

**National Association of REALTORS®
2015 NAR Commercial Innovation Grant
Executive Summary**

Innovation Name: Commercial Investment Division Commercial Conference
Association Name: New Haven Middlesex Association of REALTORS
Contact Person: Bernadette Blaze

1. Project Summary

- a. Statement of purpose
- b. Original Goals
- c. Objectives
- d. Success criteria

The purpose of the NHMR Commercial Conference was to provide a one-day event of presentations, networking and lunch to educate our Commercial Investment Division (CID) members on the latest industry trends and issues. Presentation topics included an economic outlook for Connecticut and the area, environmental issues and lending issues.

Original goals were to increase awareness of our commercial division throughout our newly merged association, increase CID membership, enhance and expand the commercial content the association provides to our CID members and increase the awareness and visibility of the association's headquarters and facilities.

Objectives of the conference were to provide a diverse array of topics and speakers relevant to commercial real estate, provide continuing education credits, networking opportunities and strengthen the relationship between the association and CID members.

Success was based on the number of attendees, attendee satisfaction and increase in CID membership.

2. Project Financials

a. Project Budget Overview

CE instructor fee, breakfast, lunch, iPad incentive, networking hour refreshments, staff hours

b. Income

Registration fees	1025
Grant	2500
	3525

c. Expenses

CE Instructor	500
Breakfast	335
Lunch	542
Cocktails	247
Hors d'oeuvres	172
PSI upload for CE	44
Commercial Realtor pins	8
Staff hours	1000
Ipad incentive	500
	3348

d. Financials Summary

Income	\$3525
Expenses	\$3348
Gain	177

The original budget allocated \$1,000 toward a keynote speaker. Through the process of vetting speakers, we were able to procure the keynote speaker and speakers for two additional sessions, all at no charge. For this reason, we were able to come in under budget for speaking costs. However, the original budget did not account for staff hours involved in planning and facilitating the event, so the two balanced each other out.

The original intention was to host the entire event for free, to encourage maximum attendance. However, we felt that a free event might diminish the perceived value among members. We also wanted to discourage members from registering and possibly not attending. To remedy this, we came up with a fee schedule that gave a deep discount to our existing members and offered free conference registration for any new members joining CID with a new, paid membership. This also worked well as new member incentive.

3. Performance Measures & Benchmarks

Overall the event was a great success and met all of its objectives. 47 people attended, six of which joined CID via the new member incentive. Attendees were given the option to register for the full day, morning or afternoon sessions. Of the 47, 35 attended the full day event.

The conference was very well received and we received a great deal of positive feedback from the attendees.

4. Project Timeline

Event was held on Sept. 25, 2015

Planning meetings and speaker search began in March;

Venue & caterer were reserved in March

Speakers were finalized by July

Save the date announcements began in June. Event promotions & open registration began in early August and continued with weekly communications

Press invites were sent out in early September

Ongoing communications with presenters were conducted as needed once they were confirmed

5. Project Management

Three face-to-face planning meetings were held with the Association CEO, CID Chairperson & Association Marketing Director. Initial meeting was to discuss the overall concept for the event, timeframe/pricing, basic logistics and the types of speakers/content desired. In between, follow-up discussions were conducted via email.

Marketing Strategy

The event was promoted via the following vehicles, using both traditional print and electronic communications:

- Flyer distributed at monthly CID networking meetings, emailed to CID members before and after each monthly meeting, flyers were also posted at point of contact locations in the association's lobby display area, at the front reception desk, association Power Lunch events and at the CID summer networking event.
- Constant Contact email - initially sent to all CID members, then to all NHMR members
- Announcements in bi-weekly association E-Newsletter
- Announcement on our MLS service Message of the Day - while the MLS is primarily used by residential agents, we wanted to promote to residential agents that may be interested in the commercial area
- Facebook announcements
- Event schedule & registration on the CID section of the Association's web site and on the Association's Events Calendar
- Constant Contact email and a flyer were also sent to fellow Association Executives in the state and asked to share with their members.

6. Lessons Learned/Outcomes

a. Who Benefitted From Your Project?

Existing Commercial Investment Division members and members who work in the residential arena but are interested in exploring commercial opportunities benefitted from the conference. This was the first event of its kind created for our Commercial Members, who were very appreciative of the association's commitment to increase our commercial program offerings.

The Association also benefitted, as the event gave greater visibility and awareness of our corporate headquarters facilities, which is where the event was held.

b. Project Highlights

The Conference provided something for everyone with content on a variety of relevant topics including Green Buildings, Transportation-Oriented Development, Brownsfields and an economic overview of the state and the real estate climate. In addition to education and the diverse array of speakers, it also provided a good networking opportunity for our members with each other as well as with contacts from the state government, banking, & legal arenas.

We were fortunate that the speakers were willing to share their presentation content and we were able to make their power point presentations available on our CID website.

Networking hour held in our lounge/reception area provided a great way to wrap up the event with beer, wine and light refreshments. However because it was a day-long event, many attendees left after the last speaker.

We held an iPad drawing as an additional incentive to drive attendance. The winner was a member that had taken advantage of the Free conference registration for new members.

We distributed NAR Commercial REALTOR pins to all attendees

We received a lot of positive feedback on the quality and variety of content, as well as the organization of the event.

c. Project Best Practices

- We asked all speakers to include time for Q&A in each of their presentations
- Being able to offer CE credit helped increase attendance
- The variety of communication methods used to promote the event was very successful as we were able to reach all of our CID members no matter what level of technology they preferred
- Including breakfast & lunch and breaks in between each session helped to keep the day moving along
- Offering the program free to new members with their paid CID membership worked well as an incentive. The fee schedule also included a higher cost for non-members, so the new member incentive was truly the best value

- Posting pictures on our Facebook page, live throughout the day, added to the event "buzz"

d. What could have been improved, and how?

- Consider changing to a half-day event. Even though members were very interested in all of the sessions, we had lost a lot of attendees before the last session was over. A 3 hour morning or afternoon event, with breakfast or lunch as appropriate, might work better
- For future events we would create pricing with an Early Bird Discount
- If speakers and topics are finalized early enough before event promotion begins, I would recommend applying for the program to be approved for CE credit, this way you could provide the same content with CE credit, without having to add a 3 hour CE session
- Consider having one of the sessions be a panel discussion, to offer a change in format

e. Advice/Comments for Implementing in Another Association

In addition to comments listed under improvements, Associations could offer sponsorships to underwrite the cost of the event, in cases where a grant is not available or additional funds are needed. This can also make this type of program self-sustaining.

7. Supporting Documents - attached

- Event Flyer
- Event email
- Budget
- Receipts & invoices



Friday, September 25, 2015 NHMR North Haven Office
127 Washington Ave. West Bldg, Lower Level
Don't miss out on this exclusive programming for CID Members!

9:00 - 12:00 - Commercial CE & Continental Breakfast	"Green Commercial Buildings: Issues, Systems and Savings" Instructor: Edward S. Smith, Jr. CREI, ITI, CIC, GREEN, MICP, CNS Approved for 3 Hours of CE credit
12:15 - 1:00 Lunch & Keynote Speaker	"Investing in 2016: The Battle Between Fear and Opportunity", John Traynor, Sr Vice Pres, People's Bank
1:15 - 2:15 General Session	Transit-Oriented Development, Pullman & Comley An in-depth look at the public transportation initiatives underway in CT and the opportunities for development that these projects will create.
2:15 - 3:00 General Session JUST ANNOUNCED!	Tim Sullivan, Deputy Director, DECD Tim oversees several key components of Governor Malloy's economic development strategy, including tourism, brownfield redevelopment, transit-oriented development, and waterfront initiatives.
3:00 - 4:00 Cocktail & Networking Hour	

Space is Limited. Advanced Registration by Sept. 23 is Required

Name (as it appears on your real estate license) _____
 For CE Registration: Real Estate License Number (REQUIRED): _____ Broker Salesperson # _____
 Company _____ Phone # _____
 Fax # _____ E-mail Address _____

CONFERENCE SPECIAL - CID MEMBERS CAN ATTEND ALL THREE SESSIONS FOR ONLY \$20!!!

New Member Special - Join CID for \$40 & Attend the Conference for FREE!!

		CID Member	New Member	Non-Member
Full Conference, 9:00 - 4:00	Breakfast, CE, Lunch, Speaker Sessions & Cocktail/Networking Hour	<input type="checkbox"/> \$20	<input type="checkbox"/> Free w/\$40 pd membership	<input type="checkbox"/> \$60
CE Only 9:00 - 12:00	CE & Breakfast	<input type="checkbox"/> \$15	<input type="checkbox"/> Free w/\$40 pd membership	<input type="checkbox"/> \$35
Afternoon Only 12:15 - 4:00	Lunch, Speaker Sessions & Cocktail/Networking Hour	<input type="checkbox"/> \$20	<input type="checkbox"/> Free w/\$40 pd membership	<input type="checkbox"/> \$40
Yes! I am joining as a New CID Member!			<input type="checkbox"/> \$40	
Total		\$ _____	\$ _____	\$ _____

Payment Info: Please enclose a check made payable to **NHMR** or indicate charge information.

Check # _____ OR Visa Mastercard Am Ex

Name on Credit Card: _____

Card Number: _____ Exp: _____

Signature: _____ Card V-Code: _____

Return to: NHMR-CID, 127 Washington Ave W LL, North Haven, CT 06473 203-234-7700

Bernadette@nhmrealtors.com *Fax: 203-234-3980

NHMR CID Conference & Commercial CE!

From: New Haven Middlesex Association of REALTORS [Add to Contacts](#)

Sent: Fri, Sep 18, 2015 at 12:49 pm

To: bernadette@nhmrealtors.com

Don't miss out on this exclusive Commercial programming!



**New Haven Middlesex Association of Realtors
Commercial Investment Division Presents:**

2015 Commercial Conference

Friday, September 25, 2015

NHMR North Haven Office

127 Washington Ave. West Bldg. Lower Level

Don't miss out on this exclusive commercial programming!

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and the opportunities for development that these projects will create.

2:15 - 3:00 General Session	Tim Sullivan, Deputy Commissioner at DECD. Tim oversees several key components of Gov. Malloy's economic development strategy including tourism, brownfield redevelopment, transit-oriented development & waterfront initiatives. A great session to end the day!
3:00 - 4:00 Cocktail & Networking Hour	

Conference Special - CID Members can attend all 3 sessions for only \$20!!

New Member Special - Join CID for \$40 & Attend the Conference for FREE!

Space is Limited. Advanced Registration is Required.

[Click Here to Download a Registration Form.](#)

Return Form to New Haven Middlesex Assoc. of Realtors - CID,

127 Washington Ave. West LL, North Haven, CT 06473

Fax (203) 234-3980 Email: Bernadette@nhmrealtors.com

Commercial Conference
Budget

Grant Awarded \$2500

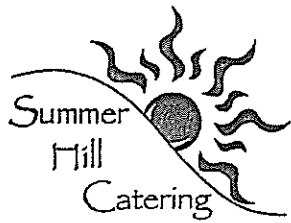
Expenses

CE Instructor	500
Breakfast	335
Lunch	542
Cocktails	247
Hors d'oeuvres	172
PSI upload for CE	44
Commercial Realtor pins	8
Staff hours	1000
Ipad incentive	500
	3348

Income

CE instructor fee	1025
Grant	2500
initial expenses	-1847.23
Staff time	(\$1,000)
Ipad	-500
	\$178

Registration fees	1025
Grant	2500
	3525



POSTED

NHMAR—North Haven
Day Long Seminar
September 25, 2015

Breakfast Menu
Blueberry Scones
Almond Scones
Streusel Coffee Cake
Greek Yogurt
Fresh Fruit
Orange Juice and Coffee

Price

\$7.00/person x 45	\$315.00
6.35% Ct Sales Tax	20.00
Total	335.00

Lunch Menu
45 Assorted Sandwiches
Chocolate Chip Cookies
Oatmeal Cookies
Potato Chips
water, Soft Drinks

Price

\$11.00/person x 45	\$495.00
6.35% CT Sales Tax	31.00
Total	\$526.00

Please make check payable to Summer Hill Catering. Thank you!

The State of Connecticut requires Summer Hill Catering to inform the client of the following:
Thoroughly cooking all meat, poultry, eggs, fish and shellfish reduces the risk of food borne illness.

257 Summer Hill Road · Madison · CT · 06443
203 · 421 · 3765
www.summerhillcatering.com



Final Details for Order #102-9127995-7455468

Print this page for your records.

Order Placed: October 19, 2015
Amazon.com order number: 102-9127995-7455468
Order Total: \$514.00

Shipped on October 20, 2015

Items Ordered	Price
1 of: <i>Apple iPad Air 2 MH2W2LL/A (16GB, Wi-Fi + Cellular, Gold) NEWEST VERSION</i>	\$514.00
Sold by: world-sellers (seller profile)	

Condition: New
BRAND NEW

Shipping Address:
 Nick Calvo
 8 WHALERS PT
 EAST HAVEN, CT 06512-4818
 United States

Item(s) Subtotal:	\$514.00
Shipping & Handling:	\$0.00

Total before tax:	\$514.00
Sales Tax:	\$0.00

Shipping Speed:
 Two-Day Shipping

Total for This Shipment: \$514.00

Payment information

Payment Method:
 American Express | Last digits: 5003

Item(s) Subtotal:	\$514.00
Shipping & Handling:	\$0.00

Billing address
 Nick Calvo
 127 Washington Ave
 West Building, Lower Level
 NORTH HAVEN, CT 06473-1715
 United States

Total before tax:	\$514.00
Estimated tax to be collected:	\$0.00

Grand Total: \$514.00

Credit Card transactions American Express ending in 5003: October 20, 2015: \$514.00

To view the status of your order, return to [Order Summary](#).

Please note: This is not a VAT invoice.

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For Commercial Conference

9-25-15



79 WASHINGTON AVENUE
NORTH HAVEN, CT 06473

Store Telephone: (203) 234-1795
Pharmacy Telephone: (203) 234-7461

Store #694 09/24/15 03:44pm

BAKE SHOP

MINI ECLAIRS 3.99 F
MINI ECLAIRS 3.99 F
CKI CHOC CHIP 3.99 F
BUTR SPRITZ CK1 3.49 F
PSTRY PLTR MINI 15.99 F
PSTRY PLTR MINI 15.99 F

CHEESE SHOP

CHEESE TRAY 11.67 F
SUPREME PARTY TR 19.99 F

GENERAL MERCHANDISE

FW PRO CORKSCREW 9.99 T

GROCERY

CD GINGERALE 7.5 3.99 B
BONUS BUY SAVINGS 0.32-B
PRICE YOU PAY 3.67

DP BTL/CAN DEPOSIT 0.40 F
DIET COKE 7.5Z 8 3.99 B
BONUS BUY SAVINGS 0.32-B

PRICE YOU PAY 3.67

DP BTL/CAN DEPOSIT 0.40 F
SB FILLED PC125 2.99 T
SB FILLED PC125 2.99 T
COKE 7.5Z 8PK 3.99 B
BONUS BUY SAVINGS 0.33-B

PRICE YOU PAY 3.66

DP BTL/CAN DEPOSIT 0.40 F
CHNT PLT 12CT 3.99 T
CHNT PLT 12CT 3.99 T
CHNT PLT 12CT 3.99 T
CHNT CRYC CUT TU 3.79 T
POLAND WATER 24P 4.99 F
DP BTL/CAN DEPOSIT 1.20 F

PRODUCE

FRUIT PLATTER 19.99 F
VEGETABLE PLTTER 19.99 F

Total Before Savings 170.17
Your Savings 0.97
Total After Savings 169.20
TAX 2.71
**** BALANCE 171.91

Payment Type: AMER EXPRESS 00

Card: *****1010
Payment Amt: \$171.91
BALANCE: \$
AUTH# 544833 09/24/15 03:45pm

AMER EXPRESS 171.91
CHANGE 0.00

***** SAVINGS SUMMARY *****

Sav-Rite Liquors
117 Washington Ave.
North Haven, CT 06473
203-239-3779

Date Time Sta Clerk Inv #
09/24/15 3:22 PM 4 H 3384162

SEBASTIANI 750ml 16.99 4 67.96
LA CREMA 750L 19.99 4 79.96
ICE 20lbs 3.99 3 11.97
HUG LIGHT 12pk 9.99 1 9.99
CORONA 12pk 13.99 1 13.99
THINBLE ISL 6pk 0.99 2 17.98
SAM 4841G 12pk 13.99 2 27.98

Sub-Total \$ 229.83
Sales Tax \$ 13.85
Deposits \$ 1.00
Total \$ 244.68

Number of items 17

Paid by Amer Ex \$ 244.68

Change \$ 0.00

THANKS FOR SHOPPING SAV-RITE!!!
Like us on Facebook!

Cardholder: ROYLE/PATRICIA H

Card Account: XXXXXXXXXXXX1010

Amount: \$244.68

Authorization: 542260

Cardholder Signature

Add. Salads for
Commercial Conference



79 WASHINGTON AVENUE
NORTH HAVEN, CT 06473

Store Telephone: (203) 234-1795
Pharmacy Telephone: (203) 234-7461

Store #694 09/25/15 12:24pm

PRODUCE
1.16 lb @ 6.99 /lb
WT SALAD. BAR 8.11 F
1.08 lb @ 6.99 /lb
WT SALAD. BAR 7.55 F
TAX 0.00
**** BALANCE 15.66

Payment Type: DEBIT CARD 00
Card *****1156
Payment Amt: \$15.66
Cashback Amt: \$0.00
BALANCE: \$
AUTH# 715714 09/25/15 12:25pm

DEBIT CARD 15.66
CHANGE 0.00
09/25/15 12:25pm 694 14 16 3307

2015 CARD SAVINGS
\$837.38

*****GAS REWARDS POINTS*****

Balance 227
Earned this visit 16
Pts earned this visit expire
10/25/15.

YOU HAVE EARNED A GAS DISCOUNT OF
\$0.20 PER GALLON!
MAXIMUM REDEMPTION OF \$2.20 PER GALLON
IN A SINGLE TRANSACTION.

PTS ARE SHARED AMONG YOUR HOUSEHOLD.
SEE STOPANDSHOP.COM FOR DETAILS.

Customer 22*****3364

Thank you for shopping at STOP & SHOP.
My goal is to ensure your satisfaction
every time you shop with us. If there
is anything more I can do to improve
your experience please call or write.
Craig Nesaro, Store Manager

Visit us on the Internet
www.StopAndShop.com

I'm glad you shopped here today.
Your Cashier -- BRITTANY

Your logo store



TEAM STORE

734 S. Vermont, Unit #2
Palatine, IL 60067
Phone: (847) 991-4010
Fax: (847) 255-9393
Service@teamstoreonline.com

Invoice

Date	Invoice #
7/29/2015	44663

Bill To
New Haven Middlesex AOR Bernadette Blaze 127 Washington Ave West Bldg, LL North Haven, CT 06473

Ship To
New Haven Middlesex AOR Bernadette Blaze 127 Washington Ave West Bldg, LL North Haven, CT 06473

P.O. Number	Terms	Rep
New Member Pins	Net 30	JSD

Ship	Via
7/16/2015	Ground - UPS

Quantity	Description	Price Each	Amount
1	UPS Ground Shipping Charges - for new member pins	8.88	8.88
	Out-of-state shipment, exempt from sales tax	0.00%	0.00

	Total	\$8.88
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Accepted Payment Methods:
Check
Visa/Mastercard
American Express

Looking to pay by credit card?
Call our 24-hour SECURE voice mail box
(847) 991-4044 then 109
(NEVER e-mail credit card information)