

# 20 20

DOUG BIBBY President



GREG WILLETT
Chief Economist













GREG FAULKNER, AIA, NCARB President

HUMPHREYS & PARTNERS ARCHITECTS, LP

WALTER HUGHES, AIA Chief Innovation Officer

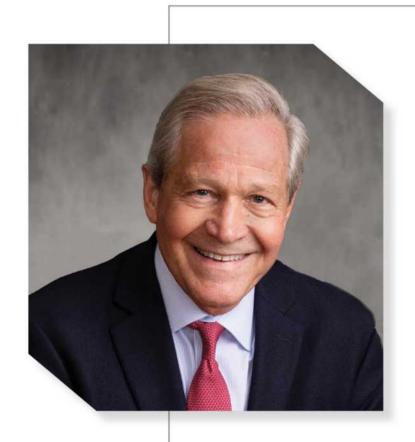
HUMPHREYS & PARTNERS ARCHITECTS, L.P.

CHELSEA DORA-SHIBLEY, RID VP of Interior Design





# 20 20



### **DOUG BIBBY**

President

NATIONAL MULTIFAMILY HOUSING COUNCIL 1775 Eye Street, N.W., Suite 1100 Washington, D.C. 20006 202-974-2300 dbibby@nmhc.org



#### **MULTIFAMILY MARKET**



#### APARTMENT LEADERSHIP RESIDES HERE

#### The Multifamily Market

Humphreys & Partners Apartment Development Webinar

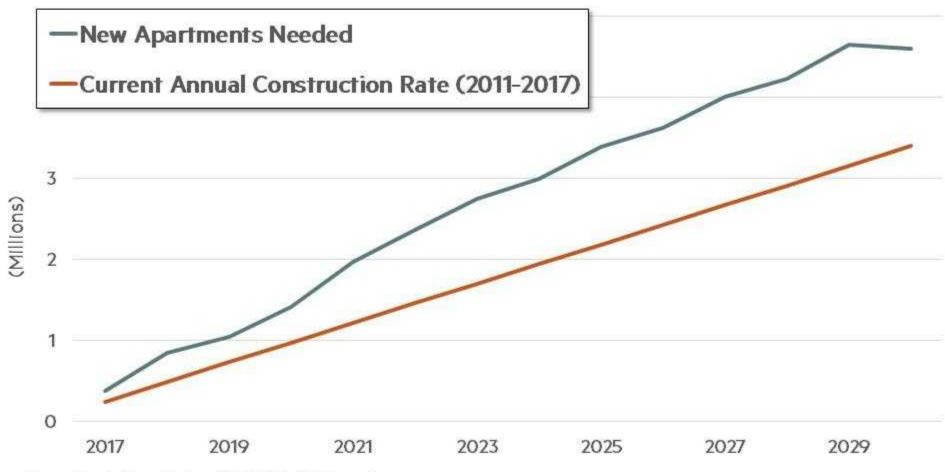
Presented By, Douglas Bibby

#### STATE OF THE INDUSTRY

- Despite softening of rents, near-term prospects remain solid:
  - Rent moderation, not declines in most cases
  - Demand/absorption remain strong
  - Supply catching up, but is still behind
- International Capital still very attracted to multifamily, although our lead has shortened
- Domestic debt and equity capital abundant; underwriting remains conservative
- Buying deals continues to be challenging, given prices, cap rates and abundant capital



### WE MUST BUILD 328,000 NEW APARTMENTS PER YEAR BY 2030 TO KEEP UP WITH DEMAND



Source: Hoyt Advisory Services; NMHC/NAA; U.S. Census Bureau.



#### FUTURE APARTMENT DEMAND BY METRO AREA

MSA	# New Units Needed by 2030
New York	278,634
Dallas-Fort Worth	266,296
Houston	214,176
Miami	185,414
Atlanta	170,095
Los Angeles	164,201
Phoenix	150,302
Orlando	130,177
Washington, D.C.	127,962
Austin	114,076

Source: Hoyt Advisory Services; NMHC/NAA.



#### WHAT WE'RE WORKING ON AT THE FEDERAL LEVEL

NMHC focuses on a broad range of legislative and regulatory issues that impact all facets of the multifamily and student housing industry.

#### Primary Policy Priorities & Goals:

- Flood Insurance
- Fair Housing
- Data Security and Privacy
- Housing Finance Reform

- Consumer Reporting
- Tax
- Section 8 Rental Assistance
- Accessibility
- Building Codes
- Music Licensing

#### Other Significant Priorities and Goals:

- Construction & Development
- Housing Policy
- Finance and Capital Markets
- Energy Policy
- Immigration
- Operations

- Risk Management
- Labor & Employment
- Military Housing



### NMHC PRIMARY POLICY ISSUES

- Housing Affordability & Regulatory Barriers
- Tax Reform Implementation
- Housing Finance Reform
- Building Codes
- Flood Insurance
- Broadband and Connectivity
- Data Security and Privacy





### HOUSING AFFORDABILITY IMPACTS THE INDUSTRY

- Housing Demand is strong
- Additional supply is coming online
- Industry continues to attract investment
- Yet, the country is facing a housing affordability crisis





#### AFFORDABILITY AND REGULATORY BARRIERS

- NMHC Housing Affordability
   Toolkit addresses local regulatory
   barriers
- White House establishes Council on Eliminating Regulatory Barriers to Affordable Housing
- Multiple presidential candidates and legislators introduce regulatory reducing legislation



growing homes together



#### 2019 YEAR-END TAX PRIORITIES

- Congress is considering multifamily tax provisions to year-end legislation
- NMHC is advocating for:
- 30-Year Depreciation Fix: Working to ensure that a 30-year depreciation period applies to multifamily buildings placed in service before and after 2018 for taxpayers electing out of limits on interest deductibility.
- Energy Efficiency Tax Credits: Extending the expired New Energy Efficient Home Credit and the Energy Efficient Commercial Buildings Deduction.
- Low-Income Housing Tax Credit: 50 percent increase in credits available to be allocated, as well making permanent the 12.5 percent increase in credits available for 2018-2021.



#### HOUSING FINANCE REFORM

- Presidential Memorandum Directs Treasury and HUD to Develop Housing Finance Reform Plans
  - Issued September 5
- Recommended Administrative and Legislative Steps
  - Constrain footprint
  - Serve only affordable and moderate-income properties
  - Modify exclusions
  - Change UW practices to recognize rent control
  - Changes could be implemented by FHFA Director and Treasury



#### FHFA DIRECTOR TAKES ACTION

- Announces new purchase caps for GSEs
- Each GSE has \$100 billion capacity over 5 quarters
- No exclusions
- 37.5% must meet affordability constraints
- Capital Standards Rule



### OTHER KEY REGULATORY AND LEGISLATIVE ISSUES

- Fair Housing and Accessibility Reform
- Short-Term Rental and Legal Advocacy
- National Flood Insurance Program
- Data and Cyber security
- Energy Sustainability
- Davis Bacon Reform
- Section 8 Reform



#### BUILDING CODES



- NMHC successfully opposed onerous provisions to boost efficiency requirements for virtually all building envelope components without regard for realistic energy savings or payback.
- We also held back costly changes to day-to-day operational features and preserved the use of typical equipment like thermostats, water heaters and lighting.
- We continue to work on problematic proposals that fail to recognize individualized, locality-specific needs and capabilities related to renewable energy requirements and electric vehicle equipment – specifically through our Voter Guide.



#### THANK YOU

Douglas M. Bibby President National Multifamily Housing Council

Website: www.nmhc.org

E-mail: info@nmhc.org

Phone: 202/974-2300



20 20



### **GREG**WILLETT

Chief Economist

REALPAGE
2201 Lakeside Blvd
Richardson, TX 75082
972.820.3262
greg.willett@realpage.com



# 2020 U.S. Apartment Market Outlook **Greg Willett** Chief Economist, RealPage, Inc.

### Today's Results

Occupancy is at a near-record level.

Rent growth, while past the performance peak, remains healthy.



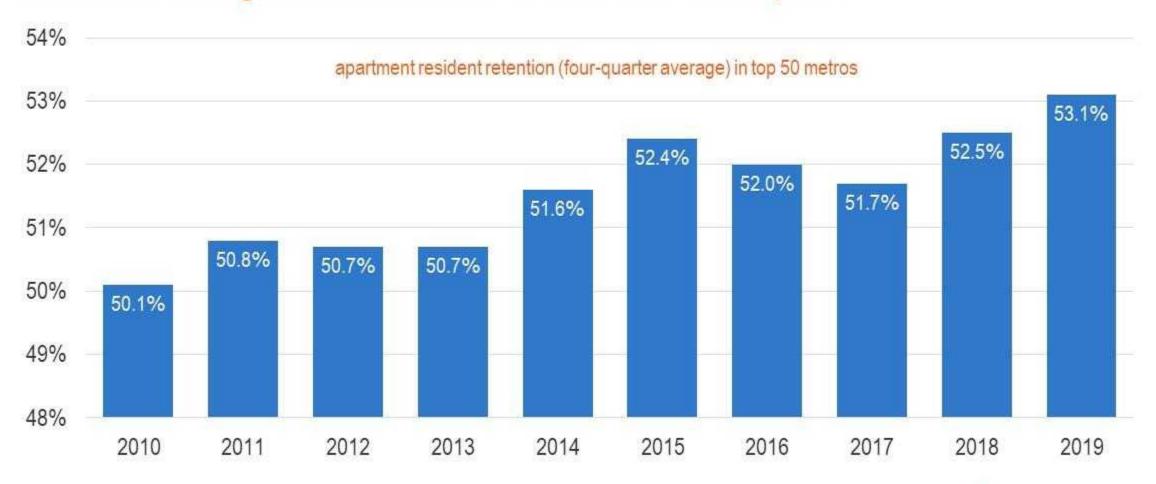
#### The U.S. apartment occupancy rate is about in line with the twodecade high







# Overall occupancy is helped by the improving ability to hang onto more existing renters when initial leases expire



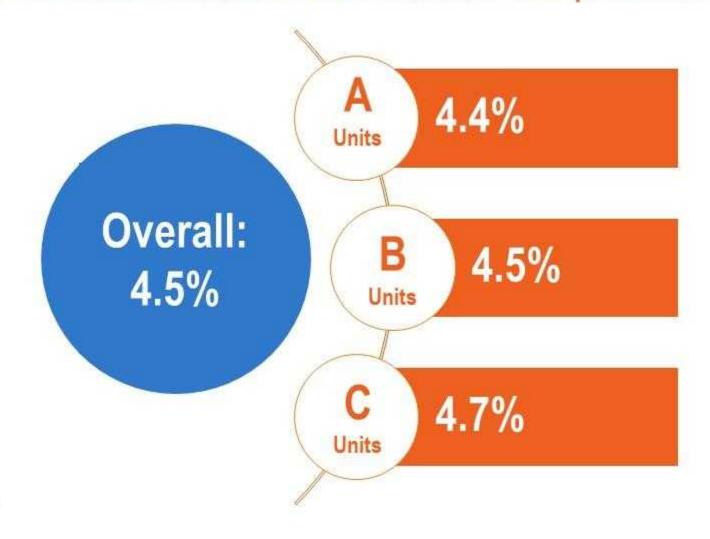


### Effective rents for new-resident leases continue to climb at a very solid clip





## Renewal-lease rent growth tops pricing power for new-resident leases ... and is substantial across the product spectrum





#### Investor appetite to deploy capital continues to be aggressive



Source: Real Capital Analytics



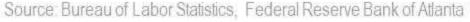
### The Near-Term Outlook

Expect competitive leasing conditions for luxury product, but the market's overall performance should remain solid.



# The low unemployment rate could begin to limit job additions ... while encouraging wage growth







# While demand could cool a bit in 2020, ongoing construction points to a continued high level of new supply







# Metros that have led for new supply during the current cycle tend to still have the most product on the way

Metro	Units Under Construction
Dallas-Fort Worth	43,998
Washington, DC	32,186
Los Angeles	26,087
Houston	24,493
Seattle	18,557
New York	18,343
Newark-Jersey City	17,554
Atlanta	17,105
Phoenix	15,276
Boston	15,239
Austin	14,589
Denver	14,110
Miami	13,767
Chicago	12,497
Charlotte	11,663





A product preclude pulling renters from the Class B stock to fill luxury supply



### U.S. apartment market expectations for 2020

95.2%

2.6%

average occupancy

average annual rent growth



#### **Expected Rent Growth Leaders in 2020**

Atlanta

Boston

Greensboro/Winston-Salem

Las Vegas

Nashville

Phoenix

Providence

Raleigh/Durham

Riverside

Seattle

Phoenix, Las Vegas and key Southeast metros appear likely to be 2020's stand-out performers





Watch to see if capital deployment shifts away from rent control states to Texas and the Southeast (especially the Carolinas and Tennessee).







20 20



#### GREG FAULKNER AIA, NCARB

President

HUMPHREYS & PARTNERS ARCHITECTS 5339 Alpha Road, Suite 300 Dallas, Texas 75240 972.701.9636 greg@humphreys.com

HUMPHREYS & PARTNERS ARCHITECTS,L.P.

NEW DESIGN & CONSTRUCTION COSTS

20 20

STATE OF THE INDUSTRY

- Conventional multifamily still strong nationally,
   some markets a little soft (conventional & student)
- Hard costs still high
- Entitlements/zoning taking too long
- Most deals still going ahead as far as funding and financing
- Student housing market is steady
- 3% rent growth, 97% occupancy year over year
- Bill Bayless "3rd/4th inning"

HPA'S PROJECT & OFFICE LOCATIONS



US OFFICES				
CHARLOTTE	HOUSTON	NEWPORT BEACH		
CHICAGO	LOS ANGELES	ORLANDO		
DALLAS (HQ)	NEW ORLEANS	SCOTTSDALE		
DENVER	NEW YORK			

CHENNAI	MEXICO CITY
HANOI	MONTEVIDEO
HO CHI MINH CITY	
LONDON	

INTERNATIONAL OFFICES

### **MARKET RATE**

**NEW & UPCOMING DESIGN** 





#### **TOWN TRELAGO**

BIG HOUSE®/BREEZEWAY

Maitland, FL

Stories: 2 & 3

Density: 20.72 du/ac







#### CREEKSIDE PARK

BIG HOUSE® & E-URBAN®
The Woodlands, TX
Stories: 2 & 4
Density: 20.31 du/ac
Units: 292







#### JEFFERSON LANDMARK

MARKET RATE
Farmers Branch, TX
Stories: 5

Density: 79.0 du/ac Units: 324





UNDER CONSTRUCTION

#### LUXE AT MILE HIGH

WRAP

Denver, CO

Stories: 5









#### FREMONT9

MIXED USE, PODIUM Las Vegas, NV Stories: 5

Density: 184 du/ac







#### ON THE BOARDS

550 27TH

MODULAR

Oakland, CA

Stories: 5

Density: 127 du/ac



#### THE LOCAL

MIXED-USE

Tempe, AZ

Stories: 8

Density: 85.27 du/ac





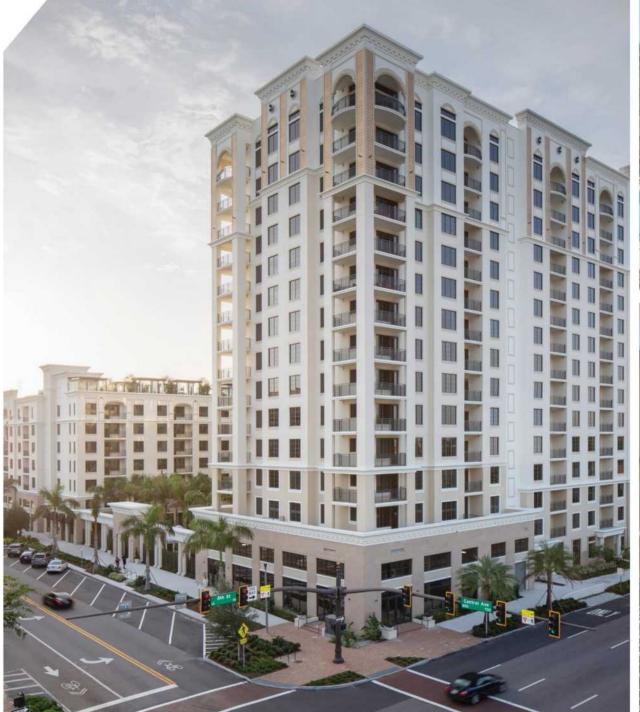


#### AWARD WINNER

#### ICON CENTRAL

HIGH RISE, MIXED-USE St. Petersburg, FL Stories: 15

Density: 148.7 du/ac







#### MULTI-AWARD WINNER

#### LVL29

HOME RISE®

Plano, TX

Stories: 29

Density: 155.60 du/ac



#### UNDER CONSTRUCTION

#### **OVATION AT RIVERWALK**

SENIOR LIVING Plainsboro Township, NJ

Stories: 5

Density: 10.13 du/ac







### STUDENT HOUSING

**NEW & UPCOMING DESIGN** 



#### PARK PLACE TEMPE

STUDENT HOUSING

Tempe, AZ

Stories: 5

Density: 169 b/ac

Beds: 782 (285units)





#### OCTAVE

STUDENT HOUSING Champaign, IL Stories: 7

Density: 114.46 b/ac Beds: 538 (167 units)











#### CITY CENTRE

STUDENT HOUSING
Ithaca, NY
Stories: 8

Density: 303.94 b/ac Beds: 231 (192 units)









#### THE DEGREE UNLV

STUDENT HOUSING, WRAP

Las Vegas

Stories: 5

Density: 139 b/ac Beds: 758 (226 units)





#### UNDER CONSTRUCTION

#### **TOWER 5040**

STUDENT HOUSING, PODIUM

Houston TX

Stories: 5

Density: 269.3 b/ac

Beds: 404 (147 units)



#### ON THE BOARDS

#### **ASPIRE SAN MARCOS**

MIXED-USE, STUDENT HOUSING

San Marcos, TX

Stories: 13

Density: 154 du/ac

Beds: 754 (225 units)



#### ON THE BOARDS

# THE STANDARD AT AUSTIN PHASE II

STUDENT HOUSING

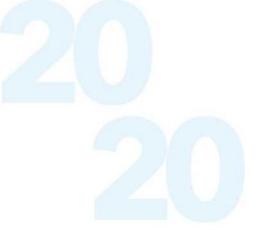
Austin, TX

Stories: 15

Density: 177 b/ac

Beds: 977 (279 units)







#### **RANDY STEPHENS**

214.340.9800 erstephens@svcc.biz

Garden	\$128-\$136
4-Story Wrap	\$150-\$165
5-Story Wrap	\$160-\$175
4-Story Podium	\$170-\$185
5-Story Podium	\$180-\$200+

Prices per NRSF



#### **KEVIN POWELL**

904.497.1500 kpowell@liveoakcontracting.com

Surface/Garden	\$125-135
3-story Surface/Garden	\$135-145 (NE only)
4-story E-Urban	\$140-150
4-story Wrap	\$160-165
5-story SOG	\$145-155 (No garage)

Prices per NRSF

#### HUMPHREYS & PARTNERS ARCHITECTS, L.P.

#### Garden Style/Surface Parked (18 to 24 du/ac)

\$125 - \$135

#### E-Urban®/Surface Parked (30 to 45 du/ac)

3-story \$130 - \$140

4-story elevatored \$140 - \$150

#### Wrap Garage (60 to 70 du/ac)

4-story elevatored \$165 - \$170

5-story elevatored \$175 - \$180

#### Podium Parked (120 to 140 du/ac)

4-story w elevator, 1-level podium \$175 - \$180

5-story w elevator, 1-level podium \$185 - \$195

#### High Rise (200-1000 du/ac)

\$265 - \$295

Prices per NRSF in Texas

# CONSTRUCTION COSTS

<sup>\* 7</sup> story light steel \$185 to \$215 range

<sup>\* 15%</sup> higher West (AZ, NV, UT)

<sup>\* 15%</sup> to 30% higher in California, Denver, Midwest, Northeast and Pacific Northwest

<sup>\*</sup> Student can be 5% higher w/ high mix of 4 bed/4 bath units



## WALTER HUGHES

Chief Innovation Officer

HUMPHREYS & PARTNERS ARCHITECTS 5339 Alpha Road, Suite 300 Dallas, Texas 75240 972.701.9636 walter@humphreys.com

HUMPHREYS & PARTNERS ARCHITECTS,L.P.

# SIGNATURE DESIGNS







BIG HOUSE®
1994
100% efficient

HOME RISE®
1999
87% efficient

E-URBAN®
2007
86% efficient

# THE BIG HOUSE®

FRESH LOOKS FOR THE NEW DECADE



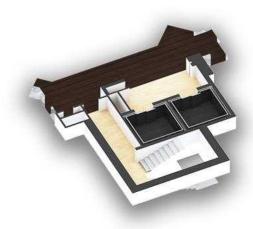




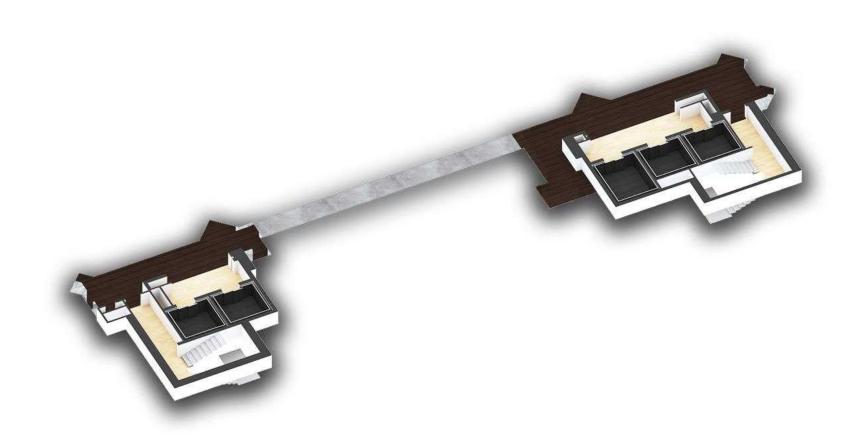


# THE HOME RISE®

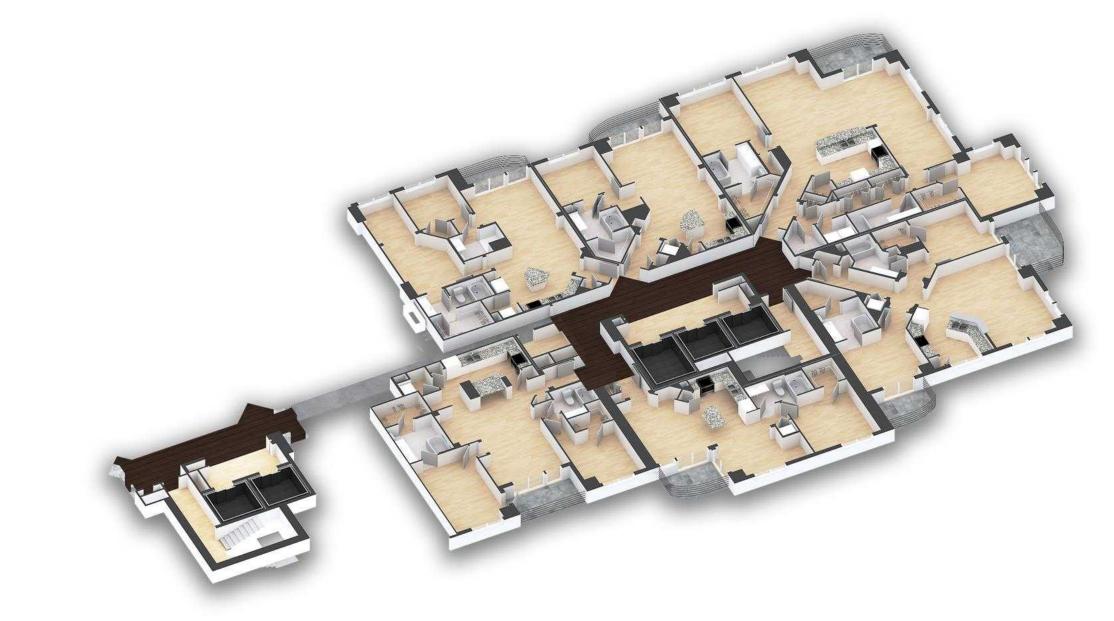
INNOVATIVE FLEXIBILITY

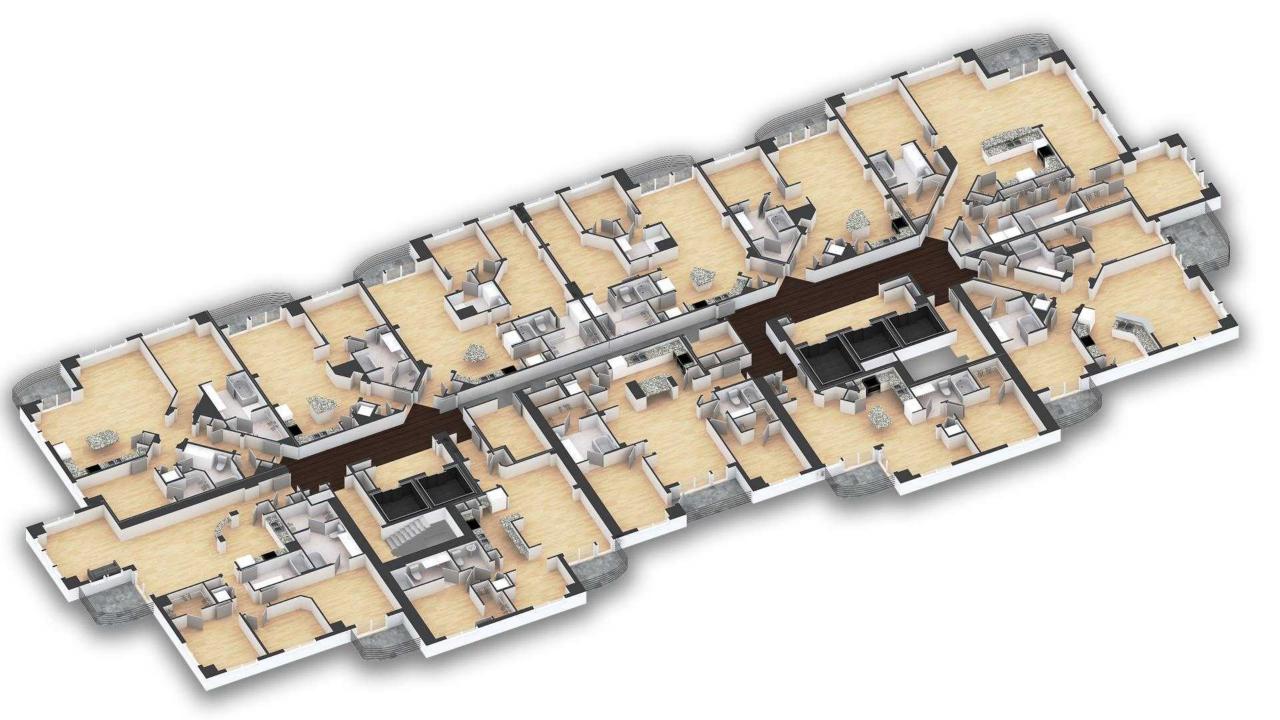


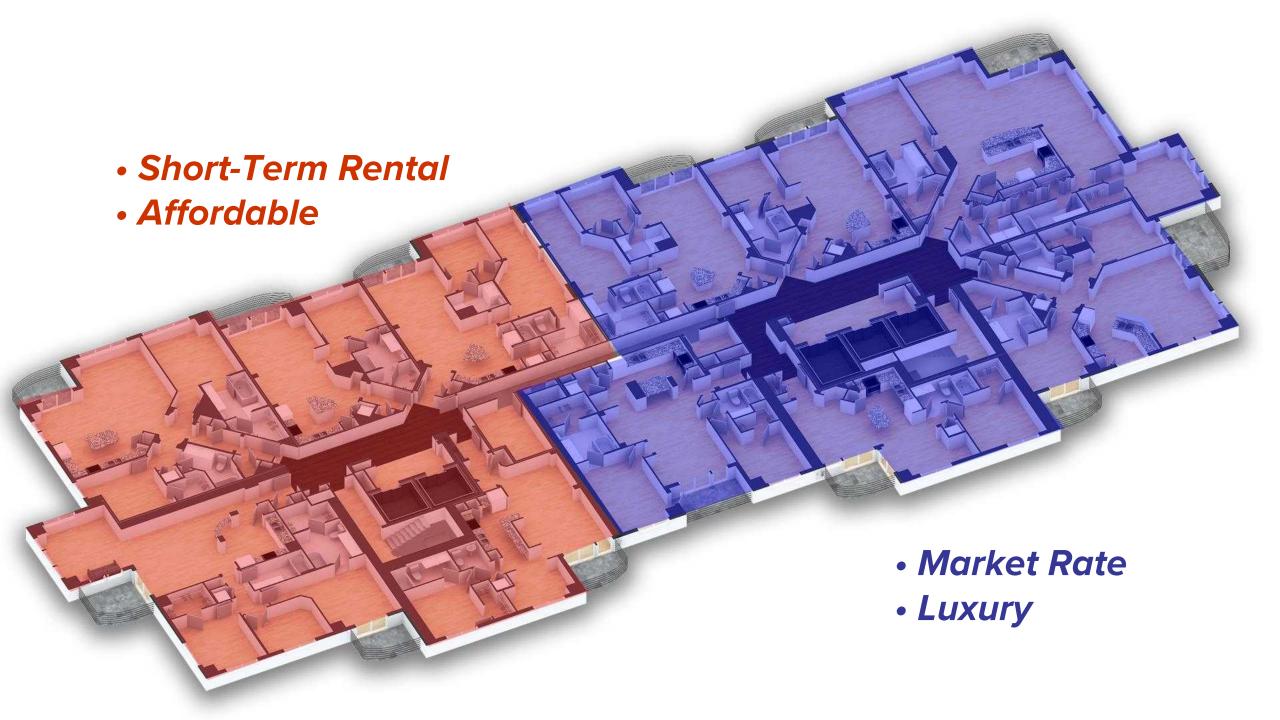












### THE STAK CONCEPTS

Efficiency, Density, Ease of Construction

E-STAKS®

**STAK HOUSE®** 

**STAK HOUSE MODULAR®** 

**STAK E-URBAN®** 

**STAK STUDENT®** 



**STAK FAMILY** 

### FOCUSED DESIGN

#### **EFFICIENCY**

Percentage proportion of a building's rentable area, not counting the area occupied by elevators, equipment, hallways, lobby, restrooms, etc.

• Rentable area x 100 / Total floor area

### **DENSITY**

Number of dwelling units per acre

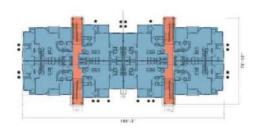
### **EASE OF CONSTRUCTION**

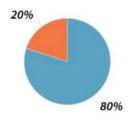
Simple to build and replicate

### **COMPARISON**

#### **BREEZEWAY**

2 and 3 story
Efficiency: 80%
Density: 2 story - 18 units/acre
3 story - 24 units/acre



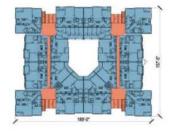


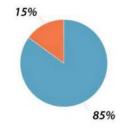
#### E-URBAN®

3, 4 and 5 story

Efficiency: 85%

Density: 3 story- 28-30 units/acre 4 story - 38-40 units/acre 5 story - 48-50 units/acre

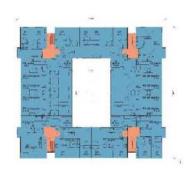


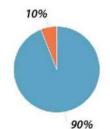


#### STAK E-URBAN®

Efficiency: 90%

Density: 4 story - 41 units/acre





### COMPARISON

#### E-STAKS®

Efficiency: 93%

Density: 3 story - up to 40 units/acre 4 story - up to 50 units/acre

#### STAK HOUSE®

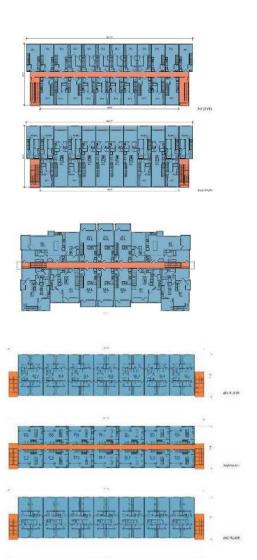
Efficiency: 93%

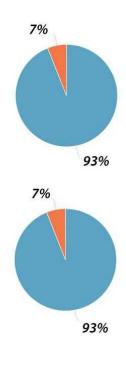
Density: 2/3 story - up to 26 units/acre

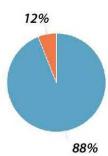
### STAK STUDENT®

Efficiency: 88%

Density: 4 story - 88 bed count/acre
5 story - 92 bed count/acre







### **EFFICIENCY COMPARISON**

Area that should be built in order to reach 200 units at 1000 sq ft average

BREEZEWAY

250,000 sq ft

E-URBAN®

235,000 sq ft

E-STAKS® & STAK HOUSE®

**215,000** sq ft

### **DENSITY COMPARISON**

Acreage that should be bought in order to build 200 units

**BREEZEWAY** 

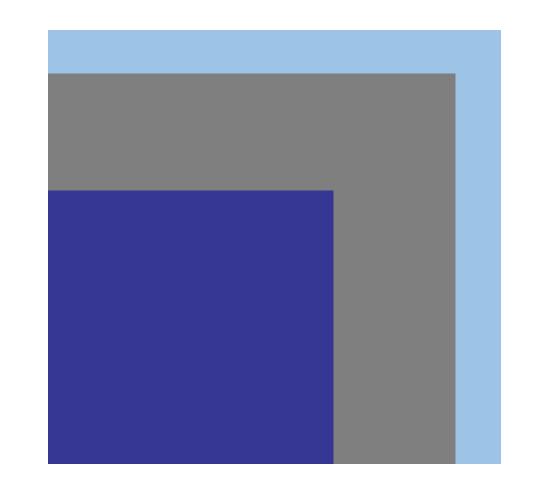
8.33 acres

E-URBAN®

7.10 acres

E-STAKS® & STAK HOUSE®

**5.00** acres



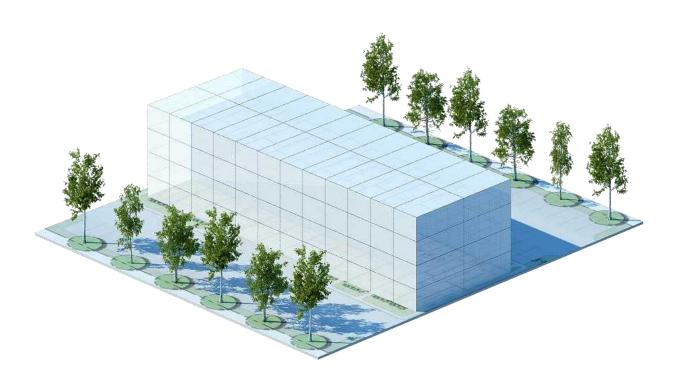
### E-STAKS®

- Nimble, efficient, high density
- One corridor serves three levels
- Variety of building shapes and lengths
- Customizable architectural facades
- All units are the same width & depth
- Interchangeable units
- Surface, podium or high Rise parking
- Estimated construction cost in

Texas: \$123-125 / sq ft



### E-STAKS® SITE PLAN



#### **3-STORY BUILDING**

Density Up to 40 units/acre

Efficiency 93%

Parking/unit 1.45

*Unit Avg. Sq Ft* 800 to 950

#### **4-STORY BUILDING**

Density Up to 50 units/acre

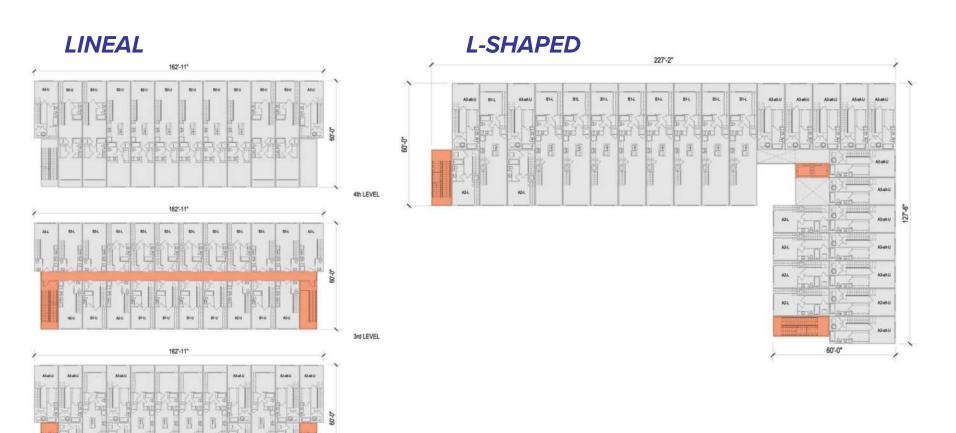
Efficiency 93%

Parking/unit 1.50

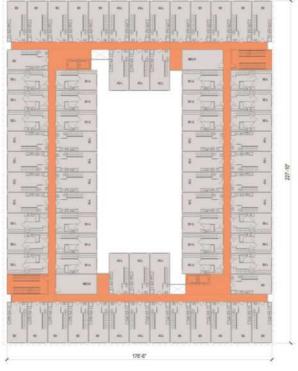
Unit Avg. Sq Ft 800 to 950

### E-STAKS®

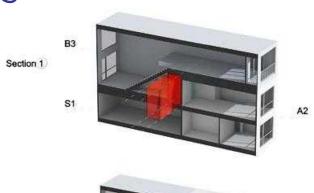
### **BUILDING SHAPE OPTIONS**



#### **DONUT**



### E-STAKS® STACKING PLANS

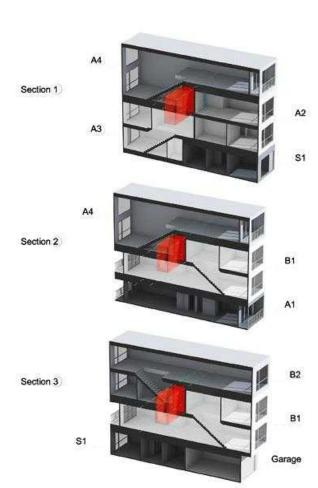


### 3-Story Building



Section 3 B3

4-Story Building







#### **UNIT A1**

1<sup>ST</sup> Level 702 SF Total Net 702 SF



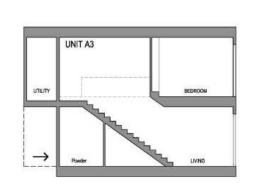


CROSS SECTION

BOTTOM FLOOR

#### **UNIT A3**

1<sup>ST</sup> Level 371 SF 2<sup>ND</sup> Level 383 SF Total Net 754 SF







**CROSS SECTION** 

TOP FLOOR

**BOTTOM FLOOR** 

### E-STAKS® UNIT PLANS

#### **UNIT B1**

1<sup>ST</sup> Level 701 SF 2<sup>ND</sup> Level 319 SF TOTAL NET 1020 SF



**CROSS SECTION** 

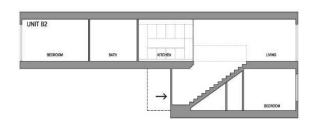


TOP FLOOR



#### **UNIT B2**

1<sup>ST</sup> Level 371 SF 2<sup>ND</sup> Level 764 SF TOTAL NET 1,135 SF







**CROSS SECTION** 

TOP FLOOR

### E-STAKS®





### E-STAKS®





# 20 STAKHOUSE®

- An efficient combo of our Big House<sup>®</sup> & E-Staks<sup>®</sup>
- Look of a Big House® with density of a 3-story product
- 2 & 3-story
- Variety of building shapes and lengths
- Customizable architectural facades
- Estimated construction cost in Texas: \$125 / sq ft





#### 2&3 - STORY BUILDING

Density 26 units/acre

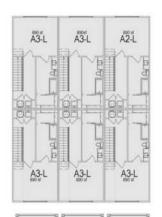
Efficiency 90%

*Unit Avg. Sq Ft* 850 to 1000

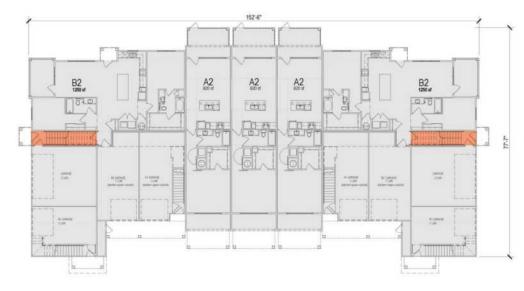


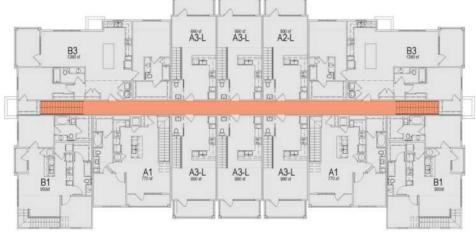
### STAK HOUSE®

**BUILDING PLAN** 



**THIRD FLOOR** 





**FIRST FLOOR** 

**SECOND FLOOR** 

### STAK HOUSE®





# \$\frac{1}{2}()\$ \$\frac{1}{2}()

## STAK HOUSE® MODULAR





All units based on 12' & 13'-6" Modules

### STAK E-URBAN®

- Third-level corridor serves all four levels
- Flat and stack units combined
- Efficiency up to 91%



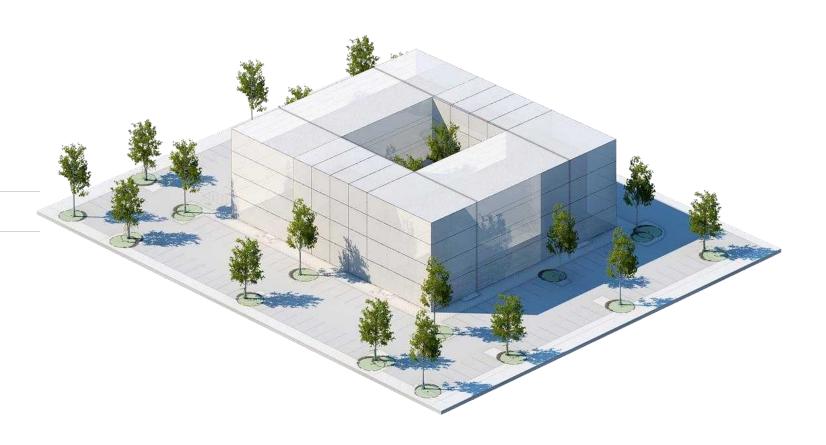
## STAKS E-URBAN® SITE PLAN

#### **4-STORY BUILDING**

Density 41 units/acre

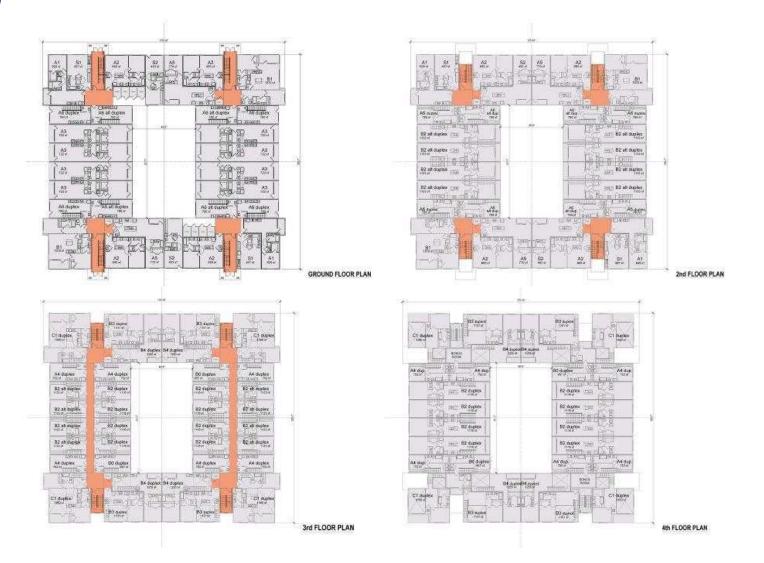
Efficiency 90%

Unit Avg. Sq Ft 870



### STAKS E-URBAN®

**BUILDING PLAN** 



## 20 STAKS E-URBAN®





## 20 STAKS E-URBAN®





### STAK STUDENT®

- Standardized modules
   (bedroom, bath + kitchen)
- Only 1 corridor to serve 4 to 5 levels
- Nimble, efficient, and high density



## STAK STUDENT® SITE PLAN

#### **4-STORY BUILDING**

Density	88 beds/acre
Efficiency	88%
Unit Avg. Sq Ft	850 to 1100

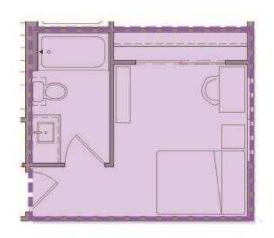
#### **5-STORY BUILDING**

Density	92 beds/acre		
Efficiency	88%		
Unit Avg. Sq Ft	1050 to 1300		



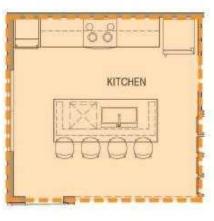
### STAK STUDENT®

SHARED ELEMENTS



01. BEDROOM & BATH









## 20 STAK STUDENT®







### CHELSEA DORA-SHIBLEY<sub>RID</sub>

VP of Interior Design

HPA DESIGN GROUP 5339 Alpha Road, Suite 250 Dallas, Texas 75240 972.596.1700 chelsea@hpadesigngroup.com







#### **FINALIST**

Best Mid-Rise Apt. Community (6-9 Stories) The Harrison - Glendale, CA



#### **FINALIST**

Affordable, Multifamily
The Cannery at Lewis Street - Gilroy, CA



#### SECOND PLACE

Commercial Single Space, Dedicated Function Echo Park at Perry Crossing - Plainfield, IN



#### **FIRST PLACE**

Sustainable Design Chroma - St. Louis, MO



#### **FIRST PLACE**

Historic Preservation/Renovation
The Douglas (now ReNew Wichita) - Witchita, KS







2019 HIGHLIGHTS
SIGNAGE & WAYFINDING
SERVICES



- Andrei Bucur, our new signage, branding, and environmental designer
- Streamline our interior services & aim to be a one-stop-shop for our clients
- Providing all facets of branding, environmental design, fabrication, manufacturing, and installation in-house.

NEW DESIGN & STYLE







JEFFERSON WOODLANDS GARLAND, TX

NEW DESIGN & STYLE

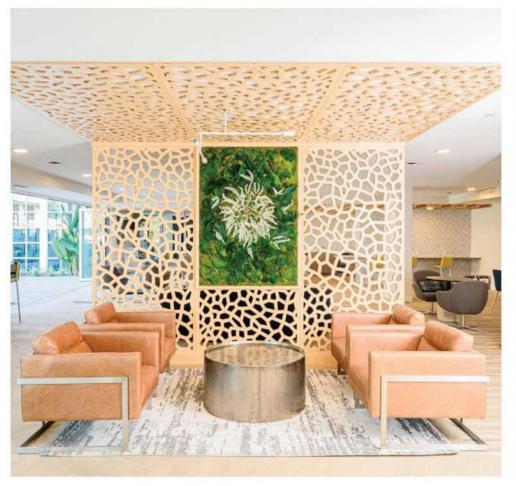






THE LYNDON AT SPRINGTOWN
SAN MARCOS, TX

NEW DESIGN & STYLE







THE CHARLIE SANTA ANA, CA

NEW DESIGN & STYLE







MAG & MAY FORT WORTH, TX

# COLORS OF THE YEAR

A DYNAMIC SHIFT FROM NEUTRALS TO SATURATED COLORS

# SHERWIN WILLIAMS.



# **PANTONE**



> COLORS OF













# GAME CHANGING TRENDS

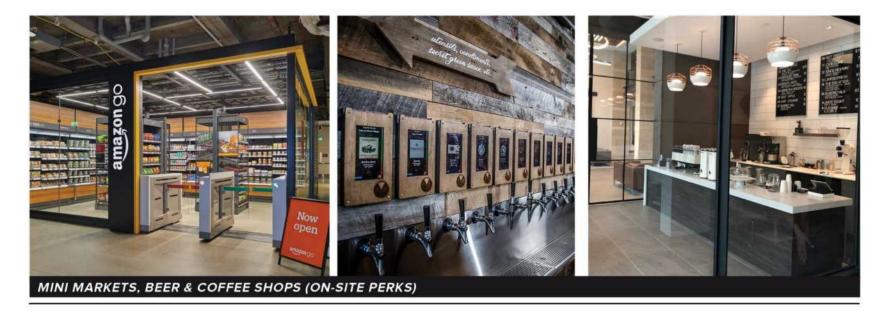
STAND OUT AGAINST THE COMPETITION





# GAME CHANGING TRENDS





> GAME CHANGING TRENDS





# GAME CHANGING TRENDS





ON THE BOARDS









MODA LUXE SALT LAKE CITY, UT

ON THE BOARDS









THE VIEW
CARROLLTON, TX

ON THE BOARDS









WEST VUE ORLANDO, FL

ON THE BOARDS









# RENAISSANCE AT SANTA ROSA

SANTA ROSA, CA

ON THE BOARDS









TOWER 5040 HOUSTON, TX

# THANK YOU!

# HPA DESIGN GROUP LEADERSHIP TEAM



VP, Interior Design
Dallas, TX



KAREN STILLWAGON Design Director, East Dallas, TX



LINDSEY NATION

Design Director, West

Costa Mesa, CA

# HARED SERVICES



Award-winning studio leading the industry in inventive interior multifamily design. With an ever expanding portfolio into Student Housing, Senior Living, High Rise and Hospitality and multiple office locations in **Dallas**, **Chicago**, **Costa Mesa**, and **Orlando**.



HPLA provides landscape architecture and site planning consulting services to the private and public sector specializing in the landscape architectural design for multifamily and mixed-use projects with two office locations in **Scottsdale** and **Dallas**.

# **\(\Delta\)** civil engineering

A full service firm with experience and proficiency in the Multi-Family, Single Family Subdivisions, Senior Living, Retail, Commercial, Office, Industrial and Healthcare industries.



GRS turns glass bottles and recycled porcelain fixtures into gorgeous slab material. Unique countertops, flooring, and wall applications are created from a variety of products for commercial and residential use.

# NMHC ANNUAL MEETING & APARTMENT STRATEGIES OUTLOOK CONFERENCE

JANUARY 21 – 23 ORLANDO, FL HILTON ORLANDO BONNET CREEK

**21** 

# NAHB INTERNATIONAL BUILDER'S SHOW (IBS)

JANUARY 21 – 23 LAS VEGAS, NV LAS VEGAS CONVENTION CENTER (LVCC)

**O7** 

### INTERFACE STUDENT HOUSING CONFERENCE

APRIL 07 - 09 AUSTIN, TX JW MARRIOTT AUSTIN

**17** 

# **ICSC RECon**

MAY 17 - 19 LAS VEGAS, NV LAS VEGAS CONVENTION CENTER (LVCC) **10** 

### PCBC CONFERENCE AND EXHIBIT HALL

JUNE 10 – 11 SAN FRANCISCO MOSCONE CENTER SOUTH

30

### MULTIFAMILY EXECUTIVE CONFERENCE

SEPTEMBER 30 – OCTOBER 02 LAS VEGAS, NV BELLAGIO RESORT & CASINO

**06** 

## NMHC STUDENT HOUSING CONFERENCE

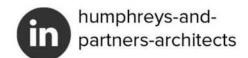
OCTOBER 06 - 08 MIAMI, FL LOEWS MIAMI BEACH





# STAY CONNECTED WITH US









# **DOUG BIBBY**

President

**NMHC** 1775 Eye Street, N.W., Suite 1100 Washington, D.C. 20006 202-974-2300 dbibby@nmhc.org





# WALTER HUGHES AIA Chief Innovation Officer

**HUMPHREYS & PARTNERS ARCHITECTS** 5339 Alpha Road, Suite 300 Dallas, Texas 75240 972.701.9636 walter@humphreys.com



REAL PAGE 2201 Lakeside Blvd Richardson, TX 75082 972.820.3262 greg.willett@realpage.com





CHELSEA DORA-SHIBLEYRID

VP, Interior Design

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