



NATIONAL  
ASSOCIATION *of*  
REALTORS®

## Commercial Innovation Grant Executive Summary

Innovation Name: Annual Conference CEU Tracking  
Association Name: Indiana Commercial Board of REALTORS® (ICBR)  
Contact Person: Lindsey Knight  
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1. Project Summary (purpose and concept)  
The purpose of our project was to create a more accurate and streamlined process to track attendee CEU credits for our annual education conference. The product we used allowed us to electronically track each attendee and which sessions they attended, when they entered/exited a room, and most importantly we could then determine whether or not they received CEU credits based on the amount of time they were in each session.
2. Project Financials  
The total cost for the project, including staff time, was \$4,000. We were able to reduce that to \$500, with a small in-kind donation from FlowStats, the company providing the service, and the innovative grant funds received from NAR.
3. Performance Measures & Benchmarks  
In order to ensure the success of this venture, we had to work closely with FlowStats to ensure the accuracy of the records and tracking for each room. We first had to adhere to electronic tracking mechanisms on each attendee's name badge; each attendee then had an arbitrarily assigned registration number, and the tracker and number were the correlation in the system. For example, if Joe Smith has the registration #1, he is assigned that number in the tracking system. Therefore everyone #1 was tracked throughout the conference we knew that was Joe Smith.
4. Project Timeline (how long did it take)  
The planning of the project was definitely the most intense part of the project timeline. We toured the conference site several times with FlowStats in order to set up the proper entrance/exit for each of the CEU sessions. Once that portion was done the rest was really just the logistics of the system and the registrants themselves. The tracking was complete in real time, however FlowStats then had to review all of the tracking results to eliminate any false reads, i.e. if Joe Smith walked into Room A to look for another attendee, or Joe Smith walks too close to the Room A tracker but never actually entered the room. It took FlowStats approximately 4-business days to filter through all of the data in order to provide me with the final results, this was for 353-attendees. I was then able to produce a certificate that was sent via email (attached).



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### 5. Project Management

All listed above through the project timeline.

### 6. Lessons Learned/Outcomes

Prior to using this system attendees were required to sign in with pen/paper for each session and at the conclusion of the session were handed a paper CEU certificate they were required to keep on file for 2-4 years. This created several issues for attendees/staff:

1. No timing on the tracking to know the actual time attendee spent in session
2. If/When attendees lose certificates we would have to scroll through pages and pages of sign in sheets to verify attendance
3. If an attendee claimed they attended a session but failed to sign-in we had no way to verify they actually attended.

This new system allowed us the opportunity to be accurate in our tracking:

1. We knew exactly when attendees entered/exited sessions
2. If anyone questioned their CEU hours post-conference I had the backup at hand that was in a searchable document.
3. Eliminated the need for paper sign-in sheets and certificates

If I am able to afford to use this tracking system in the future, I would not do anything different in terms of how the system worked and how we provided the certificates post-conference. However, I would have collected more information on the attendees, i.e. designations, area(s) of practice, district of residence, date of birth, license #, etc. Because the data is sortable and searchable, this would allow me to know the demographics on those who attended certain sessions. That information is priceless when it comes to future education planning.

I would absolutely recommend this system to any other Board for their CEU tracking. Using this system was a game changer for our organization and our attendees. Anyone else who implements this would absolutely agree.

### 7. Supporting Documents

Please find a sample CEU certificate attached. These were emailed to attendees one-week after the event.

*In case of questions, contact: Melanie Sligh [msligh@realtors.org](mailto:msligh@realtors.org) or 312-329-8282*



**CERTIFICATE OF CONTINUING  
EDUCATION for  
Craig Anderson, Duke Realty**

Indiana Commercial Real Estate Conference  
Friday, June 14, 2013  
JW Marriott  
Indianapolis, Indiana

*THIS IS YOUR OFFICIAL CEU CERTIFICATE. Per Indiana License Law Title 876, Article 4: It is the responsibility of each licensee to retain education course(s) attendance verification to support the education course(s) taken by the licensee for four (4) years after the end of the biennial period for which the continuing education is claimed.*

<u>Session Time:</u>	<u>Session Title:</u>	<u>CEUs Earned:</u>
7:30 – 9:15am	Changing Gears! Breakfast Keynote	2 Elective Hours
9:30 – 11:15am	Anti-Trust Basics	0 Mandatory Hours
	Commercial Legislation	2 Elective Hours
	Commercial Financing	0 Elective Hours
1:00 – 2:45pm	License Law	2 Mandatory Hours
	Commercial Appraisal Panel	0 Elective Hours
	Commercial Leases and Avoiding Litigation	0 Elective Hours
3:00 – 4:45pm	Agency Law	0 Mandatory Hours
	Retail Feasibility Analysis	2 Elective Hours
	LEDO Panel	0 Elective Hours

**Craig Anderson 2013 Conference CEU Summary**

**2 Mandatory Hours**

**6 Elective Hours**

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*Per Indiana License Law Title 876, Article 4: It is the responsibility of each licensee to retain education course(s) attendance verification to support the education course(s) taken by the licensee for four (4) years after the end of the biennial period for which the continuing education is claimed. In other words, KEEP THIS EMAIL!*