

National Association of REALTORS®
2014 NAR Commercial Innovation Grant
Executive Summary

Innovation Name: 2014 C&I Regional Conference
Association Name: Lancaster County Association of Realtors
Contact Person: Gwenae Wachter

1. Project Summary (purpose and concept)
 - a. Statement of purpose: Once every four years, the Lancaster C&I Council hosts a Regional Conference.
 - b. Original Goals: To provide commercial members in the region with educational and networking opportunities.
 - c. Objectives: Book a national speaker to further enhance the format of our long-standing event.
 - d. Success criteria: Educating attendees to grow their business through smarter, current and relevant practices by reaching diverse market segments and customers they never had before. Networking opportunities develop new and expanded relationships beyond the event.

2. Project Financials
 - a. Project Budget Overview: See Attachment
 - b. Income (fees, grant, etc): See Attachment
 - c. Expenses (how was money spent?): Majority of fees were associated with the Lancaster Marriott for meals and audio visual equipment, plus speaker fees.

3. Performance Measures & Benchmarks (i.e. how many attended your event, how many used your product or outcomes from your meeting)
 - a. To what level of success was achieved?
Attendance Goal: 125-200; Actual 145
Sponsorship & Advertising Goal: \$10,000; Actual \$15,270

4. Project Timeline (how long did it take): See Attachment.

5. Project Management

- a. Marketing Strategy: Electronically targeted 915 commercial members from South Central PA—Lancaster, Lebanon, RAYAC, GHAR, Suburban West, Reading/Berks.
- b. Planning Meetings: Task Force met eight times to develop program, schedule events and develop detailed plans plus volunteer to conduct sponsorship solicitation follow-up calls.
- c. Day-to-Day Project Management: Handled by two full-time association staff members.

6. Lessons Learned/Outcomes

- a. Who Benefitted From Your Project? Realtor & affiliate attendees from South Central PA.
- b. Project Highlights: Fantastic reaction to Kelly McDonald, our national speaker. Greater number of companies opted to be a sponsor of the event than anticipated. The sponsorship included ad and event tickets; therefore, our number of projected paying attendees was less, but by putting together the sponsor comps and paying attendees, we hit within the range of anticipated conference goers.
- c. Project Best Practices: Task Force of C&I Realtor and Affiliate members to plan and promote the event; active promotion at all monthly membership meetings; we traded a sponsorship for the printing of the booklet attendees received the day of the event.
- d. What processes worked well: Doing all electronic promotion and registration versus snail mail; utilizing You Tube video, Constant Contact and emailing PDFs for event promotion. The PowerPoint presentations of our three speakers were posted on the Council's website immediately following the event.
- e. What could have been improved, and how? Greater attendance from areas surrounding Lancaster County and a better job of convincing local affiliates it was a program for all members, not just Realtors.
- f. Advice/Comments for Implementing in Another Association: In earlier years, this event was virtually a full-day event with three breakout sessions where attendees selected between three seminars each time. To find interesting topics and speakers for nine total seminars is daunting. Our revised format of less than a

full-day allows attendees to still be able to go to the office for a few hours. Utilizing three speakers that all attendees hear allows us to focus on finding three really dynamic topics / speakers and increases the camaraderie / networking features of the day by keeping everyone together throughout the entire event. It also greatly diminishes staff stress, AV expenses, facility logistics and attendee confusion on where to be and when.

Allow a year or more of planning in order to assure facility's availability, time to coordinate speakers' schedules and time to solicit sponsors and advertisers.

Sponsorship packages were a big success—either option of conference level (\$1,500) or the breakfast / luncheon level (\$600) included sponsor recognition, ad and comp event tickets.

The presence of a national speaker of Kelly McDonald's caliber heightened the professionalism of the event; and various attendees responded that it was one of the best conferences they have attended with very current, relevant and helpful information.

7. Supporting Documents: See Attachments.

C&I Real Estate Regional Conference
Lancaster County Convention Center • May 7, 2014

• Budget •

	<u>Actual</u>	<i>Prospective Number of Attendees & Originally Budgeted Income/Expenses</i>		
		<u>125</u>	<u>150</u>	<u>175</u>
Income				
NAR Grant	3,000.00			
Program Ads	2,370.00	4,000.00	4,000.00	4,000.00
Registrations	6,660.00	8,125.00	9,750.00	11,375.00
Sponsors	12,900.00	6,000.00	6,000.00	6,000.00
<i>Total Income</i>	\$ 24,930.00	18,125.00	19,750.00	21,375.00
Expenses				
Audio Visual	1,485.25	500.00	500.00	500.00
Breakfast	1,577.90	2,056.00	2,468.00	2,879.00
IT Support—Central Penn Networking	1,215.00			
Lunch	2,451.08	3,096.00	3,716.00	4,335.00
Meals—Speakers	99.85	150.00	150.00	150.00
Meals—Sponsor Comps	1,872.90	825.00	825.00	825.00
Meeting Room Rental	128.26	100.00	100.00	100.00
Printed Materials	-	1,000.00	1,000.00	1,000.00
Signage	208.37	100.00	100.00	100.00
Speaker Expenses	10,500.00	11,200.00	11,200.00	11,200.00
Staff Time (Hourly rate of \$50)	6,500.00	5,000.00	5,000.00	5,000.00
Thank You Gift—Danielle DeGroft	50.00	50.00	50.00	50.00
<i>Total Expenses</i>	\$ 26,088.61	24,077.00	25,109.00	26,139.00
(Deficit)	\$ (1,158.61)	(5,952.00)	(5,359.00)	(4,764.00)

C&I Regional Conference

Sponsor Recognition



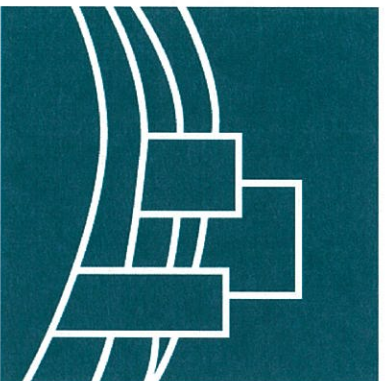
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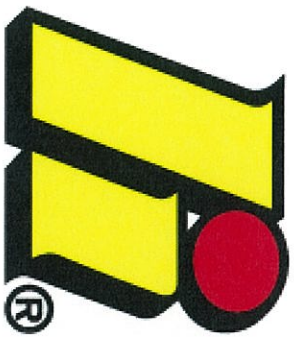
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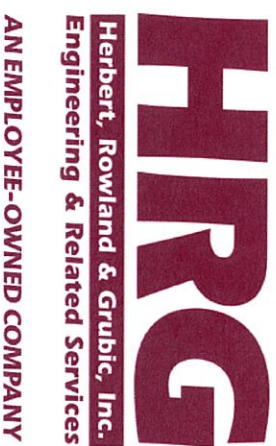


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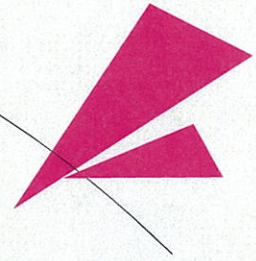




Thanks

To all of our sponsors
and attendees today!

C&I Regional Conference
May 7, 2014 • Lancaster Convention Center



Keynote Speaker Kelly McDonald

"How to Market to People Not Like You in Today's Changing Marketplace"

If you could grow your business simply by marketing to your existing customers, making money would be a cakewalk. But to generate new revenue, you have to win over the customers you're not getting. The 2010 Census reveals that one in three Americans is not white. Now, more than ever, it's important to reach diverse market segments to grow your business.

Diversity marketing is the new norm, and this doesn't simply mean racial diversity. Diversity comes in many forms—gender, race, age, lifestage, language preference, politics, religion, sexuality and hobbies or special interests are all ways in which people's differences are recognized. By understanding these differences and tailoring your product, message or marketing efforts to reflect consumers' values, you are validating the importance of a consumer group. It's about marketing to values, not demographic profiles. Through this keynote address, learn how to create a deep, emotional connection between your products or service and new consumers.

You'll learn:

- The do's and don'ts of marketing to women, immigrants, Hispanics, African Americans, Asians, gays and lesbians and different generations
- How to tweak your product or service to be relevant to a new customer group
- How to communicate in a relevant manner by showing respect for others' cultures, values, language and priorities
- How to create messaging that resonates with each generation's unique values
- How to make your business or product operationally ready and operationally friendly, meaning that you can make a customer feel comfortable throughout a transaction.

Why do you need to attend this seminar? The world is more diverse than ever before. For the first time in the U.S., one in three Americans is not white. Every brand, company and product is scrambling to learn how to tap into new and diverse market segments to grow business. You will learn exactly how to cultivate new and diverse customer segments with confidence. Do's and don'ts are covered in detail. Dozens of real life, real world examples—good and bad—are shared so that you better understand how others have done this successfully.



Kelly McDonald is president of McDonald Marketing, named one of the top ad agencies in the U.S. by Advertising Age. Despite her blond hair and blue eyes, Kelly is an expert in multicultural marketing and marketing to consumer values. She has been featured on CNBC, in Fast Company, Business Week, on CNNMoney.com and on Sirius/XM Radio. Her book, "How to Market to People Not Like You" was #7 on the list of business book bestsellers for 2011 and was called a "must read" by Forbes.

Hosted by the Lancaster County Association of Realtors® Commercial & Industrial Council

**Central Pennsylvania
C&I Regional Conference**
May 7, 2014 • Lancaster County Convention Center

LANCASTER City



Diversity & Its Impact on Commercial Real Estate

Conference Sponsors:



Breakfast & Luncheon Sponsors:

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Hosted by the Lancaster County Association of Realtors® Commercial & Industrial Real Estate Council

Central Pennsylvania
C&I Regional Conference

May 7, 2014

Lancaster County Convention Center • Lancaster, PA

Schedule of Events

8:00 a.m. Registration & Breakfast Buffet

9:10 a.m. Opening Remarks by
C&I President & Sponsor Recognition

9:15 a.m. Presentation by Geoff Davis
The Heart of Leadership

10:00 - 10:30 a.m. Networking Break

10:30 - 11:30 a.m.
Presentation by Dr. Lawrence Yun
Commercial Real Estate Market Forecast

11:30 - 11:45 a.m. Networking Break

11:45 a.m. - 1:30 p.m. . . Lunch & Presentation by
Kelly McDonald, *"How to Market to People
Not Like You in Today's Changing Marketplace"*

1:30 p.m. Closing Remarks

**Recognizing Changing Markets ...
Demographic, Economic & Diversity**



**Geoff Davis
Presentation:**

***"The Heart
of Leadership"***

Presentation Synopsis

Business leader and thought leader Bob Dunham has defined leadership as "the art of making declarations that other people commit to".

How is leadership an art? What does it take to make powerful declarations? How do we get people to commit and follow our lead?

Discover some of the most basic elements of effective leadership that are often overlooked in today's organizations and how understanding people in a different way creates dramatically different results for organizations.

Geoff Davis uses his unique gifts and broad array of experiences to help others more fully realize the infinite possibilities, incredible fullness and often overlooked richness of their own lives. As a Professional Certified Coach, Geoff serves business, non-profit, academic leaders and other coaches in coaching relationships. His ongoing commitment to learning continues to enrich the end result of serving others.

A Lancaster native, Geoff holds a bachelor's and master's degrees as well as a supervisory degree from Millersville University of Pennsylvania and has participated in executive education courses at the Wharton School of the University of Pennsylvania.

Dr. Lawrence Yun
Presentation:

"Commercial Real Estate Market Outlook"



Presentation Synopsis

- Consumer and business spending in current recovery
- Government spending and deficit impact
- Inflation and monetary policy
- Commercial real estate business activity
- Methods of finance
- Apartment—net absorption, new completions, vacancy, rent growth
- Industrial—net absorption, new completions, vacancy, rent growth
- Retail—net absorption, new completions, vacancy, rent growth
- Office—net absorption, new completions, vacancy, rent growth
- Forecast and risks to the forecast

Lawrence Yun is Chief Economist and Senior Vice President of Research at the National Association of Realtors® and has been with the Association since 2000. He directs research activity for the Association and regularly provides commentary on real estate market trends for its 1 million Realtor® members. Dr. Yun creates NAR's forecasts and participates in many economic forecasting panels, including Blue Chip and the Harvard University Industrial Economist Council. He appears regularly on financial news outlets, is a frequent speaker at real estate conferences throughout the U.S. and has testified before Congress. *USA Today* in 2008 listed him among the top 10 economic forecasters in the country, and he has been named among the 100 Most Influential Real Estate Leaders by INMAN News.

Dr. Yun received his undergraduate degree from Purdue University and earned his Ph.D. from the University of Maryland at College Park.

Kelly McDonald
Presentation:

"How to Market to People Not Like You in Today's Changing Marketplace"



Presentation Synopsis

The world is more diverse than ever before . . . for the first time in the U.S., one in three Americans is not White. Learn how to tap into new and diverse market segments to grow business.

- Learn the do's and don'ts of marketing to women, immigrants, Hispanics, African Americans, Asians, gays and lesbians and different generations
- Discover how to tweak your product or service to be relevant to a new customer group
- Find out how to communicate in a relevant manner by showing respect for others' cultures, values, language and priorities
- Learn how to make a customer feel comfortable throughout a transaction

Kelly McDonald is a marketing and advertising expert and considered one of the nation's top experts in multicultural marketing and consumer trends. Her client experience includes brands such as Toyota, Kimberly-Clark, Nike, Harley-Davidson, Miller-Coors and Sherwin-Williams.

Kelly was named #1 on the list of "26 Hot Speakers" by *Successful Meetings Magazine*. *Advertising Age* has twice named her company one of the top ad agencies in the U.S. She has been featured on CNBC, in *Forbes*, *Bloomberg Business Week*, *Fast Company*, *CNNMoney.com* and on *Sirius/XM Radio*. She is also the author of two books.

Attendees will receive a complimentary copy of Kelly's latest cook "Crafting the Customer Experience for People Not Like You".

Registration Form

- Early Bird Registration** — by March 25th
A check for the \$60 per person registration fee made payable to LCAR is enclosed (includes all educational sessions, breakfast & lunch)

- Registration Fee** — after March 25th
A check for the \$75 per person registration fee made payable to LCAR is enclosed (includes all educational sessions, breakfast & lunch)

Name: _____

Company: _____

Address: _____

City: _____

State: _____ Zip: _____

Phone: _____

Fax: _____

E-Mail: _____

Breakfast/Luncheon Reservation

(Included in Registration Fee)

- I plan to attend both the breakfast & luncheon.
- I will attend only the breakfast.
- I will attend only the luncheon.
- I will not be attending either breakfast or lunch.

Breakfast Buffet:

Continental Collage—selection of chilled juices; sliced seasonal fresh fruit; assorted danishes, croissants and muffins; butter and preserves; coffee, decaffeinated coffee and selection of herbal teas.

Luncheon:

Chef's house salad; assorted bread basket; chicken au poivre; wild rice; green beans; chef's choice of dessert; freshly brewed coffee, decaffeinated coffee and tea selection; iced tea.

REGISTRATION DEADLINE: APRIL 25, 2014

LCAR • 1930 Harrington Drive • Lancaster, PA 17601
(717) 569-4625 • Fax (717) 569-5994

Conference Sponsors



Breakfast & Luncheon Sponsors

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The Law Firm of Barley Snyder

Meedcor Development Co. / Reese Samley
Wagenseller Mecum & Longer, PC

NAI Commercial Partners, Inc.

National Penn Bank

Nikolaus & Hohenadel

Union Community Bank

Wohlsen Construction

Conference Location

**Lancaster County Convention Center
25 South Queen Street • Lancaster, PA**

From Route 30, take the Fruitville Pike exit and follow directions for "Historic Lancaster". Fruitville Pike will become N. Prince Street. Proceed south on N. Prince Street to King Street. Left onto King. Penn Square will be one block to your right at the next traffic light. Bear right for parking entrance.

The C&I Regional Real Estate Conference

Hosted by the C&I Council of the
Lancaster County Association of Realtors®

Lancaster County Convention Center
Lancaster, PA • May 7, 2014



SPONSORSHIP COMMITMENT

Company or Individual: _____

Contact Person: _____ Title: _____

Address: _____

Phone: _____ Fax: _____ E-mail: _____

I/We wish to demonstrate support of the C&I Regional Real Estate Conference as follows:

- Conference Sponsors*** \$1,500
Includes acknowledgment on the cover of registration brochure and conference program; full page, four-color ad in program; banner at event; exhibit table; five complimentary event registrations
- Breakfast & Luncheon Sponsors*** \$ 600
Includes appropriate signage at both breakfast and lunch; half page, black and white ad in the program; exhibit table; two complimentary event registrations

**Please note that sponsorship assignments will be based upon the receipt order of this commitment form and payment. The deadline is February 7th.*

Program Ads (Note: ads must be camera ready)

- Full page**, black & white (5" wide x 8" high) \$ 200
- Half page**, black & white (5" wide x 4" high) \$ 100
- Quarter page/Business card**,
black & white (3 1/2" wide x 2" high) \$ 60

Deadline: March 7th

Checks should be made payable to the Lancaster County Association of Realtors®
and returned with this form to LCAR, 1930 Harrington Drive, Lancaster, PA 17601 • Phone (717) 569-4625 • Fax (717) 569-5994

<http://www.youtube.com/watch?v=kes5zIg8jTw>



C&I Regional Conference

May 7th • LCCC

Early Bird Special . . .

\$75 Registration Discounted to \$60
Through March 25th

•• *See attached registration flyer* ••

C&I Regional Conference

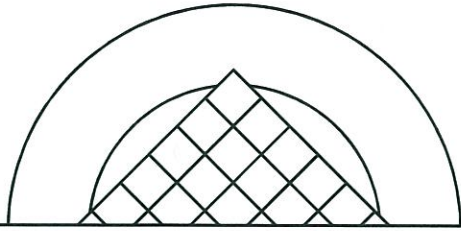
May 7th • Lancaster County Convention Center

Don't miss out on the fantastic program May 7th at the C&I Regional Conference. The Conference is only hosted by Lancaster once every four years, and there is a tremendous line-up of speakers.

This Friday, April 25th, is the registration deadline. Complete the attached registration form & return to LCAR!

LCAR • 1930 Harrington Drive • Lancaster, PA 17601
(717) 569-4625 • Fax (717) 569-5994

April 25th Registration Deadline



C&I Regional Conference

May 7th • Lancaster County Convention Center

Registration Deadline:
Friday, April 25th

*Please complete the attached registration form &
return with check to LCAR by this Friday!*