
00:42:06 --> 00:42:07: in diversity,  
00:42:07 --> 00:42:14: that really starts with us building a diverse team internally.  
00:42:14 --> 00:42:18: At gym group, 39% of our employees are diverse and  
00:42:18 --> 00:42:19: that's people of color.  
00:42:19 --> 00:42:22: That is women and that is also veterans.  
00:42:22 --> 00:42:24: We're very proud of that statistic.  
00:42:24 --> 00:42:28: However, we are not yet satisfied and really continued to  
00:42:28 --> 00:42:32: try to increase those numbers as we identify candidates and  
00:42:32 --> 00:42:35: I'll talk a little bit more about recruitment.  
00:42:35 --> 00:42:37: Hiring in just a minute.  
00:42:37 --> 00:42:41: Building diverse project teams. I think there are many of  
00:42:41 --> 00:42:45: us that are in positions that we can build diverse  
00:42:45 --> 00:42:45: project teams.  
00:42:45 --> 00:42:48: I know at Gem Group that we often get tasked  
00:42:48 --> 00:42:52: with putting together a project team with the architect,  
00:42:52 --> 00:42:56: the engineer, the consultants and the subcontractors and  
when we  
00:42:56 --> 00:43:00: do that we are intentional about making sure that we  
00:43:00 --> 00:43:01: have a diverse,  
00:43:01 --> 00:43:05: well rounded team and that is a practice.  
00:43:05 --> 00:43:09: That we really engage in every day here at Gem  
00:43:09 --> 00:43:09: Group.  
00:43:09 --> 00:43:14: And the other thing is differentiating diversity or differentiation  
with  
00:43:14 --> 00:43:15: diversity.  
00:43:15 --> 00:43:18: We kind of lead with that when we are talking  
00:43:18 --> 00:43:20: to clients about who Jim is.  
00:43:20 --> 00:43:23: We are a diverse organization and we believe that you  
00:43:23 --> 00:43:23: know,  
00:43:23 --> 00:43:28: bringing people together with varied experiences and  
backgrounds.  
00:43:28 --> 00:43:30: We think that promotes creativity,  
00:43:30 --> 00:43:35: problem solving, problem solving and better decision making  
and ultimately  
00:43:35 --> 00:43:38: a better project for our clients and so that is  
00:43:38 --> 00:43:40: something that we talk about.

00:43:40 --> 00:43:42: Something that's a part of our our brand.

00:43:42 --> 00:43:46: And Lastly, positive impact on the communities you see.

00:43:46 --> 00:43:49: Some of the photos on on the right,

00:43:49 --> 00:43:53: and one thing that's really important to gem is being

00:43:53 --> 00:43:59: involved in the community and being involved in diverse communities.

00:43:59 --> 00:44:02: So moving on to just talking a moment about recruitment,

00:44:02 --> 00:44:06: hiring and development, and kind of talking about how Jem

00:44:06 --> 00:44:09: Group builds our own internal diverse teams.

00:44:09 --> 00:44:12: I will say one of our challenges has been that

00:44:12 --> 00:44:15: we want to see a stronger pipeline of diverse candidates

00:44:15 --> 00:44:17: come through our office.

00:44:17 --> 00:44:20: So one of the things that we have been very

00:44:20 --> 00:44:23: active in doing is promoting careers in the AEC industry,

00:44:23 --> 00:44:28: really trying to have early engagement with peaceful students in

00:44:28 --> 00:44:29: diverse communities.

00:44:29 --> 00:44:32: Some examples about one of our clients was the boys

00:44:32 --> 00:44:33: and Girls Club,

00:44:33 --> 00:44:36: and while we were there working in their space,

00:44:36 --> 00:44:40: we took the opportunity to invite those children and individuals

00:44:40 --> 00:44:44: participating in the programs to tour our job sites.

00:44:44 --> 00:44:47: The picture that you see up there is our Superintendent.

00:44:47 --> 00:44:50: He is the hard hat and the kids in the

00:44:50 --> 00:44:51: lower left hand corner.

00:44:51 --> 00:44:55: You know he's showing them the tools he's talking about.

00:44:55 --> 00:44:56: What he does every day.

00:44:56 --> 00:45:00: We really believe that that early engagement is critical.

00:45:00 --> 00:45:04: To show students the opportunities in this industry and we've

00:45:04 --> 00:45:07: started to see some of those results.

00:45:07 --> 00:45:08: Other things that we do.

00:45:08 --> 00:45:12: Our job shadows. We provide internships and things of that

00:45:12 --> 00:45:13: nature,

00:45:13 --> 00:45:17: so we really feel like that early engagement is really

00:45:17 --> 00:45:19: key to getting diversity.

00:45:19 --> 00:45:21: In our company and Lastly,

00:45:21 --> 00:45:25: and we're going to speak about this later in the

00:45:25 --> 00:45:30: program is the important of mentorship and providing leadership training

00:45:30 --> 00:45:33: to individuals in our company.

00:45:33 --> 00:45:37: So with that I will turn it back over to

00:45:37 --> 00:45:37: Ann.



00:45:37 --> 00:45:41: Thank you Jessica Ann. Would all of you panelists please  
00:45:41 --> 00:45:43: turn on your video an audio?  
00:45:47 --> 00:45:50: And thank you for all of the insights.  
00:45:50 --> 00:45:53: I mean it was. It was so important.  
00:45:53 --> 00:45:57: Again, speaking to you Ally and what our framework for  
00:45:57 --> 00:45:58: action is.  
00:45:58 --> 00:46:01: That's the access to knowledge and insights,  
00:46:01 --> 00:46:05: which is step one. So then we can start to  
00:46:05 --> 00:46:06: make sure.  
00:46:06 --> 00:46:11: Communities of color and women and diversity across the  
board  
00:46:11 --> 00:46:15: understand what their next steps might be to.  
00:46:15 --> 00:46:20: Either, you know, find a career in land use management  
00:46:20 --> 00:46:22: or building banking engineering.  
00:46:22 --> 00:46:27: So we're going to breaking the questions into three different  
00:46:27 --> 00:46:28: categories,  
00:46:28 --> 00:46:32: those personal and professional development.  
00:46:32 --> 00:46:37: As DCI relates to each of you and then organizational  
00:46:37 --> 00:46:37: change.  
00:46:37 --> 00:46:39: And then a few in space,  
00:46:39 --> 00:46:43: an industry change because you're all in different industries,  
00:46:43 --> 00:46:47: but each of you have tremendous impact in land use  
00:46:47 --> 00:46:47: decisions.  
00:46:47 --> 00:46:50: Now you know in in many different areas.  
00:46:50 --> 00:46:52: So the first question is,  
00:46:52 --> 00:46:55: can you describe the role you see for mentorship and  
00:46:55 --> 00:46:57: improving diversity,  
00:46:57 --> 00:46:59: equity, inclusion in our industries,  
00:46:59 --> 00:47:02: and have you personally benefited?  
00:47:02 --> 00:47:04: Benefited from a mentor, mentor,  
00:47:04 --> 00:47:07: mentee relationship? Now several you touched on that?  
00:47:07 --> 00:47:11: Boney, I'm going to just direct that at you first.  
00:47:11 --> 00:47:14: I love the mentor protege.  
00:47:14 --> 00:47:15: A phrase you've been saying,  
00:47:15 --> 00:47:18: and I know that you've been involved with that for  
00:47:18 --> 00:47:20: all of our listeners and viewers.  
00:47:20 --> 00:47:23: Can you explain a little bit what that is and  
00:47:23 --> 00:47:26: how someone might take advantage of that?  
00:47:26 --> 00:47:31: Yes, and the mentor protege discussion was actually  
presented to  
00:47:31 --> 00:47:34: me number of years ago and as.  
00:47:34 --> 00:47:36: We've expanded the business. We've done work.

00:47:36 --> 00:47:39: Actually, it's for most of the East Coast and meta  
00:47:39 --> 00:47:41: law firms in Houston,  
00:47:41 --> 00:47:44: Atlanta different areas, so we were actually were invited.  
00:47:44 --> 00:47:47: Being more experienced firm to be a protege from the  
00:47:47 --> 00:47:50: large utility company is really.  
00:47:50 --> 00:47:53: A very organized process and expanding diversity in their  
ranks  
00:47:54 --> 00:47:57: to point that it's ingrained in the culture of the  
00:47:57 --> 00:48:01: organization and the meta protege program basically is trying  
to  
00:48:01 --> 00:48:05: partner you. With an individual within their organization to  
sort  
00:48:05 --> 00:48:08: of help you understand how they want to see things  
00:48:08 --> 00:48:08: done.  
00:48:08 --> 00:48:11: I mean, they realize that lot is larger.  
00:48:11 --> 00:48:14: Toyota Company is majority the population.  
00:48:14 --> 00:48:16: I think in 2045.  
00:48:16 --> 00:48:19: You have a minority majority population in the US,  
00:48:19 --> 00:48:22: so they they realized their customer base and who they're  
00:48:22 --> 00:48:25: serving is going to minority based so they they have  
00:48:25 --> 00:48:26: a strong incentive.  
00:48:26 --> 00:48:28: So they're very organized process,  
00:48:28 --> 00:48:31: and we've been actually been a mentor and also a  
00:48:31 --> 00:48:33: protege in these environments.  
00:48:33 --> 00:48:36: But recently we've been on the mentor Side More which  
00:48:36 --> 00:48:39: we enjoy the recently discussed during my introduction was  
the  
00:48:39 --> 00:48:40: one with PennDOT,  
00:48:40 --> 00:48:43: and if you look at transportation an enormous amount of  
00:48:43 --> 00:48:46: money is being funneled in infrastructure and will continue to  
00:48:47 --> 00:48:48: be followed the infrastructure.  
00:48:48 --> 00:48:52: So the Department is concerned unallowed disparity studies  
an.  
00:48:52 --> 00:48:55: Unfortunately, there's quite a bit of disparity in terms of  
00:48:55 --> 00:48:58: companies being involved in transportation as a whole.  
00:48:58 --> 00:48:59: And why is that so?  
00:48:59 --> 00:49:02: We've been working with PennDOT in terms of helping them  
00:49:02 --> 00:49:05: develop and mentor Protege program and to some degree.  
00:49:05 --> 00:49:08: Breaking the mold. You know if you look at you  
00:49:08 --> 00:49:11: the same company you have the same minority firms.  
00:49:11 --> 00:49:14: How can we get more minority firms involved,  
00:49:14 --> 00:49:16: right? And so we've been hoping it's a matter of  
00:49:17 --> 00:49:18: getting information out there.

00:49:18 --> 00:49:20: It's a matter of getting engagement.  
00:49:20 --> 00:49:24: Everybody's got responsible. It's a two way discussion.  
00:49:24 --> 00:49:28: The responsibility on the meter side is also responsive approaches  
00:49:28 --> 00:49:29: side and doing their part.  
00:49:29 --> 00:49:32: But yeah, so but it's a good strong program.  
00:49:32 --> 00:49:35: I think it helps companies that really want to get  
00:49:35 --> 00:49:36: into industries.  
00:49:36 --> 00:49:40: Understand the challenges, understand what's needed to really engage because  
00:49:40 --> 00:49:43: you know the world's a fast moving place and then  
00:49:43 --> 00:49:47: it's all about accountability and and really finding things that  
00:49:47 --> 00:49:50: are really needed out there filling that void.  
00:49:50 --> 00:49:54: Good thank you. Well I'm thrilled that you and Patty  
00:49:54 --> 00:49:58: and Jessica are willing to share your insights and make  
00:49:58 --> 00:49:59: some changes.  
00:49:59 --> 00:50:02: I'm sure in the future Patty can you share a  
00:50:02 --> 00:50:04: little bit about centrics?  
00:50:04 --> 00:50:08: I know you have a robust informal mentoring network.  
00:50:08 --> 00:50:12: And with your you know high percentage of women in  
00:50:12 --> 00:50:13: executive leadership,  
00:50:13 --> 00:50:16: so there's a tremendous example.  
00:50:16 --> 00:50:19: One of your slides did see one to be one,  
00:50:19 --> 00:50:23: so you know when someone Googles centric bank and and  
00:50:23 --> 00:50:25: looks at what they find,  
00:50:25 --> 00:50:29: I think especially young women would be very encouraged.  
00:50:29 --> 00:50:32: Like OK, maybe that is a place for me.  
00:50:32 --> 00:50:35: Can you speak a little bit about Centrics?  
00:50:35 --> 00:50:39: Your mentoring opportunities at the back?  
00:50:39 --> 00:50:41: Sure, and happy to do so,  
00:50:41 --> 00:50:43: so we do. As you mentioned,  
00:50:43 --> 00:50:48: we do have a very robust informal program within centric  
00:50:48 --> 00:50:51: and that is coming from those at RC level team  
00:50:51 --> 00:50:55: and even to our middle management and working with those,  
00:50:55 --> 00:51:00: especially as we identify you know who are your potentials,  
00:51:00 --> 00:51:04: your rising stars within the organization and to identify maybe  
00:51:04 --> 00:51:08: more skills and maybe more things that they would need  
00:51:09 --> 00:51:10: again skills.  
00:51:10 --> 00:51:13: For that next opportunity, an getting that next level ready  
00:51:14 --> 00:51:17: I mentioned in the very beginning I talked about,  
00:51:17 --> 00:51:19: you know, when this occur,  
00:51:19 --> 00:51:21: dinar or probably our infancy years.

00:51:21 --> 00:51:25: Those first several years we haven't and one I particularly  
00:51:25 --> 00:51:29: personally mentored was our CFO and as we were looking  
00:51:29 --> 00:51:32: to explore with our rapid growth and we know our  
00:51:32 --> 00:51:36: goal with capital raising, we were always in the process  
00:51:36 --> 00:51:37: of raising capital.  
00:51:37 --> 00:51:41: Knowing the next step of becoming a publicly traded stock.  
00:51:41 --> 00:51:45: Company ticker symbol with the goal and aspiration to be  
00:51:45 --> 00:51:49: on NASDAQ was getting ready for those institutional investor  
meetings  
00:51:49 --> 00:51:53: and from there you know I personally worked with the  
00:51:53 --> 00:51:54: CFO on some, you know,  
00:51:54 --> 00:51:58: recommending some things that she should be doing,  
00:51:58 --> 00:52:00: what she should be looking into,  
00:52:00 --> 00:52:04: other involvement, you know, outside of other CFO groups,  
00:52:04 --> 00:52:07: connecting with other CFO's of larger organizations,  
00:52:07 --> 00:52:11: not only with Pennsylvania bankers but as well as with  
00:52:11 --> 00:52:13: American Bankers Association.  
00:52:13 --> 00:52:15: We did a lot of different kind of,  
00:52:15 --> 00:52:19: you know, dry runs of with our dog and pony  
00:52:19 --> 00:52:23: shows an ensuring that you know in our presentations in  
00:52:23 --> 00:52:26: all aspects that we were ready to meet with those  
00:52:26 --> 00:52:31: institutional investors. The hedge funds and that we knew  
information  
00:52:31 --> 00:52:32: inside and out.  
00:52:32 --> 00:52:36: But also, you know, portraying that level of confidence.  
00:52:36 --> 00:52:38: We've done that with so many.  
00:52:38 --> 00:52:41: For example, our head of RIT,  
00:52:41 --> 00:52:44: Claire Finkenbinder, has done that within.  
00:52:44 --> 00:52:48: Again, there's rising stars recruiting others who may be,  
00:52:48 --> 00:52:52: you know, some of the positions and and you're marking  
00:52:52 --> 00:52:54: them for what that next role can be,  
00:52:54 --> 00:52:58: and that personal mentor ship the education,  
00:52:58 --> 00:53:01: the training I think has been crucial over the scene.  
00:53:01 --> 00:53:05: The benefit of these mentorships of those who have either  
00:53:05 --> 00:53:09: really have up their game and delivering on that a  
00:53:09 --> 00:53:13: game and their perspective roles as a direct benefit from  
00:53:13 --> 00:53:16: that mentorship. You know, but others,  
00:53:16 --> 00:53:19: as we've seen you know over the past ten years,  
00:53:19 --> 00:53:21: some of them have, you know,  
00:53:21 --> 00:53:23: various promotions to where they moved,  
00:53:23 --> 00:53:24: and some of them who.  
00:53:24 --> 00:53:28: Maybe somebody who was in a deposit operations an you  
00:53:28 --> 00:53:28: know,

00:53:28 --> 00:53:31: as she moved her way up today became.

00:53:31 --> 00:53:34: She's had a bar full operational area and that was

00:53:34 --> 00:53:36: a direct benefit of the mentoring.

00:53:36 --> 00:53:39: So those are some of the things that you know

00:53:39 --> 00:53:42: we have been doing and the direct you know,

00:53:42 --> 00:53:46: really acknowledging and recognizing those of a rising star.

00:53:46 --> 00:53:49: And helping those yet to those next levels and those

00:53:49 --> 00:53:51: skills that they need.

00:53:51 --> 00:53:54: Good thank you, Patty, Jessica and I know where we

00:53:54 --> 00:53:57: could talk all day I think and learn from each

00:53:57 --> 00:54:01: other about all these topics that we need to discuss.

00:54:01 --> 00:54:06: Can you share briefly about the mentorship opportunities  
within Gym

00:54:06 --> 00:54:06: Group an?

00:54:06 --> 00:54:09: Have you personally benefited from,

00:54:09 --> 00:54:13: you know, being a mentor or mentee.

00:54:13 --> 00:54:17: Yeah, thanks man. So our mentorship program at Jenn is

00:54:17 --> 00:54:19: what I would call it informal,

00:54:19 --> 00:54:21: but it certainly does exist.

00:54:21 --> 00:54:25: Every individual that works at Gym Group gets what we

00:54:25 --> 00:54:27: call an individual development plan.

00:54:27 --> 00:54:30: It's a great one pager that really talks a lot

00:54:31 --> 00:54:33: about individuals personal goals,

00:54:33 --> 00:54:37: their professional goals, and ultimately what it will take to

00:54:37 --> 00:54:39: help them reach those goals.

00:54:39 --> 00:54:43: It could be education, it could be more experience,

00:54:43 --> 00:54:45: it could be. You know,

00:54:45 --> 00:54:48: joining an industry organization to you know,

00:54:48 --> 00:54:50: tune their skills. A variety of things,

00:54:50 --> 00:54:53: but that is an active document that we use with

00:54:53 --> 00:54:56: our employees to help develop and mentor them.

00:54:56 --> 00:54:59: We also do one on ones with our employees so

00:54:59 --> 00:55:02: that we make sure that we're moving the needle.

00:55:02 --> 00:55:06: And really, you know, developing and growing our individuals  
at

00:55:06 --> 00:55:07: gym Group.

00:55:07 --> 00:55:10: So that's kind of how we handle our mentorship.

00:55:10 --> 00:55:13: From up from an informal standpoint and then providing you

00:55:13 --> 00:55:14: know,

00:55:14 --> 00:55:18: leadership training. We have several individuals at Gem  
Group that

00:55:18 --> 00:55:21: participate in leadership groups outside of Jam,

00:55:21 --> 00:55:27: including vantage and opportunities with some of our trade organizations.

00:55:27 --> 00:55:30: So, and I believe in mentorship so much because I

00:55:30 --> 00:55:33: have benefited greatly from it over the years.

00:55:33 --> 00:55:35: When I think back to you know,

00:55:35 --> 00:55:38: some of my mentors. I don't think they knew that

00:55:38 --> 00:55:42: they were my mentors when I first started my business.

00:55:42 --> 00:55:43: I was only 30 years old,

00:55:43 --> 00:55:46: so you can imagine that there was a lot that

00:55:46 --> 00:55:47: I didn't know,

00:55:47 --> 00:55:51: and so I really took the opportunity to surround myself

00:55:51 --> 00:55:54: with accomplished leaders and business people that I knew.

00:55:54 --> 00:55:57: And I learned a tremendous amount from them.

00:55:57 --> 00:56:01: And I can honestly say without those relationships I would

00:56:01 --> 00:56:04: not have been able to grow jam at the pace

00:56:05 --> 00:56:05: that I did.

00:56:05 --> 00:56:08: I also think that mentorship doesn't end,

00:56:08 --> 00:56:11: no matter where you are in your karere.

00:56:11 --> 00:56:14: I've been in a vantage group which is a peer

00:56:14 --> 00:56:17: CEO peer group for over 10 years and I get

00:56:17 --> 00:56:21: peer mentoring from that group of individuals.

00:56:21 --> 00:56:24: So I again I don't think that that expires.

00:56:24 --> 00:56:28: I think mentoring can benefit you at all stages of

00:56:28 --> 00:56:29: your career in.

00:56:29 --> 00:56:33: And that's why I still mentor in and give back

00:56:33 --> 00:56:36: in that in that capacity.

00:56:36 --> 00:56:40: Good thank you, Boni. We're going to move on to

00:56:40 --> 00:56:45: organizational change and ask you are there best practices

00:56:46 --> 00:56:48: around

00:56:46 --> 00:56:48: recruitment at Dogwood Engineering?

00:56:48 --> 00:56:51: Especially around hiring diverse candidates,

00:56:51 --> 00:56:55: persons of color. Do you have any best practices you

00:56:55 --> 00:56:58: could share with us on on how dogwoods do?

00:56:58 --> 00:57:01: Yeah, I think the the discussion as we have as

00:57:01 --> 00:57:05: much diversity including committee within the company and I

00:57:05 --> 00:57:07: personally

00:57:05 --> 00:57:07: spend time with our HR group.

00:57:07 --> 00:57:10: To discuss what are we doing in terms of expanding

00:57:10 --> 00:57:11: diversity,

00:57:11 --> 00:57:14: you know. Recently I was being interviewed by a client,

00:57:14 --> 00:57:18: Municipal, Klein, and. And they asked me how diverse is

00:57:18 --> 00:57:19: your organization?

00:57:19 --> 00:57:21: And I I got a chuckle from that,

00:57:21 --> 00:57:24: but it is. It's going to be a question that  
 00:57:24 --> 00:57:27: a lot of organization will be asking their suppliers is  
 00:57:27 --> 00:57:31: what are you doing and what's being done so internally  
 00:57:31 --> 00:57:34: for us? You know we're expanding the locations that we  
 00:57:34 --> 00:57:37: are looking for potential candidates.  
 00:57:37 --> 00:57:39: You know, as I mentioned before this story,  
 00:57:39 --> 00:57:44: black community colleges, colleges and universities and  
 where else can  
  
 00:57:44 --> 00:57:46: you look for meant when I say mentor,  
 00:57:46 --> 00:57:50: we also the scholarships we step in internal scholarship to  
 00:57:50 --> 00:57:51: encourage.  
 00:57:51 --> 00:57:53: More kids get involved. Problem.  
 00:57:53 --> 00:57:55: We have a professional services is.  
 00:57:55 --> 00:57:58: It's a really shortage of of diverse kids getting involved  
 00:57:58 --> 00:58:00: in the technical field,  
 00:58:00 --> 00:58:02: so that's a challenge. So we have to look a  
 00:58:02 --> 00:58:03: little further.  
 00:58:03 --> 00:58:05: But there's also a network so we are.  
 00:58:05 --> 00:58:08: We have expanded and we do monitor that more and  
 00:58:08 --> 00:58:10: more and I would say you know,  
 00:58:10 --> 00:58:12: I think we have a long way to go,  
 00:58:12 --> 00:58:15: but it's something that we're trying everything we can in  
 00:58:15 --> 00:58:16: terms of internships,  
 00:58:16 --> 00:58:19: bringing diverse kids and for internship,  
 00:58:19 --> 00:58:21: San providing water support we can.  
 00:58:21 --> 00:58:26: And local levels and local schools to expand diversity in  
 00:58:26 --> 00:58:28: the technical fields.  
 00:58:28 --> 00:58:31: Good thank you Patty. Can you share a little bit  
 00:58:31 --> 00:58:34: about your organization's thinking around diversity,  
 00:58:34 --> 00:58:40: equity, inclusion and how it's evolved over the past year?  
 00:58:40 --> 00:58:43: Be sure you know when we look at the core  
 00:58:43 --> 00:58:45: of the DE and I you know one of the  
 00:58:45 --> 00:58:49: pieces we have done an I made the introduction to  
 00:58:49 --> 00:58:52: our head of human resources and she is working with  
 00:58:52 --> 00:58:56: a student from Georgetown who is on the master student  
 00:58:56 --> 00:59:01: who's working on their capstone project and their Capstone  
 project  
 00:59:01 --> 00:59:03: is on diversity and inclusion.  
 00:59:03 --> 00:59:07: An from that, you know these this individual is working  
 00:59:07 --> 00:59:10: with our HR an looking at the policy's that we  
 00:59:10 --> 00:59:11: have.  
 00:59:11 --> 00:59:13: And to enhance our policy's,

00:59:13 --> 00:59:15: you know, what are, you know,  
00:59:15 --> 00:59:18: sending out even some questionnaires to our employees and  
and  
00:59:19 --> 00:59:19: their view?  
00:59:19 --> 00:59:21: Do we have a diverse organization?  
00:59:21 --> 00:59:24: And I don't mean just the diverse you know,  
00:59:24 --> 00:59:28: looking around within our people in our team members,  
00:59:28 --> 00:59:31: but also a diversity of thought within our organization.  
00:59:31 --> 00:59:34: And is that embraced? So that has been a project  
00:59:35 --> 00:59:36: we've been working on.  
00:59:36 --> 00:59:39: Now, with moving into the second semester of that,  
00:59:39 --> 00:59:43: and as we continue to help elevate what we're doing  
00:59:43 --> 00:59:44: at centric.  
00:59:44 --> 00:59:49: Earlier I'd mentioned reaching out with intentionality to  
various number  
00:59:49 --> 00:59:51: one with various chambers,  
00:59:51 --> 00:59:54: and that's looking at his point as of diversity in  
00:59:54 --> 00:59:55: with our customer base.  
00:59:55 --> 00:59:59: If you know a lot of times the commercial lenders  
00:59:59 --> 01:00:01: are working with those who you know,  
01:00:01 --> 01:00:05: usually it's the same point of their centers of influence  
01:00:05 --> 01:00:06: and their Contacts.  
01:00:06 --> 01:00:10: An IF we continue always go to those same normal  
01:00:10 --> 01:00:10: Contacts.  
01:00:10 --> 01:00:14: Your customer base is going to remain the same.  
01:00:14 --> 01:00:16: With having intentionality in reaching out,  
01:00:16 --> 01:00:20: and you know, talking about the services we offer,  
01:00:20 --> 01:00:22: the consultative approach and working,  
01:00:22 --> 01:00:26: you know, with any and all businesses and those who  
01:00:26 --> 01:00:27: want to start a business,  
01:00:27 --> 01:00:31: the building you know we're willing to sit down to  
01:00:31 --> 01:00:34: have that conversation to help anybody and and to make  
01:00:34 --> 01:00:36: that a more diverse,  
01:00:36 --> 01:00:38: intentional reach out as far as recruiting.  
01:00:38 --> 01:00:42: You know, we've also over the past year and a  
01:00:42 --> 01:00:44: half to two years.  
01:00:44 --> 01:00:48: You know, bringing in more interns within our organization as  
01:00:48 --> 01:00:48: well,  
01:00:48 --> 01:00:52: which adds another diversity of age 2 or organization,  
01:00:52 --> 01:00:56: which we've made a big impact over the past four  
01:00:56 --> 01:01:00: to five years with looking at millennials grown from less  
01:01:00 --> 01:01:00: than 5%



01:01:00 --> 01:01:02: / 30% of our workforce.  
01:01:02 --> 01:01:06: But also, you know, it's a point of bringing in  
01:01:06 --> 01:01:07: those useful,  
01:01:07 --> 01:01:09: but also bringing a diverse.  
01:01:09 --> 01:01:12: You know individuals is a diversity in the gender or  
01:01:13 --> 01:01:15: those of the people of color.  
01:01:15 --> 01:01:17: Of reaching out in those regards,  
01:01:17 --> 01:01:18: we have been doing that.  
01:01:18 --> 01:01:23: We've also been reaching out of maybe various Department  
heads.  
01:01:23 --> 01:01:25: There's various groups within college,  
01:01:25 --> 01:01:29: you know, focusing on maybe the African American Accounts  
Group,  
01:01:29 --> 01:01:32: and so we have been doing that and I am  
01:01:32 --> 01:01:34: on the American Bankers Association,  
01:01:34 --> 01:01:37: their inaugural DI Advisory Committee,  
01:01:37 --> 01:01:40: and those are some things that we have been actively  
01:01:40 --> 01:01:41: talking about.  
01:01:41 --> 01:01:45: You know? How do we improve the diversity within our  
01:01:45 --> 01:01:46: banking industry?  
01:01:46 --> 01:01:49: Which is not a very diverse when you look at  
01:01:49 --> 01:01:49: our,  
01:01:49 --> 01:01:52: you know employee base is an as well as a  
01:01:52 --> 01:01:54: lot of our customer base.  
01:01:54 --> 01:01:57: So that has been in a very intentionality coming from  
01:01:57 --> 01:01:58: our,  
01:01:58 --> 01:02:01: you know key associations as well.  
01:02:01 --> 01:02:04: Thank you Patty, and unfortunately,  
01:02:04 --> 01:02:06: we're running out of time,  
01:02:06 --> 01:02:09: Jessica. So you I'm going to have you round out  
01:02:09 --> 01:02:13: the industry change question before we close.  
01:02:13 --> 01:02:16: So what role can industry groups like you lie in  
01:02:17 --> 01:02:21: its members play in lowering barriers to improve diversity,  
01:02:21 --> 01:02:23: equity and inclusion?  
01:02:25 --> 01:02:27: Thanks, Ann. Well first of all,  
01:02:27 --> 01:02:31: having programs like this. You know if you look at  
01:02:31 --> 01:02:35: you all eyes website and there's some really fantastic content  
01:02:35 --> 01:02:38: around this topic and raising awareness.  
01:02:38 --> 01:02:40: So I think you will like you know you lie  
01:02:40 --> 01:02:44: is setting a great example for other Association and industry  
01:02:45 --> 01:02:46: groups to follow.  
01:02:46 --> 01:02:49: And I think you know really making it a priority  
01:02:49 --> 01:02:50: is important.

01:02:50 --> 01:02:53: I also think you know outside of groups like you  
01:02:53 --> 01:02:55: Ally is that owners you know.  
01:02:55 --> 01:02:59: The people were doing business with need to make it  
01:02:59 --> 01:02:59: a priority.  
01:02:59 --> 01:03:03: We have clients that make diversity part of their selection  
01:03:03 --> 01:03:07: criteria and then we have clients that will have diversity  
01:03:07 --> 01:03:09: language in an RFP.  
01:03:09 --> 01:03:11: But it really doesn't have any teeth.  
01:03:11 --> 01:03:13: You know it's good faith,  
01:03:13 --> 01:03:16: effort or diversity is important to us,  
01:03:16 --> 01:03:19: but there are really no meaningful goals around it and  
01:03:19 --> 01:03:23: then we have some clients that you know it's absent  
01:03:23 --> 01:03:24: from the conversation.  
01:03:24 --> 01:03:27: And so I think. Owners really have a part to  
01:03:28 --> 01:03:31: play in this and and letting firms know that diversity  
01:03:31 --> 01:03:34: is important to us and that is going to be  
01:03:34 --> 01:03:38: a selection criteria. So consider that when you're building  
your  
01:03:39 --> 01:03:39: team.  
01:03:39 --> 01:03:42: So for me that would be a major benefit.  
01:03:42 --> 01:03:45: You know in this conversation to see owners of clients  
01:03:45 --> 01:03:49: really take a leadership role in making diversity.  
01:03:49 --> 01:03:52: Part of why they hire people.  
01:03:52 --> 01:03:55: Thank you Jessica Ann just a huge thanks Bony,  
01:03:55 --> 01:04:00: Dogwood, Patti Husic, Jessica Myers for sharing your time  
and  
01:04:00 --> 01:04:01: your insights.  
01:04:01 --> 01:04:04: There's so much to do going forward.  
01:04:04 --> 01:04:07: A lot of change is going to happen.  
01:04:07 --> 01:04:11: We're adding diversity to our pipeline to our projects to  
01:04:11 --> 01:04:13: our team as well.  
01:04:13 --> 01:04:17: Thank you all for sharing your knowledge and Laura.  
01:04:17 --> 01:04:21: I think you're going to close this out yes.  
01:04:21 --> 01:04:25: Wonderful thank you so much to the entire panel to  
01:04:25 --> 01:04:28: enter the chairs of the Central Pennsylvania Council for your  
01:04:28 --> 01:04:32: work in putting this together and really having this important  
01:04:32 --> 01:04:36: conversation and hopefully what is the beginning.  
01:04:36 --> 01:04:39: As you heard in the beginning from Jeremy and Alan,  
01:04:39 --> 01:04:41: this is a folk area of focus for us at  
01:04:41 --> 01:04:45: the District Council and for us at you alive globally.  
01:04:45 --> 01:04:48: So again, I want to thank everyone for participating today  
01:04:49 --> 01:04:50: and in the future.

01:04:50 --> 01:04:52: I also want to thank again our programs.  
01:04:52 --> 01:04:55: Sponsors for making today's conversation possible.  
01:04:55 --> 01:04:58: The high real estate group en Route 2 and while  
01:04:58 --> 01:05:00: this is all we have time for today,  
01:05:00 --> 01:05:03: we hope that you continue to join us in all  
01:05:03 --> 01:05:04: these conversations.  
01:05:04 --> 01:05:06: Think about your own organization.  
01:05:06 --> 01:05:09: Check out our diversity, equity and Inclusion framework,  
01:05:09 --> 01:05:12: which really gets a little bit more into some of  
01:05:12 --> 01:05:14: this work that we're exploring.  
01:05:14 --> 01:05:17: And, of course, if you're not already involved in uali,  
01:05:17 --> 01:05:19: we would love to talk with you,  
01:05:19 --> 01:05:22: hear from you. Have you join us whenever you're watching  
01:05:22 --> 01:05:22: this,  
01:05:22 --> 01:05:26: we always have a number of upcoming activities programs.  
01:05:26 --> 01:05:29: And ways for members to convene on important topics.  
01:05:29 --> 01:05:31: So please feel free to check us out.  
01:05:31 --> 01:05:33: Thank you again everyone for being here.  
01:05:33 --> 01:05:34: Stay well, take care.

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