

Chapter Appraiser Guidance Committee (Regulation 8)

The Chapter Appraiser Guidance Committee shall consist of a Chair and at least three (3) other Committee members. The Committee Chair and at least two (2) Committee members must be Designated Members of the Appraisal Institute.

The Chapter President shall appoint the Committee Chair and any Committee members whose terms commence at the same time as the Chapter President's, subject to the approval of the Chapter Board of Directors. The Chair shall be appointed to serve a one (1) year term. The other Committee members shall be appointed to serve three (3) year staggered terms. Chapter Appraiser Guidance Committee Chair and Committee members are eligible to serve consecutive terms.

The duties of the Chapter Appraiser Guidance Committee shall be to:

- a) facilitate engagement and support of individuals seeking to enter the profession, are new to the profession; or are interested in Appraisal Institute membership; and
- b) arrange special programs and events in areas such as university relations, community outreach, professional development, Candidate guidance; and
- c) perform such other duties as may be assigned by the national Board of Directors and the Chapter.

Tips for Implementation:

This committee is intended to help drive activities such as membership recruitment/retention, university relations, women's initiative, professional development, candidate guidance, etc.

The following can be used as a roadmap for this committee. For example, the Women's Initiative Committee (WIN) has a document that helps chapters start a WIN program and the University Relations Committee has toolkit with brochures, flyers and presentations that can be used to promote and attract students to the profession. Both should connect to the Appraiser Guidance Committee.

It should not be the sole responsibility of the committee to do all the work but rather serve as the steering committee and work with chapter to be able to accomplish said duties.

Tools and Ideas for Implementation:

Chapters are encouraged to apply for a Chapter Innovation Grant to help offset the costs associated with any of these initiatives. Additional information and the application can be found at the end of this guidance tool (page 10).

Membership Recruitment

- Utilize reports in Chapter Portal (see Overview and Ideas Document on page 4)
- Consider residential appraiser focus
- Create a membership recruitment subcommittee or project team

Membership Retention

- Utilize reports in Chapter Portal - (see Overview and Ideas Document on page 6)

Women's Initiative

- Utilize *Women's Initiative Chapter Guide* developed by Women's Initiative Committee
- Create a women's initiative subcommittee or project team
- Utilize reports in Chapter Portal
 - Chapter Portal > Chapter Member Search > Export > Sort by Prefix

University Relations

- Utilize *How-To Guide* developed by University Relations Committee
- Create a university relations subcommittee or project team
- Utilize report in Chapter Portal
 - Click Chapter Member Search > Select fields for "Active" and "Student Affiliates"

Membership Status:

Member Type:

- Click Find Members

Community Outreach

- Connect individuals to the Appraiser Development Initiative and support those participating
- Connect individuals to PAREA and support those participating
 - Chapter Portal > Reports > AI Chapter PAREA Participants

A report is available displaying individuals who have *registered* for AI PAREA including member category, contact information, address, phone, registration date, completion date and cancellation date.
- Trainees

Professional Development

- Conduct Lunch and Learns (more information coming soon from national)
- Connect members to coaching/mentoring (more information coming soon from national)

Candidates

- Continue to provide candidate guidance as did the former Candidate Guidance Committee

Chapter Portal Reports: Overview

Chapter Member Recruitment

Join AI (webpage) Become very familiar with this page and the member categories available for recruitment. Learn about why members should join AI, what are the benefits? All this information can be found on our JOIN AI webpage and the member type webpages.

Chapter reports useful for recruitment

- **AI Chapter Licensing Information**
This report will show you members and non-members in your area that could be taking AI education (national and chapter offerings) and have entered license information in their AI account. Focus on the non-members in this document and reach out and introduce yourself and your chapter. Encourage them to join.
- **AI Prerequisite Checklists (6 different checklists available)**
This report will show you members and non-members in your area who have created prerequisite checklists for designation paths. Focus on the non-members in this document and reach out and introduce yourself and your chapter. Encourage them to join.
- **AI Chapter PAREA Participants**
Focus on the non-members in this document and reach out and introduce yourself and your chapter. Encourage them to join.

Example Campaign Ideas

Campaign Title: “Grow With Us: Your Path to Professional Recognition”

Campaign Goals

- Increase chapter membership by engaging non-members who are already interacting with AI education or designation pathways.
- Build relationships with potential members through personalized outreach and chapter-level engagement.

Target Audience Segments & Reports to Use

1. License Holders Taking AI Education

- Report: *AI Chapter Licensing Information*
- Action: Identify non-members who have taken AI courses and hold licenses in your state.
- Outreach Idea: Send a personalized email or letter introducing your chapter, highlighting local events, mentorship opportunities, and the benefits of joining AI.

2. Designation Pathway Participants

- Report: *AI Prerequisite Checklists*
- Action: Focus on non-members who have started a checklist for designation.

- Outreach Idea: Host a virtual “Designation Pathway Q&A” session with chapter Designated Members to answer questions and share success stories.

3. PAREA Participants

- Report: *AI Chapter PAREA Participants*
- Action: Reach out to non-members participating in PAREA.
- Outreach Idea: Invite them to a local chapter event or offer a “Welcome to the Profession” coffee chat with chapter leaders.

Sample Outreach Email Template

Subject: Welcome to Your Local AI Chapter – Let’s Connect!

Hi [First Name],

I noticed you’ve been engaging with the Appraisal Institute through [education/designation/PAREA], and I wanted to personally invite you to connect with our local chapter. We’re a community of professionals who support each other through education, networking, and mentorship.

Whether you're just starting out or looking to advance your career, our chapter offers resources and events that can help you grow. We'd love to welcome you to one of our upcoming meetings or answer any questions you have about membership.

Feel free to reach out or visit our website to learn more.

Warm regards,

[Your Name]

[Chapter Role]

[Contact Info]

Additional Chapter Ideas

- Mentorship Match Program: Pair new or prospective members with experienced Designated Members.
- “Bring a Guest” Events: Encourage current members to invite non-members to chapter meetings or socials.
- Social Media Spotlights: Feature stories of members who joined recently and their journey toward designation.
- Chapter Welcome Kit: Create a digital or physical packet with chapter info, upcoming events, and a personal welcome note.

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Chapter Member Retention

Chapter reports useful for retention

- **AI Chapter Join - Rejoin Report**

Contact these new members and welcome them to your chapter ask them what they need, invite them to chapter events, pair them with a chapter “buddy”, be creative.

- **AI Chapter Designations Date Earned Report**

These are new designees or have achieved additional designations. Call them and congratulate them, talk to them about chapter service.

- **Continuing Education (8 reports)**

These reports can help you identify educational needs related to AI CE cycles. These reports can help you market your education. Reach out to these members in the year their cycles end and ask if they need help or just touch base and remind them their cycles end in X year.

- *AI Chapter Needs BPE*
- *AI Chapter Needs USPAP*
- *AI Chapter Needs Fair Housing*
- *AI Chapter PAREA Participants*
- *AI Chapter Designated Member AI CE (Points)*
- *AI Chapter Designated Member AI CE (Hours)*
- *AI Chapter Associate Member AI CE (Points)*
- *AI Chapter Associate Member AI CE (Hours)*

- **Candidate Path Requirements (reports)**

These reports can help you identify educational needs related to AI CE cycles. These reports can help you market your education. Reach out to these members in the year their cycles end and ask if they need help or just touch base and remind them their cycles end in X year.

- *Candidate Path Requirements (2023-current) – 6 reports*
- *Candidate Path Requirements (PRIOR to 2023) – 6 reports*

Example Campaign Ideas

Campaign Title: “Stay Connected, Stay Inspired”

Campaign Goals

- Strengthen relationships with current members.
- Celebrate member milestones and achievements.
- Support members in meeting continuing education and designation requirements.
- Encourage chapter involvement and service.

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Targeted Outreach Strategies by Report

1. Welcome & Reconnect

- **Report:** *AI Chapter Join - Rejoin Report*
- **Action:** Identify new and returning members.
- **Outreach Ideas:**
 - Send a personalized welcome email.
 - Invite them to a “New Member Mixer” or virtual coffee chat.
 - Pair them with a chapter “buddy” for mentorship and networking.
 - Ask what they’re hoping to gain from membership and how the chapter can support them.

2. Celebrate Achievements

- **Report:** *AI Chapter Designations Date Earned Report*
- **Action:** Identify members who recently earned or added designations.
- **Outreach Ideas:**
 - Call or email to congratulate them.
 - Feature them in a chapter newsletter or social media spotlight.
 - Invite them to speak at a chapter event or join a committee.
 - Encourage them to mentor others pursuing designation.

3. Support Continuing Education

- **Reports:** *AI CE Cycle Reports* (USPAP, BPE, Fair Housing, CE Points/Hours)
- **Action:** Identify members nearing the end of their CE cycle.
- **Outreach Ideas:**
 - Send a reminder email with a list of upcoming chapter education offerings.
 - Offer a “CE Concierge” service—someone they can contact for help registering or planning.
 - Host a “CE Planning Workshop” to walk through requirements and options.

4. Support Candidates on the Path

- **Reports:** *Candidate Path Requirements (2023-current and prior)*
 - **Action:** Identify candidates progressing toward designation.
 - **Outreach Ideas:**
 - Send encouragement and offer chapter resources.
 - Host a “Candidate Roundtable” with Designated Members.
 - Share tips and timelines for completing requirements.
 - Offer study groups or peer support sessions.
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Sample Retention Email Template

Subject: We're Glad You're Here – Let's Stay Connected!

Hi [First Name],

We're thrilled to have you as part of our chapter community! Whether you're new, returning, or celebrating a recent designation, we want to make sure you feel supported and connected.

If there's anything you need—help with education planning, networking opportunities, or just someone to talk to—we're here for you. We'd also love to see you at our upcoming events and hear your ideas for making our chapter even stronger.

Let's keep the momentum going!

Warm regards,

[Your Name]

[Chapter Role]

[Contact Info]

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Additional Chapter Retention Ideas

- **Member Milestone Map:** Track and celebrate member anniversaries, designations, and CE completions.
- **Quarterly Check-In Calls:** Assign board members to call or email a few members each quarter.
- **Chapter Service Spotlights:** Highlight volunteer opportunities and recognize member contributions.
- **Feedback Loop:** Send a short survey asking what members value most and what they'd like to see more of.

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Chapter Innovation Grant Program

The Chapter Innovation Grant offers up to \$1,500 per year to help chapters connect with new members, appraisers, or underserved groups through innovative **new** activities.

Examples of eligible activities include:

- Membership campaigns
- University outreach
- Women's Initiative (WIN) programs
- Appraiser diversity activities
- Trainee placement support activities

To apply Chapter Executive Directors may submit a grant application at any time, copying their Chapter President. Applications should outline the proposed activities and the amount of funding requested. Chapters are welcome to submit multiple applications throughout the year, provided the combined total does not exceed \$1,500. You can find the application form here:

<https://chaptersupport.appraisalinstitute.org/hc/en-us/articles/44697827230107-Chapter-Innovation-Grant-Funding-Request-Instructions-and-Application>