

# PROSPECTUS

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## Real Estate Fundamentals

Interactive one-day course for sustainability  
and ESG professionals



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# INTRODUCTION

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It is now increasingly common for property organisations across the real estate value chain to employ sustainability and ESG professionals to lead, manage and support their responsible investment, sustainability and impact activities. Very often, these professionals are expert in environmental and/or socio-economic matters but have limited experience in, or knowledge of, key commercial property disciplines, concepts and terminology.

By assisting sustainability and ESG professionals working within a property context to better understand the fundamentals of real estate markets and related disciplines, our aim with this highly-interactive and intensive one-day course is to enhance their ability to:

- engage confidently with their colleagues and stakeholders in the furtherance of positive sustainability and ESG outcomes; and
- enhance their contribution to the strategic, operational and/or financial goals of their employer organisations and/or their partner organisations.



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# OBJECTIVES

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Participants can expect to develop:

- 1 A stronger appreciation of the commercial property market, including present and future challenges.
- 2 A better understanding of core property investment and development processes.
- 3 A working knowledge of valuations and appraisal methods for property investment and development schemes and how sustainability factors interact with these.
- 4 Deeper insights about the work undertaken by different professionals within the sector, including the notable standards by which they are governed (e.g. valuers, investment managers).
- 5 Familiarity with, and understanding of, property jargon.
- 6 The knowledge with which to connect ESG objectives and principles to 'traditional' commercial property drivers.

The unique course, specifically tailored for real estate sustainability and ESG professionals, will be run in a roundtable format with a combination of classroom-style teaching, Q&A, individual and group exercises and facilitated discussions. In this way, it is hoped that all participants will learn by having the opportunity to steer content whilst interacting with each other and the facilitators.



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# AGENDA

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The course includes the following elements:

- Examining the state and function of the real estate market, including how it compares to other asset classes, its current and future challenges, and salient market trends
- Following the money: the property investment process, who the market participants are, what their roles and objectives might be and how that can shape their strategy and approach, including in relation to ESG
- Understanding property value, valuations and the role of the valuer, how investment appraisals work and their interface with sustainability factors
- Identifying the objectives, obligations and rights of landlords and occupiers and how this can impact on sustainability risks and opportunities
- Changing skylines: the property development process, including the scope of development, who does what for whom and why, how development appraisals are undertaken, and the impact of sustainability factors
- Considering throughout the language used by real estate market participants and what this can mean



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# DETAILS

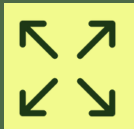
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**Course Length**  
One Day, 3rd October 2023



**Location**  
UK Green Building Council,  
The Building Centre, 26 Store Street, London WC1E 7BT



**Capacity**  
Capped at 15 Participants



**Eligibility**  
Exclusive to ESG and sustainability professionals working in real estate



**Learning Materials**  
All course resources provided via the online Hillbreak Learning Hub



**Refreshments:**  
Provided (including lunch)



**Cost**  
£600 per person



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# BIOGRAPHIES

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## ■ Jon Lovell – Lead Facilitator

Jon is Managing Director of Hillbreak. He has extensive international experience of advising and teaching on real estate and sustainability matters, and is a prominent thought-leader within the industry. Before co-founding Hillbreak in 2015, he was the global Real Estate Sustainability lead at Deloitte and prior to that Head of Sustainability at property firm, Drivers Jonas. His clients include real estate investors, investment and asset managers, property companies and property advisory firms.

## ■ Sophie Carruth

Sophie joined Hillbreak at the start of 2022 as Principal – Client Learning. She was previously Head of Sustainability at LaSalle Investment Management where she spent 16 years. She has spent her career at the crossroads of real estate and ESG, having started out as an asset manager. She is a Member of the RICS.

## ■ Edwin Bray

Edwin is a commercial real estate consultant. He recently retired from Deloitte where he was a Partner for 12 years having previously been a Partner with Drivers Jonas. He specialised in real estate valuation, assurance and due diligence, working with a broad range of clients across the public and private sectors.



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# TESTIMONIALS

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“

Thank you so much to the Hillbreak team for an EXCELLENT course today. I learnt so much. Thank you for all your patience with our questions.

“

It was a really valuable session, with some excellent content and delivered in such an engaging way!

“

Just a quick note to say thanks for the brilliant training yesterday. Thought you did really well to keep it lively and engaging, which is not easy in a virtual environment, particularly for a lengthy period of time.

“

Thank you again for a really great training session. I feel much better equipped to have productive conversations with asset managers and development teams and understanding the calculations behind the yield and hurdle rates was particularly useful.

“

It was a really interesting day and joined up (fairly sizeable) missing links for me.



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