



Arcadia Association of REALTORS®

Executive Summary & Final Report

Commercial Real Estate Day at the Races

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Innovation: Commercial Real Estate Day at the Races

Association: Arcadia Association of REALTORS®

1. PROJECT SUMMARY

a) Statement of Purpose

The purpose of the Commercial Real Estate Day at the Races is to enhance both member and non-member experience in the commercial real estate industry by helping to bridge the gap between local commercial real estate practitioners and corporate-level practitioners (who are typically non-REALTOR® members).

b) Objectives

The objectives of the event are to:

- Create an environment conducive to networking and building connections
- Create a fun environment that would attract attendees from a variety of commercial real estate-related entities
- Show local level commercial REALTORS® how to begin a business relationship with corporate commercial real estate practitioners
- Educate attendees on how to make themselves stand out from the crowd when it comes to business marketing
- Provide an educational event that will assist in furthering the business endeavors of members and non-members alike
- Make attendees aware of the Arcadia Association Commercial / Investment Committee's strong commitment to providing quality education offerings for those in commercial real estate and those interested in becoming involved with commercial real estate

2. PROJECT FINANCIALS

a) Project Budget Overview

The budget for the project included funds for the venue, coffee/tea service in the morning, lunch for attendees and the cost for the keynote speaker.

b) Income

Our event income was as follows:

- | | |
|------------------------------|---------|
| • Sponsorship | \$2,325 |
| • Attendee Tickets Purchases | \$4,912 |
| • N.A.R. Innovation Grant | \$3,000 |

c) Expenses

Our event expenses were as follows:

- | | |
|---------------------------------------|---------|
| • Keynote speaker | \$3,000 |
| • Venue (includes all food/beverages) | \$5,012 |

- Revenue Share agreement with surrounding Associations \$72
- Gifts for Panelists \$105

3. PERFORMANCE MEASURES & BENCHMARKS

a) Outline Tasks, Meetings and Activities Required to Close the Project

Our Commercial / Investment Committee created a special Task Force at the beginning of the year. This Task Force met on a monthly basis beginning in March. The Task Force was tasked with making all the decisions regarding the event – both major and minor. Those tasks included, but were not limited to decisions on the venue, the date, the time, the event program, the keynote speaker and the food options. Other minor activities such as the creation of an event program, the coordination of final details and coordination with the sponsors were completed by the staff liaison to the Committee about a week out from the event.

b) To What Level of Success was Achieved?

The event was considered to be extremely successful due to the attendance and the feedback received. This event gained the largest attendance the Committee has had to an event of this nature.

4. PROJECT TIMELINE

January – Develop a specialized Task Force to brainstorm, plan and make all decisions regarding the event.

February – Submit Innovation Grant Application to N.A.R.

March – Learn if grant is received and continue brainstorming and moving forward based on monetary resources available. During this time, the Task Force had decided which venue they would prefer to use.

April – Do a site visit to the venue to seek out an appropriate area for our event.

May – Book the venue. Inquire with surrounding Associations and entities regarding the possibility of partnership. Begin seeking out event sponsorship by Affiliate members and other Commercial real estate vendors.

June – Begin serious discussion about preferred speakers for the event. Task Force and Staff Liaison look into all options and costs involved with various speakers.

July – Finalize speaker lineup. Finalize a marketing flyer and begin advertising. Work with entities in which a partnership exists to ensure they are marketing the event adequately.

August – Send out email emails to entire Association membership and also to Commercial Practitioner Contact Database in-house to announce the event.

September – Begin sending out weekly emails to entire Association membership and also to Commercial Practitioner Contact Database in-house to encourage registration. Pitch the event at weekly membership meetings.

October – Conduct final push for registrations. Finalize last minute details with venue and sponsors. Execute event.

5. PROJECT MANAGEMENT

a) Marketing Strategy

Our marketing strategy was a simple one: to reach as many Commercial, Investment and Residential real estate practitioners as possible. In order to achieve this, we used several different methods of delivery. Initially, we created a marketing flyer. We then distributed the flyer via our weekly membership meeting and made them readily available at our Association for any and all meetings that we had. We also emailed this flyer to our entire membership with a brief synopsis of what the event included. Finally, we partnered with local Associations and real estate entities to help market the event to their members as well. As an additional effort to spread the word regarding the event, our entire Commercial / Investment Committee divided all of our large local real estate offices amongst themselves and personally visited each office to promote the event.

b) Planning Meetings

Our Commercial / Investment Committee has regular monthly meetings. This project was an active topic at each meeting for the ten months it was being planned. In addition, a special Task Force was created of Committee members to meet monthly throughout the process to discuss details and decisions.

c) Day-to-Day Project Management

On a day-to-day basis, our Committee Staff Liaison monitored the progression of securing speakers and sponsors. Also, the Liaison actively promoted the event and received registrations, all while answering any questions that potential attendees and sponsors might have. Once the event details were entirely finalized, the day-to-day management was minimal until the event drew close. The entire week prior to the event was extremely labor intensive for the Staff Liaison regarding this event due to last minute registrations and last minutes details. On the day of the event, the Staff Liaison was present for the entire day to ensure that all went smoothly.

6. LESSONS LEARNED / OUTCOMES

a) Who Benefitted From Your Project?

Arcadia Association of REALTORS® members, members of surrounding REALTOR® Associations and commercial real estate related vendors will benefit from this project. As local leaders in the Commercial real estate education arena, our Committee makes it a point to keep all education opportunities open to any REALTOR® or real estate related vendor or Affiliate, rather than make them exclusive to our members only. Our goal is to not only assist our own members to grow in their knowledge, but also all members of surrounding Associations.

b) Project Highlights

Highlights of the event include:

- An extremely knowledgeable group of four expert panelists to offer their expertise regarding commercial real estate
- A keynote speaker with a great topic
- A fun environment for networking and socializing
- Attendees are still talking about how this has been our best event yet

c) Project Best Practices

Best practices include:

- Having an extremely organized Staff Liaison to help coordinate all details and facilitate the event on the day-of.
- Researching your speakers to ensure that they come highly recommended and will work well with the audience of the event.
- Having structured monthly meetings to ensure all volunteers are staying committed to their responsibilities and that all details are covered.
- Ensuring that your Task Force includes only 3-4 people maximum so that ideas for the event will be as focused as possible.
- Utilizing Association Affiliate members to help sponsor the event.
- Ensuring that Committee members are available and on-hand for the event on the day-of to assist with coordinating all elements.

d) What Processes Worked Well

- Having a staff liaison as a centralized point-person to coordinate the event and ensure all details were covered
- Having a specialized Task Force to plan the event, rather than a Committee as a whole
- The process used of accepting ticket purchases (Constant Contact and our in-house system) and getting those physical tickets to the attendees ahead of time
- The monthly Task Force check-in meetings to assist with making all decisions regarding the event

e) What Could Have Been Improved, and How?

The one major thing that could have been improved was the communication regarding the location of the event within the venue. We realized too late that the event location was a bit difficult to find for those who had not been to the venue previously, even though there were directional signs from the parking lot. It would have been extremely helpful if we had sent out with the ticket an informational sheet with a map and extremely detailed instructions on how to find the venue and how to find the event within the venue.

f) Advice/Comments for Implementing in Another Association

This event was extremely popular and we would recommend other Associations trying something similar. The main thing to ensure is that your Staff Liaison or Point-Person is a very detail-oriented and organized person. It is very important so that all details are

covered and nothing is missed. Also, it would be a great idea to assign a Task Force to make decisions. The Task Force needs to be fully aware of their monthly commitment and be willing to brainstorm and share ideas. They are there for more than just decision-making; they would need to help develop ideas also. This event should prove to be as successful for another Association as it was for ours.

The Arcadia Association of Realtors®, CVAR, PFAR and SGVEP are proud to present:

Commercial Real Estate Day at the Races



Registration Code: AAR

See back of flyer for additional details and program features

Friday, October 4, 2013

Program - 9:00 a.m. to 12:00 pm.

Lunch - 12:00 p.m. to 2:00 p.m.

Live Racing Starts at 1:00 p.m.

World Famous Santa Anita Racetrack
285 W. Huntington Drive
Arcadia, CA 91007

Early Bird Pricing*: \$49

Regular Pricing: \$75

*For Early Bird pricing, must register on or before Monday, September 23rd.



Join us for a unique experience of business and fun at this World Famous venue. The day will begin with a business panel of corporate commercial practitioners from firms such as NAI Capital, Jones Lang LaSalle, CB Commercial and Cushman & Wakefield. Learn what is happening in Commercial Real Estate and where things are headed. Learn how to network and conduct business with these firms and discover the ins and outs of working inside commercial real estate transactions with these companies. You will leave with specific tools, tricks and talking points to help increase your commercial real estate business.

Event Fee Includes: Park and Event Admission, Valet Parking, Event Attendance, Buffet Lunch, Racing Program and 9 Thoroughbred Races. **Parking only included if ticket is picked up at least 1 day prior to event.

To register for this exciting event, visit www.TheAAR.com and click on the event name under "Upcoming Events". Use the Registration Code: AAR. For questions, call the AAR at (626) 446-2115.

Event Sponsors:

Odic Environmental & Energy

WFC Design Development Constructors
www.wfcconstruction.com



Commercial Day at the Races Program & Event Info

PROGRAM:

9:00 a.m. to 10:15 a.m. PANEL OF CORPORATE COMMERCIAL PRACTITIONERS



Bill Ukropina,
Coldwell Banker
Commercial,
North County



Sheri McCanless,
NAI Capital



Ron Heim,
Cushman &
Wakefield



Sam Foster,
Jones Lang
LaSalle

Topics:

- Commercial Trends in Their Areas of Expertise
- How to Approach Transactions with Corporate Practitioners

10:30 a.m. to 12:00 p.m.

KEYNOTE SPEAKER



Patricia Lynn,
CCIM, N.A.R.
Signature Series
Speaker

**“Getting Heard Above the
Noise: Strategies to Acquire
Loyal Clients and Customers”**

12:00 p.m. to 2:00 p.m.

BUFFET LUNCH IN THE CLUB PLAZA

SALADS

House Caesar Salad
Greek Salad
Refreshing Fruit Salad

ENTREES

Rosemary Chicken with Italian Capicola
Beef Stroganoff
Filet of Pacific Striper
Yukon Gold and Red Bliss Potatoes
Chef's Selection of Seasonal Vegetables
Artisan Dinner Rolls and Creamery Butter
Chef's Assortment of Petite Pastries, Cookies, Bars and Brownies

BEVERAGES

Soda
Bottled Water
Iced Tea
Coffee

1:00 p.m.

LIVE RACING BEGINS

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Commercial Day at the Races Sponsorship Packages

Friday, October 4, 2013

Program - 9:00 a.m. to 12:00 pm.

Lunch - 12:00 p.m. to 1:00 p.m.

Horse Races Start at 1:00 p.m.

*World Famous Santa Anita Racetrack
285 W. Huntington Drive
Arcadia, CA 91007*

WINNER'S CIRCLE SPONSORSHIP LEVEL **\$500**

GUARANTEED LEVEL OF BUSINESS EXCLUSIVITY IN THIS CATEGORY (I.E. ONLY ONE WINNER'S CIRCLE ESCROW SPONSOR, ONLY ONE WINNER'S CIRCLE MORTGAGE SPONSOR, ETC.)

- Full 8-foot long table
- Announced as a Winner's Circle sponsor and given a 5 minute spotlight during the event
- 2 complimentary tickets to the event (lunch included)
- Logo and recognition on fliers, event-related emails, AAR REALTOR® Magazine publication, event program and event Powerpoint slideshow
- 3-month banner ad on AAR website
- 4-weeks banner ad in AAR e-Newsletter

**Please provide a raffle prize for the day of the event (suggested value: \$25)*

FINISH LINE SPONSORSHIP LEVEL **\$250**

- Half of 8-foot long table (will be shared with one other Finish Line sponsor)
- Announced as a Finish Line sponsor during the event
- 1 complimentary ticket to the event (lunch included)
- Logo and recognition on fliers, event-related emails, AAR REALTOR® Magazine publication, event program and event Powerpoint slideshow
- 2-weeks banner ad in AAR e-Newsletter

**Please provide a raffle prize for the day of the event (suggested value: \$25)*

STARTING GATE SPONSORSHIP LEVEL **\$75**

- Logo and recognition on fliers, event-related emails, AAR REALTOR® Magazine publication, event program and event Powerpoint slideshow
- Business card size advertisement in the full color event program

**This sponsorship level does not include a physical presence at the event*

For questions about sponsorships or to secure a sponsorship, please contact Stephanie Maertens:

Phone: (626) 446-2115 / Email: Stephanie@TheAAR.com

**1st Payment Received Secures Exclusive Winner's Circle Sponsorship per Business Category*

NOTES:

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Arcadia, CA 91007



The Arcadia Association of Realtors®, CVAR, PEAR and SGVEP sincerely thank you for joining us for the Commercial Real Estate Day at the Races

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9:00 a.m. to 10:15 a.m. PANEL OF CORPORATE COMMERCIAL PRACTITIONERS



Bill Ultopina,
Coldwell
Banker
Commercial,
North County



Sheri McCarrless,
NAI Capital



Ron Heilm,
Cashman &
Wakefield



Sam Foster,
Jones Lang
LaSalle

Topics:

- Commercial Trends in Their Areas of Expertise
- How to Approach Transactions with Corporate Practitioners

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Signature Series
Speaker

**“Getting Heard Above
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and Customers”**

12:00 p.m. to 2:00 p.m.

BUFFET LUNCH IN THE CLUB PLAZA

SALADS

- House Caesar Salad
- Greek Salad
- Refreshing Fruit Salad

ENTREES

- Rosemary Chicken with Italian Capicola
- Beef Stroganoff
- Fillet of Pacific Stripper
- Yukon Gold and Red Bliss Potatoes
- Chef's Selection of Seasonal Vegetables
- Artisan Dinner Rolls and Creamery Butter
- Chief's Assortment of Petite Pastries, Cookies, Bars and Brownies

BEVERAGES

- Soda
- Bottled Water
- Lead Tea
- Coffee

1:00 p.m.

LIVE RACING BEGINS

Restrooms: Use the elevator and go down one floor (2nd Floor). Turn left.

NOTES:

Winner's Circle Sponsors



Laura Pozzi

Closing Gifts Consultant

(626) 232-3384

cutcolove@gmail.com



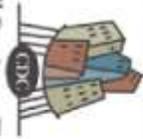
David Padilla

Regional Sales Director

(888) 264-0797

dpadilla@costar.com

Finish Line Sponsors



Small Business Finance

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odic Environmental & Energy

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Project Manager

(928) 533-2680
annnd@odicenv.com



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www.wfconstruction.com

Steve Micciche
Owner

(818) 421-3565
stevenm@wfconstruction.com

Starting Gate Sponsor



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Fax: (562) 684-4382
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Madelon@assetpreservation.com
(800) 262-1017
www.assetpreservation.com

We would like to thank our Master of Ceremonies today, Roy Blume, AAR Commercial Committee Chairman.

NOTES: