



LAND ECONOMICS SOCIETY

**LAI CHAPTER PRESIDENT'S ROUND TABLE MINUTES**

**OCTOBER 1, 2015**

**10:00am – 12:00pm Pacific**

**Purpose of the President's Round Table:** The purpose of the President's Round Table is to provide a venue for informal conversation to identify topics of mutual interest and for the sharing of best practices, activities and ideas between LAI chapters. It is not a substitute for the formal board meetings. The following list of topics is suggested to get the conversation started and other topics are welcomed and encouraged.

Chapter Presidents			
Chapter	Name	Position	P/A
Aloha – Hawaii	Jan Yokota	President	A
AUM	Anil Hatkar	President	A
Atlanta	Russ Posey	President	A
Baltimore	Stephen Rudow	President	A
Boston	Tom Goodwin	President	P
Ely – Chicago	Todd Cabanban	President	A
George Washington	Erwin Andres	President	P
Golden Gate	Amy Neches	President	A
London	Angus McIntosh	President	A
Los Angeles	James Fawcett	Past President	P
Madrid	Javier Galante	President	A
Memphis	Ann King	Past President	P
Minnesota	Brad Wood	President	P
New York	Alice DiMarzio	President	A
Orange County	Karen Davidson	Past President	P
Ottawa	Miguel Tremblay	President	A
Philadelphia	Anthony Forte	President	A
Phoenix	Cindy Hammond	President	P
Sacramento	Tim Hefler	President	A
San Diego	Suzanne Varco	President	P
Simcoe	Bronwyn Krog	President	A
UAE	Rudayna Abdo	President	A
Vancouver	Garth Evans	Incoming President	P
Zia - New Mexico	John Nye	President	P

Ancillary and Guests			
Chapter	Name	Position	P/A
Orange County	Steven R. Gragg	LAI First Vice President	P
Sacramento	Tim Youmans	LAI President	P
Madrid	Aurelio Ramirez-Zarzosa	Europe VP	P
Los Angeles	Kathline King	Western Region AVP	P
Ely	Jordan Peters	Central Region AVP	P
Simcoe	Robert McBride	Central VP	P
Aloha	Cheryl Soon	Asia/Pacific VP	P
Simcoe	Ian Lord	Immediate Past President	P
Ely	Laurie Marston	Secretary	P
Phoenix	Sheila Harris	Asst. Treasurer	P
Los Angeles	James Fawcett	Awards Chair	P
Ely	Cassandra Francis	PR Chair	P
Ely	Phil Adams	PS&A	P
Minnesota	Cecile Bedor	Member	P
At-Large Member	Randy Williams		P
	Sheila Hamilton	LAI	P
Los Angeles	Ron Buss	LEF President	P
Baltimore	Rachel Edds	LEF Treasurer	P
Simcoe	Russell Mathew	LEF Secretary	P

## **Welcome & Chapter roll call – Steven Gragg, LAI First VP**

Steven Gragg welcomed everyone to the LAI Chapter President's Roundtable and to San Diego, CA.

### **LAI / LEF branding – Phil Adams**

Phil Adams reviewed the public relations chapter toolkit. Phil recognized the effort of the chapters implementing in the logos and websites, noting that Minnesota's website looks fabulous.

The purpose of the public relations chapter toolkit is to give the membership a sense of the powerful abilities and stature of the members in their own chapters, which they may not be aware of. They have been putting together a program for the chapters to use for media relations. It will provide a sense of how to implement it, and they will provide a webinar for the chapters.

Steven Gragg: What is the incentive for a chapter to use the kit? Why would a chapter want to send out a press release?

Phil Adam: Whether you think it's exciting or not, its news about the chapter and it creates excitement and helps to grow LAI. It's easy to think that what you're doing is not important, but that's how you build the organization.

Tim Youmans: It helps when recruiting new members.

Cassandra Francis: This is something you are asked when joining the honorary society, and it helps explain who we are and who the members are. It helps the local chapter get publicity for their local events.

Tim Youmans: With all the duties a president has, this could be assigned to a member to handle.

Phil Adams: We can help get it organized with your chapter.

Steven Gragg: Chapter Presidents do you find this of value, and how can we assist in the effort?

Jordan Peters: At the Ely Chapter we do see a value in this, and on the board is a chair of the public relations committee. Outside of this new structure they have been sending out information to the media for the past 2 years. There has been mixed success but it is a start. The positives are that they have gotten the word out about their events.

Erwin Andres: Thinks it's great, but what is newsworthy so that it actually gets picked up? The monthly luncheons are probably not, awards are great but how often do we hand out awards? Other than announcements of new board members, awards, and meetings what else should they send out?

Phil Adams: You can record your presentations and slides and post on YouTube channel or publicize on LinkedIn, and properly published this can be successful. The programs are one of the key ways to get people interested in what chapters are doing.

Tim Youmans: Each chapter will come up with their own strategy.

Cecile Bedor: Thinking of their Minnesota Chapter past speakers and topics and can see how they could issue a press release about the presentations and drive people to their website.

Brad Wood: The try to bring in good speakers, how do you attract them? If they go to your website and you have press releases posted that can help. The speaker doesn't know if the release was published in the media. It's a way to say "wow" this is a newsworthy organization.

Cassandra Francis: It can show the level and quality of the membership.

Steve Gragg: As he looks around the room there are people with significant projects and if members can sneak into their company press releases that they are a member of LAI that is a way to leverage it and make it more relevant to the real estate community.

Steve Guinn: Press is constantly looking for stories, they like coming to an event and write about being there rather than a press release. Pick and choose the events to invite the media to and have them attend. It depends on the speakers and topics. They have the head of the Memphis business paper speaker at their next event.

Phil Adams: Reviewed the membership PowerPoint.

Brad Wood: They will use it to send to prospective members.

Jordan Peters: They used it at a reception for new members and it was very successful.

Rachel Edds: How will chapters get the ppt?

Steven Gragg: It will be emailed and also posted on lai.org. He recognized Cassandra Francis as the Public Relations committee chair and thanked her for the hard work and significant tools provided this year.

### **Chapter Website template update – Sheila Hamilton**

#### Implemented

Ely Chapter

Sacramento Chapter

Golden Gate Chapter – On Hold – Ann Slade

Atlanta

Philadelphia

Minnesota

Orange County

#### Signed agreements not yet implemented

Simcoe

Boston

#### Requested agreement but not signed copy not yet returned

Baltimore

Considering  
Los Angeles  
San Diego  
Madrid  
Aloha

**Chapter Support Grants – Steven Gragg**

Orange County \$2500.00 Chapter Website  
Boston \$2500.00 Chapter Website

**Strategic Plan Update and Process – Call for Volunteers – Ian Lord**

Ian Lord noted the recommendations by the Governance Committee of the strategic planning process. October 2017 is the target for adoption of a new strategic plan. There is a suggested timetable, to be approved by the Board of Governors today. The society wants to harness what's valuable to the chapters and the members. The Chapter Presidents need to ensure their chapters are informed.

Steven Gragg: It is time to revisit and refocus. As Chapter Presidents you will be a sitting member of the committee, or your designated chapter member. The Membership GAP is a big part of the strategic plan, how do we sustain our membership. How do we identify, attract and engage members in the organization. The LAI Membership GAP committee met via teleconference. There is a group in the Phoenix Chapter called the PathFinders (the path to the pin).

Cindy Hammond: This was created in 2014 by a former LAI student member. There is roughly 35 members, they pay \$75/year and have raised \$8,000.00 in sponsorships. Their events are tours, workshops, and networking mixers.

Sheila Harris: A lot of what the PathFinders are doing is driven by the chair of the group. The LAI Phoenix Chapter has struggled with its membership base and had to do something to engage future members and leaders.

Steven Gragg: The Golden Gate Chapter is not concerned about student members or others that are not eligible to join per the 10 years of experience requirement. They don't want to be required to participate in a PathFinders type membership but don't have any issues if other chapters participate. The Golden Gate Chapter has a member on the GAP committee to assist with forming the concept. Anyone can participate on the committee and the goal is to study the issue and provide recommendations to present to the Strategic Plan committee.

**Chapter Tax Status (see attachment) – Sheila Hamilton**

Sheila Hamilton reviewed the chapter tax status and asked for an update from chapters that are listed as revoked.

## **Other topics – best practices – Group – Moderated by Brad Wood, LAI Minnesota Chapter President**

Brad Wood: What are the biggest challenge facing your chapter?

Tom Goodwin: The Boston Chapter has great programs because the founders are very well connected. The membership transition issue is important as most members are 60 or older and extremely well known. How many 40 something's do we know out there? We need to look at how to get younger people into the membership.

John Nye: The Zia Chapter is focused on how to be of value to the community. Lending their expertise to the community it has invigorated the Chapter. Do you want to be a knife and fork club, or would you like to accomplish something positive?

Karen Davidson: The membership is aging, but the Orange County Chapter has excellent programs.

Erwin Andres: Very prominent group of members, the programs are great and a marketing opportunity, the chapter cycles in and out board membership because they don't show up. They are going to focus on getting younger members.

Garth Evans: The Vancouver Chapter has similar issues as the Boston Chapter. The membership is aging, the younger prospects are coming to the events as guests but don't show any interest in joining.

Jordan Peters: The Ely Chapter is similar to Boston. LAI has a long history and reputation in Chicago, general perception is the value because you have to be invited to join. Programs are well attended and excellent. They also have the aging issue.

Robert McBride: The Simcoe Chapter is successful and has good programming.

Bronwyn Krog: The Simcoe Chapter has talked about getting younger people to join. The organization has always been quite senior people.

Jim Fawcett: When the younger professionals go to ULI they think they have a better chance of getting a job. They are trying to get academia involved. They would like to have their universities participate to a greater degree.

Cheryl Soon: The Aloha Chapter's biggest issue is board leadership. They have a hard time getting people to attend.

Laurie Marston: The Ely Chapter is looking at diversity and how to retain and gain members. There is a very strong ULI chapter in Chicago and they have a much higher profile in the media. For individual members who aren't active at the local level, what do they get out of LAI?

Sheila Harris: How do we show the value of LAI to the broader community? Next week during the ULI conference she has put together a half day briefing by the Federal Reserve Bank of San Francisco for the ASU Masters in Real Estate Development students will be attending a half day briefing the Federal Reserve Bank of San Francisco. She put this together under the LAI umbrella.

Suzanne Varco: ULI tends to be the younger professionals with less experience, and LAI are the senior people.

Steve Guinn: ULI programs are quite different than LAI programs and they have really stepped up their game in the Memphis area. Their dues are 5 times more expensive.

Brad Wood: We define LAI as more intimate and thought provoking.

Karen Davidson: Members know when they pay their ULI dues they are going to get their value for the price.

Cassandra Francis: In Chicago LAI is known as the high level experts, and the events are intimate and the meets are very different.

Erwin Andres: Lou Slade made it a point to bring him into LAI because of the experience he had at 38 years of age, and now he is president of the George Washington Chapter. Lou thought it would be good for Erwin to meet his peers.

Cecile Bedor: At the last Minnesota Chapter board meeting they took rosters from other organizations and looked for prospects.

Bronwyn Krog: Sheila Hamilton provided them with a chart showing the category of professions with in their membership and they looked into what areas they may be missing.

Jim Fawcett: We forget we can use our members to present programs.

Tom Guinn: Annual roundtable where members talk about their projects.

Steve Guinn: LAI is more intellectual as an organization.

Cassandra Francis: LAI is about making relationships and sharing knowledge, not necessarily getting business.

Cindy Hammond: LAI is more similar to the ULI product councils without the cost.

Karen Davidson: Younger people think about the fastest path to their goal, and not interested in relationship building. The biggest reason members drop is when their company won't pay for their dues.

Ian Lord: As a result of discussions with the London Chapter, he created a document on the delineation of a successful chapter. This is posted on the chapter resources webpage.

Brad Wood: They are making a concerted effort to bring in members under the age of 50.

Steve Guinn: What percentage of the members show up at the lunches? They have about 75% nonmembers paying to show up.

Brad Wood: The Minnesota Chapter upgraded to the new chapter website template, and they are using the new membership brochure. The target is 15 new members this year.

Steven Gragg and Brad Wood thanked everyone for their comments. The meeting adjourned at 12:00pm.