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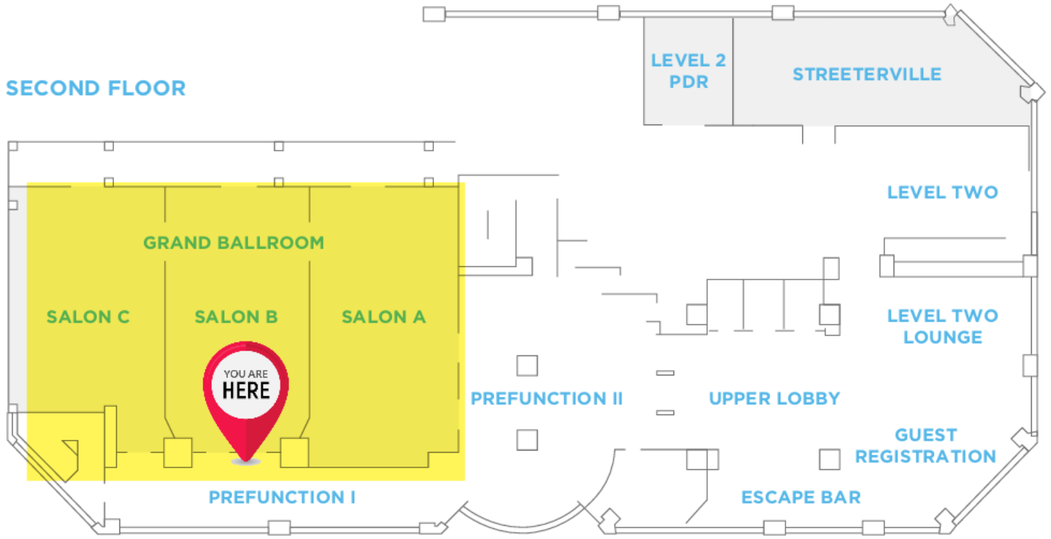
CLP | CHAPTER LEADERSHIP PROGRAM

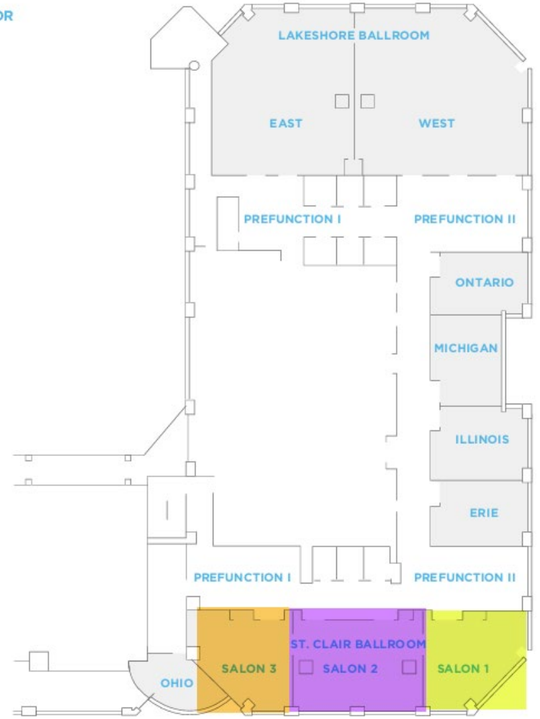
Welcome, chapter leaders.

Wifi and Map

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FLOOR PLANS





Today's Agenda

Thursday, October 22 – Chapter Operations, Member Engagement & Growth

Time	Title	Presenter/Facilitator
7:00 a.m.	Networking Breakfast	
8:00 – 8:30	Welcome & Where We're Headed Together in 2027	Ashley Johnson, MAI, SRA, President-Elect Jim Slawnikowski, Acting CEO
8:30 – 9:15	Keys to Your Presidency: Understanding Your Role, Associations and How to Run Productive Meetings	Scott Brody, CAE, IOM, Director, Chapter & Volunteer Relations
9:15 – 10:30	Keys to Your Presidency: How to Protect Your Chapter from Legal Problems	Christina Mitakis, General Counsel
10:30 – 10:45	Break	
10:45 – noon	Supporting Your Chapter Operations: ➢ Chapter Portal and Resources ➢ Marketing ➢ Finance ➢ Government Relations	Diana Diaz, Senior Specialist, Chapter Relations Rachel Morrison, Director of Marketing Elizabeth Kramer, Controller Brian A. Rodgers, Senior Manager of Federal Affairs
noon – 1:00	Group Photo & Networking Lunch	
1:00 – 1:45	Industry Trends and the Future of the Profession: Foundation for Growth	Mark Vella, Valcre, Director of Valuation
1:45 – 2:45	Engaging Your Members and Appraisal Community	LaJuan Campbell, Senior Manager, Volunteer Relations Vanessa Hall, MAI, AI-GRS, Chair, Women's Initiative Committee Sharon L. Malane, MBA, Director, Strategic Inclusion and Partnership Development Carrie Vann, Director of Membership
2:45 – 3:00	Break	
3:00 – 3:45	Introducing New Tool for Chapter Success: Professional Coaching	Dr. Daralee Barbera, President of Diversified Professional Coaching (DPC), LLC
4:00 – 5:00	*Membership Engagement: Collaborative Deep Dive and Takeaways*	

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Welcome & Where We're Headed in 2027

Ashley Johnson, MAI, SRA, President-Elect
Jim Slawnikowski, Acting CEO

Chapter Leadership Program

Opening Session | Chicago | October 22-23, 2026

You showed up.

During a time when showing up has not been easy.

WHO'S UP HERE

Two new people in two new seats

Ashley Johnson, MAI, SRA

2026 President-Elect

- 20 years of appraisal experience across a wide range of property types in Indiana
- Specialize in appraisals for use in right-of-way acquisition, lending, estate planning and litigation
- President, First Appraisal Group, Incorporated, a small real estate valuation and consulting firm in Bloomington, Indiana
- MBA, Kelley School of Business, Indiana University (2026)
- BS Public Affairs, Indiana University (2008)
- MAI (2013), SRA (2022), R/W-AC (2022), ASA (2025)

Jim Slawnikowski

Acting CEO

Joined the Appraisal Institute in 2024 as the Director of Operations. Spent the first 12 months learning the way the organization ran operationally. In May of 2026 appointed Acting CEO.

-BA Business Management, Marketing, Dominican University (2013)
-Analyst, Strategist, Marketeer, Business Owner, & Collaborator.

The deal

We bring energy, a fresh set of eyes and a willingness to make decisions. You bring the history, the relationships and the truth about what is actually happening in your chapters. We need both. Neither one works alone.

NAMING IT

Four kinds of change, all at once

01 Structure

A 45-day notice is out on the Amended and Restated Bylaws: 11 Directors instead of 27 to 29, a new Regional Council, three Officers. Comments are due November 1. No changes are proposed to Chapters.

02 Landscape

Membership is 12,469 and the ten-year trend is down. More than 5,100 members are 60 or older. UAD 3.6 lands November 2, and AVMs, hybrids and AI tools are reshaping the work.

03 Process

A new sign-in platform, 33 hosted chapter websites, chapter forms moving to HubSpot, Vista Social for chapters, a redesigned website in January. Good changes, and a lot of them in one year.

04 Finances

Three years of operating deficits, each covered from reserves. The National reserve covers 4.2 months of expense, down from 14.6 in 2023. The 2027 budget has to close the gap, not just narrow it.

Any one of these would be a lot. All four at once is a heavy lift, and most of that lift has landed on volunteers.

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One word.

How has this year felt in your chapter?

WHERE WE ARE

Change is the event. Transition is what people go through.

Ending	The middle	New beginning
The old way stops working, or stops existing.	**The old way is gone. The new way isn't working smoothly yet. Everyone feels a little lost.**	The new way starts to feel normal. People stop translating.

This is where we are

William Bridges called the middle the neutral zone. It's uncomfortable, and it's also where the most creative work happens, because this is when the new normal gets shaped instead of just received. **If you've felt disoriented this year, you're not doing it wrong. You're in the middle, with the rest of us.**

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Grace to try.
Grace to fail.
Grace to try again.

WHAT WE'RE ASKING

Small experiments. Fast learning. No blame.

01 Try one thing

A new event format, a different way to recruit volunteers, a partnership you've been curious about. Treat it as an experiment. Small is fine. Small is better, actually.

02 There's money for it

30 Chapter Innovation Grants have been awarded so far this year. If your chapter hasn't applied, the details are in the Chapter Toolkit on the website.

03 Share what you learn

An experiment that doesn't work isn't a failure. It's data. Tell us what happened so the chapter across the country doesn't have to learn the same lesson the hard way.

Our commitment. When you try something new in good faith, National has your back. No blame. We'll ask what you learned, and we'll share it so other chapters can use it.

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WHAT ISN'T CHANGING

The Appraisal Institute empowers valuation professionals through community, credentialing, education, body of knowledge and ethical standards.

Every structure, process and budget we're working on is a tool. The mission is the reason.

WHERE WE'RE HEADED

Three things we're building toward

01

Chapters spend more time on members and less on administration

Hosted chapter websites, one place for chapter resources instead of three, forms in HubSpot, and consistent marketing support for every chapter.

02

A budget that closes the gap, not just narrows it

Revenue is growing: education up 9%, PAREA up 2.7x, Publications nearly doubled. The 2027 budget is where that growth has to outrun expenses.

03

People who come in the door stay connected

673 new joins and readmissions this year, Student Affiliates up 44%, 113 AI PAREA graduates and about 250 more enrolled. The work now is keeping them with us from school into the profession and on to designation.

That's the destination. We won't get there in a straight line, and a lot of the learning will come from you.

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THE DEAL

Our promises. Our asks.

Three promises from us

- **We'll tell you the why, not just the what.**

  If we ask you to change something, you'll know the reason.

- **We'll tell you sooner.**

  You'll hear about big changes early and directly. If we don't have the answer yet, we'll say so.

- **We'll listen, and we'll act.**

  When your feedback changes a decision, we'll tell you that too.

Three asks of you

- **Stay in the conversation.**

  Start with the 45-day notice. Read it,and get your comments to your Directors or 45daynotice@appraisalinstitute.org by November 1.

- **Try one new thing in your chapter this year.**

  One experiment. Small is fine.

- **Take care of yourselves and each other.**

  This is meant to be meaningful, not crushing. If you're running on empty, say so and share the load.

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ONE ASK WE CAN ANSWER TODAY

Your starting point: lists in the Chapter Portal

AI PAREA participants and graduates

Names, contact information, program status and AI membership status.

Chapter Portal › Reports › **AI Chapter PAREA Participants**

Student Affiliates

Includes the Do Not Renew flag.

Chapter Portal › Member Search › Student Affiliates (Active) › **Export**

Candidates and the path they're on

One report per designation path. Available since 2013.

Chapter Portal › Reports › **Candidate Path Requirements**

Everyone who joined or rejoined this year

Category and join date.

Chapter Portal › Reports › **AI Chapter Join-Rejoin Report**

Members who lapsed in September

Filter on termination date for the September cycle.

Chapter Portal › Member Search › **Terminated Members**

Every report gives you name, email, category, chapter and the date that matters, and each chapter sees only its own members. **The full guide to the membership reports is on the Chapter ED SharePoint.**

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ON THE CALENDAR

Dates that matter to your chapter

Oct. 29	Information session on the 45-day notice, open to all members
Nov. 1	Comments due on the proposed Amended and Restated Bylaws
Nov. 2	UAD 3.6 implementation
Nov. 10	Final UAD 3.6 premiere, the Cost Approach seminar with the Hoosier State Chapter, and the last Countdown webinar
Nov. 12-13	Q4 Board meeting: the bylaws proposal and the 2027 budget
Dec. 1	Nominations due for the Appraisal Institute Awards
January	Redesigned AI website launches
April 26-28	Annual Conference 2027, New Orleans. Region meetings on April 26.

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The change isn't happening to us.
We're the ones making it. Together.

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Understanding Your Role, Associations and How to Run Productive Meetings

Scott Brody, CAE, IOM, Director, Chapter & Volunteer Relations

CLP CHAPTER LEADERSHIP PROGRAM

Welcome

- **What the Chapter Leadership Program *IS***
  - **All of us coming together to work collectively to help set you up for success**

- **What the Chapter Leadership is *not***
  - **Training on how to be a Chapter President**

Goal:

- **Leave today feeling more prepared, comfortable and supported by AI staff, leadership and your peers as you prepare to transition into 2027**

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Keys to Your Presidency

- “Association 101”
- Role of the Chapter President
- Presiding Over a Meeting and Meeting Tips
- What Should You do Next?

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Not-for-Profit is a designation.

The state in which the organization is registered grants not-for-profit status;
authority is granted by the state to the board to govern in accordance with law.

Appraisal Institute Chapters hold 501c6 tax status with the IRS (trade organization...not a charity)

One of the biggest assets of a not-for-profit is the good name of the organization.

We do hold elections...we are not a representative democracy.

Why (Board) + What (Board/Staff) + How (Staff) = winning equation

Chief Executive Officer of the Chapter per Regulation 8.
(Think “Chairman of the Board” not “President of the United States”).

- **Preside over 4 board and 4 membership meetings**
  - Minimum of four Chapter Board meetings each year
  - Minimum of four regular membership meetings each year unless Regional Chair permits fewer
    - Meetings can be held in person or by interactive technology.
- **Committee Appointments**
  - Chapter Board approves appointments
- **Attend Region Meetings**
  - **Please Note:** If Chapter President or Chapter Representatives cannot attend meetings, the President must contact alternates in ranked order.
- **Adhere to Bylaws, Regulations, Policies**
  - **Example: Nomination/Elections**
    - Regulation No. 8 states that chapters shall hold elections prior to June 30.
      - All officers serve 1-year terms
      - Immediate Past President serves as Nominating Committee Chair
- **Carry out the policies and programs adopted by the Chapter Board of Directors**

Why are efficient and effective meetings so crucial?

- Board's job is to provide insights on behalf of members and appraisal community
- Board's job is make decisions and take action on behalf of the chapter
- Meetings, particularly Board meetings, are the forum for these discussions and decision making
- As society and technology have changed, so have meetings

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Presiding Over a Meeting: Starts with the Agenda

- **Identifies reports and discussion topics for the meeting**
- **Sets start and end times**
- **Distribute in advance of meeting**
- **Benefits**
  - ✓Helps individuals prepare
  - ✓Helps organize the meeting and keep it on track
  - ✓Enhances quality of meeting
  - ✓Helps meeting end when scheduled

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Quorum

- **Quorum is the minimum number of members who must be present for business to be validly transacted**
- **Protects against unrepresentative action in the name of the body by an unduly small number of persons**
- **Board meetings:**
  - ✓ 50% of voting members
  - ✓ Board members may not attend a meeting by proxy nor vote by proxy
- **Chapter membership meetings:**
  - ✓ AI Professionals belonging to Chapter who are present and voting
- **Committee meetings:**
  - ✓ Majority of committee members

- **Meetings at which quorum is initially present may continue to transact business if any action taken is approved by the greater of:**
  - **a majority of the required quorum, or**
  - **a majority of remaining individuals**

- **Business cannot be transacted if quorum is not initially present. If no quorum, meeting must end**

Chapters must follow Robert's Rules of Order. The purposes of Robert's Rules are to help:

- ✓ Ensure that business is transacted efficiently
- ✓ Protect right of majority to decide
- ✓ Protect right of minority to be heard
- ✓ Maintain order

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Action By Motion

- **Motions are the means by which business is brought before the body**
- **Motion is a formal proposal by a member, at a meeting, that the body take a certain action**

Making a Motion

- **I move to approve the chapter budget for 2024 as presented**
  - ✓ Second required
  - ✓ Discussion

- **I move that the motion be amended to add $5,000 to update the website**
  - ✓ Second required
  - ✓ Discussion

- **If no second, motion does not proceed**

- **Complicated or involved motions are best prepared in advance of meeting if possible**

Voting

- All those in favor of the amendment say “Aye.” All those opposed say “Nay.” Abstentions?
- All those in favor of the amended motion say “Aye.” All those opposed say “Nay.” Abstentions?
- Chair votes only to affect the result (i.e. make or break a tie, make a majority or supermajority)

Chair Voting

- Chair’s role: impartially facilitate meeting, ensure fair play; establish trust of Board members
- No reason for Chair to vote when it will not affect the outcome
- Sample Votes: 6-3, 4-4, 5-4

Other Motions

- **To call the question.**
  - ✓This requires a 2/3 vote and will cut off debate.
- **To limit debate to X minutes.**
  - ✓This requires a 2/3 vote.
- **To table.**
  - ✓For use only when an emergency arises and other business must be put aside.
- **To postpone until time certain.**
- **To withdraw a motion**
  - ✓If withdrawn by body, motion is not recorded
- **To vote by secret ballot**

Unanimous Consent or Consensus

- More informal as there is no motion
- Best for routine business that does not require debate
- No maker, seconder of vote required
- Chair needs to announce what the Chair believes is the consensus and let anyone object.
  - ✓ If someone objects, a motion is required to undertake action.

- **Confidential Matters**
  - ✓ Examples: organizational strategies, salary/performance, competitive information that we would not want in the hands of our competitors
- **Content of discussion must not go beyond those present unless agreed otherwise**
- **Board can decide who can be present**

Efficient Meetings

- Chair calls on members to speak
- Members should address comments to the Chair
- Conversations should not occur between members, or the meeting can get out of control
- Limit comments to issue at hand
- Avoid repetitiveness.
  - ✓ If a specific point has been made, ask others not to repeat
- Only members of the Board can speak.
  - ✓ Others do not have speaking privileges, unless the Chair decides subject to the ultimate authority of the Board

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Use of Technology in Meetings

- **Chapter, Board and Committee meetings can occur via “interactive technology”**
  - ✓ Telephone, Zoom, Microsoft Teams, etc.
- **Those participating must be able to “communicate with one another.”**
- **Any recording of session should be agreed to by participants.**
  - ✓ **Do not record executive sessions**
- **Chats should not include confidential information**

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- **A written record of what was done, not what was said or opinions**

- **Minutes should be short and should list:**
  - ✓Kind of meeting (regular, special)
  - ✓The name of the body
  - ✓Date, time, and place of meeting
  - ✓Who was present and absent
  - ✓Whether previous meeting minutes were approved
  - ✓Motions – maker, seconder, disposition

- **Consensus items**

- **Notation of the subject matter of a report**

- **Time meeting commenced and adjourned**

Action Without a Meeting

- Non-controversial issues
- Requires unanimous written consent
- Every person on the Board must vote in writing in favor
- There can be no abstentions or members not voting
- Strict requirements because best decisions usually are made with discussion and debate

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What to do Next?

- Today and Tomorrow
  - Listen
  - Reflect - Question
  - Plan

- Following CLP
  - Listen
  - Reflect - Question
  - Plan

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Keys to Your Presidency: Running Productive Meetings and How to Protect Your Chapter from Legal Problems

Christina Mitakis, General Counsel

Mission, Core Values, Goals

- **The Appraisal Institute's mission is to empower valuation professionals through community, credentialing, education, body of knowledge and ethical standards.**

- **The Appraisal Institute is:**
  - ✓ Dedicated to excellence, professionalism, ethics and integrity.
  - ✓ Committed to leadership and innovation.
  - ✓ Devoted to an inclusive and welcoming community.

- **Four Goals**
  - ✓ The Appraisal Institute will protect and improve the value of affiliation.
  - ✓ The Appraisal Institute will provide leadership toward a unified and inclusive profession with diverse perspectives.
  - ✓ Appraisal Institute professionals will be consistently sought out by users of valuation services.
  - ✓ The Appraisal Institute will improve the diversity of its affiliated professionals.

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Chapter Directors' Fiduciary Duties

- **Duty of Care**
  - ✓ Be fully informed, diligent, and attentive to the issues. Based on that care, make decisions that a prudent person would make.

- **Duty of Obedience**
  - ✓ Act in accordance with the AI's Bylaws, Regulations, Policies and Procedures.
  - ✓ Act in accordance with state and federal laws.

- **Duty of Loyalty**
  - ✓ Decide what is best for the organization as a whole and not what is in your personal interest or someone else's interest.
  - ✓ Consider member input but must not dictate your decision.

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Conflicts of Interest

- **Conflicts of Interest and Potential Conflicts of Interest**
  - ✓ Disclose
  - ✓ Recuse self if appropriate from deliberations and/or voting
  - ✓ Board can vote to recuse individual if necessary

- **Examples:**
  - ✓ President considers appointing an individual who is a leader of a competing organization as committee chair.
  - ✓ Awarding a contract for web design to Board member's spouse, who has a web design business.
  - ✓ Chapter Education Committee Chair should ensure that instructor assignments are in the best interest of the Chapter (e.g., price, quality).
  - ✓ Chapter Nominating Committee (CNC) cannot nominate one of its own. Be cognizant of possible relationships between CNC members and potential nominees (e.g., business partners, employer/employee).

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Third Party and Chapter Developed Education

- Offering Chapter Developed and Third-Party Educational Programs involve special legal issues.
- Chapter Developed Educational Programs cover topics unique to the local area and are created, developed, organized and offered by the Chapter.
- Third-Party Educational Programs have not been developed by the Appraisal Institute, its Regions or its Chapters. Typically, a Third-Party Educational Program is one where a Third Party uses the Chapter as a vehicle through which to sell and offer an educational program that the Third Party owns or licenses.
- Chapters are responsible for obtaining state and any other approvals for CE credit. Ensure that advertisements are clear as to whether state and AI continuing education credit has been approved.
- Refer to the Education Network Manual for other requirements

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Third Party and Chapter Developed Education Cont.

- Ensure that handouts, slides and promotional materials do not suggest any AI endorsement of speaker or content. The content likely is not part of AI's Body of Knowledge
- Do not place AI logo on third party or speaker materials.
- Use disclaimers in Education Network Manual.
- Ensure clarity as to who owns education materials through an agreement and get permission to copy or post materials owned by others.
- Instructors cannot promote or sell their own (non-AI) products and services before, during or after program.
- If recorded, ensure Chapter has signed written permissions from speakers and attendees.

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Apparent Authority – can/should EDs sign agreements?

- Actual authority should only exist with the Chapter Board of Directors (collectively), the Chapter President and other officers subject to the national bylaws, Chapter bylaws and regulations.

- When third parties may reasonably conclude that a member, employee or contractor has authority to act on behalf of the Chapter and they do not have such authority:
  - ✓ The Chapter can be bound or responsible as a result.

- Important to establish protections to avoid perception of apparent authority:
  - ✓ Limit individuals' authority to speak on Chapter's behalf.
  - ✓ Strict parameters on contracting authority and entering into written or verbal commitments.
  - ✓ Limit use of Chapter name/logo.
  - ✓ Limit use of appraisalinstitute.org email addresses.

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Marketing

- **Advertising should be truthful and not misleading or deceptive**
- **Avoid any assurances and guarantees; focus on designation requirements instead**
  - ✓ Stay away from using words like “ensure,” “guarantee,” “reliable,” “experts”
- **CAN-SPAM establishes requirements for commercial email messages, which are emails primarily intended to advertise or promote a commercial product or service**
  - ✓ Don’t use false or misleading headers
  - ✓ Identify message as an ad
  - ✓ Include a physical postal address (may be a P.O. Box)
  - ✓ Enable recipients to opt-out and honor such requests.
  - ✓ Ensure third parties providing email service for Chapter do the same

Websites

- **Microsites**
  - ✓ Easier to keep information up-to-date (e.g., admissions requirements, benefits).
  - ✓ Consistent with AI branding
  - ✓ Helps ensure that the site has proper legal language like terms of use of the website, disclaiming liabilities, privacy.
  - ✓ Event Code of Conduct
- **Ensure Chapter has the right to use others' work (including photographs), trademarks or materials**
- **Ensure job boards have proper disclaimers**
- **Include antitrust policy**
- **Link to National website**
  - ✓ Designation requirements
  - ✓ Information on joining AI
  - ✓ Find an Appraiser
  - ✓ National meetings and events
  - ✓ Online education
  - ✓ 45-Day Notices
  - ✓ Professional Practice resources

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Branding

- **Use of AI branding**
  - ✓ Enhances consistency of AI image
  - ✓ Strengthening of AI brand

- **Chapters must include Chapter name in conjunction with new logo**
  - ✓ **Chapters have been provided with Chapter-specific logos**
  - ✓ **Use Chapter-logo on materials, website, communications**

- **Chapters may use designation emblem logos**

- **Regulation No. 5 for updates**

- **Brand Guide**

Intellectual Property

- Appraisal Institute's intellectual property (name, logo, designations, designation emblems, educational material, publications, etc.) is one of its most valuable and important assets.

- Appraisal Institute name, logo, and designations are registered trademarks owned by the Appraisal Institute.

- Protect the copyrighted or proprietary material (educational material, exams, publications) of the Appraisal Institute and the Chapter.
  - ✓ Do not upload proprietary information into generative artificial intelligence platforms without a license.
  - ✓ Limit access to material

- If Chapter wishes to use intellectual property of others, ensure that Chapter has the right to use material (by license, agreement, etc.).

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Events/Membership Lists

- Consent for use of images (likenesses, photographs, etc.) at Chapter events
- Consents may be handled through event registration process
- Sharing event attendee information with vendors or sponsors
  - ✓ Should have signed sponsorship agreement limiting use of information
  - ✓ Obtain opt-in consent through registration process
- Chapter membership lists are an important and valuable asset – protect it!
- Limit or avoid sharing membership lists with outside parties
  - ✓ Consent
  - ✓ Spamming
  - ✓ National affinity agreements contain strict terms

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Event Code of Conduct

- **Importance of Welcoming Environment**

- **Event Code of Conduct (adopted April 2026)**
  - ✓ **Applies to all AI events, meetings, conferences, educational offering, etc. (Chapter, Region, National)**
  - ✓ **Requires events to be respectful, harassment-free environments for all participants**
  - ✓ **Zero-tolerance for any form of discrimination, harassment or bullying in connection with any AI event for any reason**

- **Permits chapters to take appropriate action, including immediate removal from the AI event without refund and prohibiting attendance or participation at future AI events.**

- **Located on the AI website and on chapter microsites**

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Cyberattacks

- **Attempts to steal personal information**
- **If data breach, federal and state laws may require notification and other steps**
- **Cyberattacks: ransomware, spoofing, malware**
- **Often human manipulation, not digital flaws (social engineering)**
  - **Phishing**
  - **Vishing (voice phishing)**
  - **Smishing (SMS text phishing)**
- **Deepfakes and identity deception**
- **Constant vigilance is key**
  - ✓ Constantly review, update and strengthen security, implement multi-factor authentication (MFA)
  - ✓ Maintain regular backups
  - ✓ Check spelling of email addresses and websites, "hover" over links

- **When in doubt, pick up the phone and verify!**

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Unrelated Business Income Tax (UBIT)

- **Appraisal Institute is a 501c6 tax exempt organization**
- **Tax exempt purposes include education, research and professional association purposes related to appraisal services**
- **Unrelated Business Income Tax (UBIT) can be imposed on income received from business or activity that is unrelated to tax-exempt purpose**
- **In addition to getting taxed on this income, too much UBIT can jeopardize tax-exempt status**
- **Corporate sponsorships – OK but with caveats:**
  - ✓ Avoid possible characterization that sponsorship is marketing for sponsor or sponsor's products or services
  - ✓ Can list sponsor name, logo, contact information, but **no** endorsement, qualitative statements or competitor comparisons.
  - ✓ If sponsor products are promoted or there is any endorsement such that revenue may be characterized as marketing, Chapter may be subject to UBIT

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Chapter Workers

- **Some Chapters use employees to provide services to operate chapters; others use independent contractors.**
- **Consult with attorney familiar with your state and local law.**
  - ✓ Different states can have very different employment laws (e.g., CA)
  - ✓ Impact of new technology (artificial intelligence)
- **Employees**
  - ✓ Review and update job descriptions
- **Independent Contractors (e.g., association management companies)**
  - ✓ Review and update current agreement
- **Treat all workers (and everyone else) with respect and dignity**
- **More information in Chapter Support Portal (sample documents)**

Insurance

- **National's insurance policies include coverage for Chapters and Chapter Boards of Directors (general liability, property, hired/non-owned auto, crime, workers' compensation for Chapter employees only).**

- **Coverage depends on terms of insurance and facts involved.**

- **Consult with insurance professional for other coverages that may be appropriate for Chapter (e.g., event cancellation insurance).**

- **Chapters are encouraged to require that independent contractors providing goods or services to Chapters have their own insurance with sufficient limits.**
  - ✓ **Vendor agreement**

- **Certificates of Insurance**
  - ✓ Submit requests via the Chapter Support Portal (Zendesk)

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Welcoming Environment

The Appraisal Institute's goal is to provide an organizational environment for its professionals that is free from discrimination or harassment on the basis of race, color, religion, national origin, sex, marital status, age, sexual orientation, gender identity or expression, or disability. Harassment can include derogatory statements, conduct or treatment relating to an Appraisal Institute Professional's race, color, religion, sex, marital status, age, sexual orientation, gender identity or expression, or disability.

Contacts

Christina Mitakis
General Counsel
312.335.4402
cmitakis@appraisalinstitute.org

THANK YOU!

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Supporting Your Chapter Operations:

Chapter Portal and Resources

Diana Diaz, Senior Specialist, Chapter Relations

Marketing

Rachel Morrison, Director of Marketing

Finance

Elizabeth Kramer, Controller

Government Relations

Brian A. Rodgers, Senior Manager of Federal Affairs

Chapter Portal and Resources

Diana Diaz

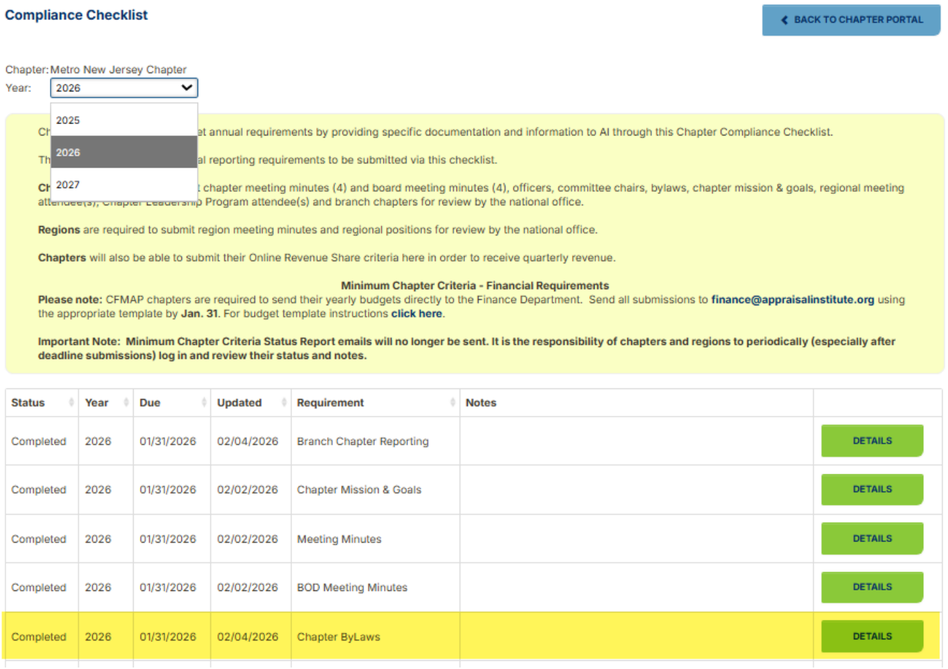
Senior Specialist, Chapter Relations

- Regulation 8 and Chapter Bylaws
- Chapter Portal
- Reports
- Member Search
- Chapter Support Portal
- Chapter FYI
- Chapter Leadership Operations Handbook
- Chapter Innovation Grant
- Chapter Appraiser Guidance Committee
- Chapter Websites
- Additional Resources

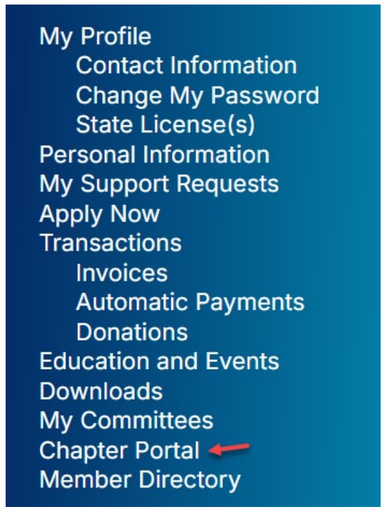


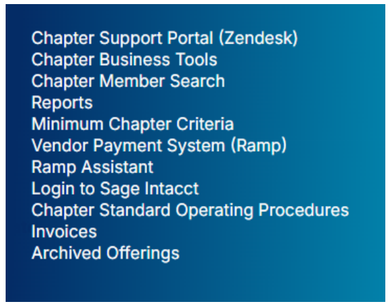
Locating you Chapter Bylaws:

Chapter Support Portal (Zendesk)
Chapter Business Tools
Chapter Member Search
Reports
Minimum Chapter Criteria
Vendor Payment System (Ramp)
Ramp Assistant
Login to Sage Intacct
Chapter Standard Operating Procedures
Invoices
Archived Offerings



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Chapter Portal

Authorized Users: Chapter officers, including President, Vice President, Secretary, Treasurer, and Education Chair, and chapter staff have access to the portal. Authorized Users should access the Chapter Portal through their My AI Account page. If a User is authorized to view more than one Chapter/Region, they will see a dropdown with a list of authorized Chapters/Regions and choose which Chapter or Region they wish to go to.

- ## Chapter Business Tools

This page houses resources that assist chapters. You can find reports, policies and procedures, trainings, marketing resources and governance information.

- ## Chapter Member Search

Allows chapter leaders to search, find and export active, suspended and terminated professionals and members of their chapter.

- ## Reports

Various education, membership and financial reports

- ## Minimum Chapter Criteria

This is where chapters report their annual requirements.

- ## Vendor Payment System (Ramp) and Ramp Assistant

Ramp link to access for current approvers.

- ## Login to Sage Intacct

Inacct link to access financial statements.

- ## Chapter Standard Operating Procedures

The intent of the Chapter Standard Operating Procedures (SOPs) are to guide and assist with the submission process for Education Offerings and Minimum Chapter Criteria.

- ## Invoices

Chapters can view and pay education material invoices.

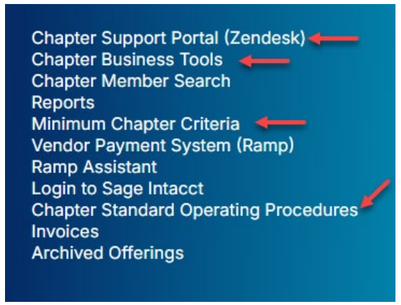
- ## Archived Offerings

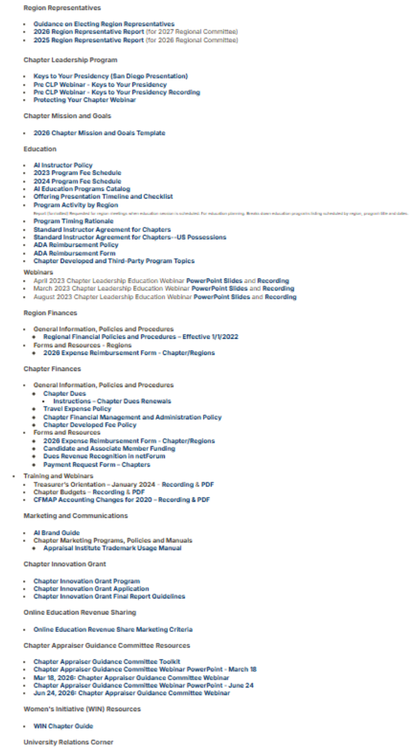
Archived offerings are any offering created after 10/1/2019 and greater than one year based on the offering's end date.

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CLP CHAPTER LEADERSHIP PROGRAM

Chapter Portal Continued





Region Representatives

- Guidance on Electing Region Representatives
- 2026 Region Representative Report (for 2027 Regional Committee)
- 2025 Region Representative Report (for 2026 Regional Committee)

Chapter Leadership Program

- Keys to Your Presidency (San Diego Presentation)
- Pre CLP Webinar - Keys to Your Presidency
- Pre CLP Webinar - Keys to Your Presidency Recording
- Protecting Your Chapter Webinar

Chapter Mission and Goals

- 2026 Chapter Mission and Goals Template

Education

- AI Instructor Policy
- 2023 Program Fee Schedule
- 2024 Program Fee Schedule
- AI Education Programs Catalog
- Offering Presentation Timeline and Checklist
- Program Activity by Region

Report Completed Requested for region meetings when education session is scheduled. For education planning. Breaks down education programs being scheduled by region, program title and dates.

- Program Timing Rationale
- Standard Instructor Agreement for Chapters
- Standard Instructor Agreement for Chapters--US Possessions
- ADA Reimbursement Policy
- ADA Reimbursement Form
- Chapter Developed and Third-Party Program Topics

Webinars

- April 2023 Chapter Leadership Education Webinar PowerPoint Slides and Recording
- March 2023 Chapter Leadership Education Webinar PowerPoint Slides and Recording
- August 2023 Chapter Leadership Education Webinar PowerPoint Slides and Recording

Region Finances

- General Information, Policies and Procedures
  - Regional Financial Policies and Procedures - Effective 1/1/2022
- Forms and Resources - Regions
  - 2026 Expense Reimbursement Form - Chapter/Regions

Chapter Finances

- General Information, Policies and Procedures
  - Chapter Dues
    - Instructions - Chapter Dues Renewals
  - Travel Expense Policy
  - Chapter Financial Management and Administration Policy
  - Chapter Developed Fee Policy
- Forms and Resources
  - 2026 Expense Reimbursement Form - Chapter/Regions
  - Candidate and Associate Member Funding
  - Dues Revenue Recognition in netForum
  - Payment Request Form - Chapters
- Training and Webinars
  - Treasurer's Orientation - January 2024 - Recording & PDF
  - Chapter Budgets - Recording & PDF
  - CFMAP Accounting Changes for 2020 - Recording & PDF

Marketing and Communications

- AI Brand Guide
- Chapter Marketing Programs, Policies and Manuals
  - Appraisal Institute Trademark Usage Manual

Chapter Innovation Grant

- Chapter Innovation Grant Program
- Chapter Innovation Grant Application
- Chapter Innovation Grant Final Report Guidelines

Online Education Revenue Sharing

- Online Education Revenue Share Marketing Criteria

Chapter Appraiser Guidance Committee Resources

- Chapter Appraiser Guidance Committee Toolkit
- Chapter Appraiser Guidance Committee Webinar PowerPoint - March 18
- Mar 18, 2026: Chapter Appraiser Guidance Committee Webinar
- Chapter Appraiser Guidance Committee Webinar PowerPoint - June 24
- Jun 24, 2026: Chapter Appraiser Guidance Committee Webinar

Women's Initiative (WIN) Resources

- WIN Chapter Guide

University Relations Corner

Requirements and Updates:

- **Minimum Chapter Criteria**
  - Meeting minutes from 4 membership and 4 board of directors meetings
  - Chapter Leadership Program participation
  - Regional Meetings participants
  - Chapter officers and committee chairs
  - Annual mission and goals
  - Reporting of any branch chapters
  - Current chapter bylaws
  - Approved annual budget
  - **Chapters must maintain a website**
- **Optional: Details can be found in** Online Education Revenue Share – Chapter Support Center
  - Online Education Revenue Share Marketing Criteria (quarterly reimbursement)
- **Chapter Business Tools**

PHASING OUT.

- **Chapter Standard Operating**

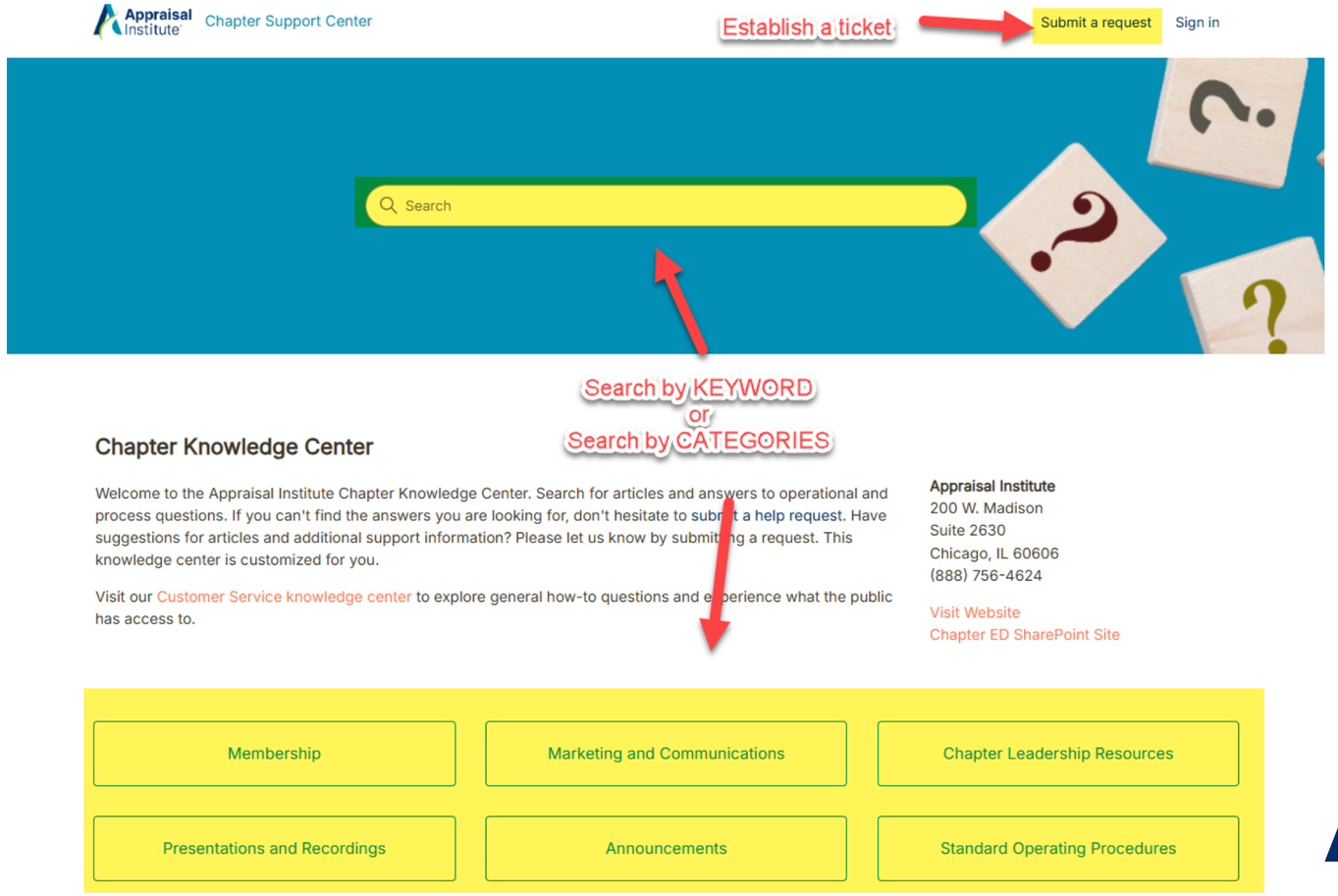
PHASING OUT.

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Chapter Support Portal (Zendesk):

Your NEW primary hub for chapter support and resources

- Chapter Support Portal (Zendesk)
- Chapter Business Tools PHASING OUT
- Chapter Member Search
- Reports
- Minimum Chapter Criteria
- Vendor Payment System (Ramp)
- Ramp Assistant
- Login to Sage Intacct PHASING OUT
- Chapter Standard Operating Procedures
- Invoices
- Archived Offerings



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Support ticket system for chapter-related assistance.

The Chapter Support Portal will now serve as the new "Chapter Business Tools," providing a more intuitive and streamlined way to locate the resources, forms, templates, policies, and tools you need to support chapter operations.

Rather than searching through multiple platforms, the Support Portal brings together links to materials housed both on the website and within the AI Chapter EDs SharePoint, making it easier to find what you're looking for.

Best Practices:

- **Submit requests directly through the support portal**
- **Use General/Other when unsure of category**
- **Avoid emailing shared departmental inboxes for support issues**

Target Response Times:

- **Urgent:** within 2 business hours
- **High:** 1-2 business days
- **Normal:** 5-7 business days
- **Low:** As time allows

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Chapter FYI

The second Monday of each month, Chapter FYI is sent to the following chapter leaders:
President, Vice President, Secretary, Treasurer, Executive Director, Chapter Appraiser Guidance Committee Chair, Education Chair + the Board.

Each issue includes important information and updates pertaining to AI chapter leaders.



Important Dates & Deadlines

Chapter Leadership Program (CLP). Learn more. | **October 22-23**

Board of Directors 4th Quarter Meeting, Chicago, IL. | **November 12-13**

Future Meetings/Events/Etc.

DECEMBER 31, 2026
2026 Chapter Innovation Grant submission deadline. Learn more.

DECEMBER 31, 2026
Q4 Online Revenue Share submission deadline. Learn more.

JANUARY 1, 2027

MAY 26-28, 2027
Leadership Development and Advisory Council (LDAC), Washington, D.C.



Final Reminder: CLP Registration and Hotel Information

While the deadline has passed, the hotel is accepting additional reservations in our block on a limited basis. Please reach out if you're unable to book on the included link and we will do our best to assist.

To book your room online please use this AI-specific link.

If you have not done so, register here for the 2026 Chapter Leadership Program (CLP) being held Oct. 22-23 in Chicago, IL. Learn more.

New Announcements

Help Us Recognize Excellence: 2027 Award Nominations Are Open
Do you know an Appraisal Institute member whose leadership, service or contributions deserve national recognition? Nominations are now open for the **2027 Appraisal Institute Awards**:

- J. Scott Robinson Lifetime Achievement Award

Membership Updates

Reminder: Important: 2027 Dues Renewal Timeline Has Changed

The 2027 dues renewal cycle is underway, with renewal notices **beginning in October**. Please note that the timeline for dues and fees suspensions and terminations has changed and is earlier than in previous years. We encourage chapter leaders to share these important dates with members and utilize the Stay Connected in 2027 - Chapter Campaign (AI Chapter EDs SharePoint) resources.

Key 2027 Renewal Dates

- **January 6, 2027**: Dues and fees payment deadline
- **March 31, 2027**: Last day to enroll in an installment plan
- **April 1, 2027**: Suspensions begin for unpaid dues and fees
- **June 1, 2027**: Terminations begin for unpaid dues and fees

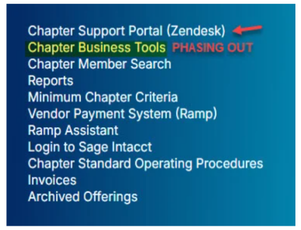
We encourage members to renew early to ensure uninterrupted access to member benefits and to maintain the good standing of their membership and designation(s).

Stay Alert: Protect Yourself from Phishing/Scam Emails

Our staff is quickly informed of phishing attempts in which cybercriminals impersonate the Appraisal Institute and try to steal personal information. These emails may appear convincing but are not from us. Please remain vigilant and follow the guidance below to help protect yourself:

How to Spot a Suspicious Email:

- **Check the sender**: If the email does not come from our official domain (e.g., @appraisalinstitute.org), it is not legitimate.
- **Hover before you click**: If a link doesn't point back to our website (e.g., www.appraisalinstitute.org), do not click on it.



- As resources continue to be migrated over to the Chapter Support Portal, Chapter Business Tools will be gradually phased out.
- Some files and forms may be stored within the AI Chapter EDs SharePoint. If chapter officers need access to a resource that resides in SharePoint, they should work directly with their Executive Director to obtain the information.
- We encourage you to begin using the Chapter Support Portal as your primary destination when searching for chapter resources.

Reminder: Chapter officers, including President, Vice President, Secretary, Treasurer, and Education Chair, and chapter staff have access to the portal.

Chapter Zoom Information
Chapter Executive Directors should be adding their Zoom connection details (e.g., Zoom links) directly to their offerings.
Important: This is only for **Customer Service/internal use** to assist with tickets when students register at the last-minute or lose their email with the link.

To add Zoom connection details:

- Go to **Chapter Portal > Nationally-Developed Chapter Offerings > Edit > Edit Offering**
- At the bottom of the pop-up window, enter information in the "**Zoom Connection Details**" field

For additional assistance utilizing the new Zoom Connection Details feature, please refer to the following SOP.

Publications Announcements

Valuation magazine is all in on showcasing chapter voices!
Help us highlight your community by pitching stories that:

- Cover your chapter's unique or well-received events.
- Describe effective membership growth and support.
- Highlight chapter members who can speak to the benefits of active chapter involvement.
- Profile standout chapter volunteers and their efforts.

As space allows, we are also able to accept full-page ads for major events. Reach out to valuation@appraisalinstitute.org today for more information or to submit!

Welcome New Members

Recognize and congratulate newly Designated members in your chapter! A list of all individuals who were recently designated is available here.

To welcome the new AI professionals who join your chapter last month, login to your Chapter Portal.

1. Select Reports (right-hand side menu bar)
2. AI Chapter Join - Rejoin Report
3. View Report

Reminder:
The join and rejoin report is not related to joining a "chapter" but rather joining the AI in a category for the first time or changing categories.

Please Note: This report will not identify changes related to voluntary category changes or terminations from the Candidate program.

Featured Benefit

VALCRE

Valcre is a valuation software for the commercial real estate industry. It is trusted by more than 250 leading organizations to simplify and streamline their workflow, saving hours a day and accelerating time to revenue. Valcre's web, mobile app, and valuation models provide an end-to-end solution for appraisal workflow, including job and client management, property research, inspections, analysis, and report writing. **AI Members are eligible to receive 25% off the implementation fee and one (1) complimentary Valcre Assist Report!**

Learn More

This is a required notice for Chapter Leaders. It is not a marketing or promotional email. That is why this email does not contain an unsubscribe link and why you are receiving this email even though you may have unsubscribed from other marketing/promotional emails from Appraisal Institute.

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What's New?
Formerly known as the **Operations Manual** and **Chapter Handbook**, the newly enhanced **Chapter Leadership Operations Manual** serves as a centralized resource designed to help chapter leaders successfully navigate their roles and responsibilities. It consolidates key information, tools, deadlines, policies, and best practices into one comprehensive guide.

What's Included?
- Annual calendars, deadlines, and planning resources
- Governance, bylaws, and leadership guidance
- Minimum Chapter Criteria requirements
- Financial stewardship and reporting information
- Chapter resources, tools, and support channels
- Communications, marketing, and advocacy resources
- Operational best practices and FAQs

Key Takeaway
💡 **Think of this as a living document.**
Like many of the resources we've discussed today, the Chapter Leadership Operations Manual will continue to evolve as processes, policies, and chapter needs change.

If you identify information that is outdated, unclear, or missing, please reach out to the Chapter Relations team so we can review and update the resource. Our goal is to ensure chapters always have access to the most current and relevant guidance available.

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Where to Find:
Chapter Support Portal (Zendesk) > Chapter Leadership Resources



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CLP CHAPTER LEADERSHIP PROGRAM

Chapter Innovation Grant

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

Examples of eligible activities include:

- **Membership campaigns**
- **University outreach**
- **Women's Initiative (WIN) programs**
- **Appraiser diversity activities**
- **Trainee placement support activities**
- **Other new programs designed to engage, attract, retain, or develop members and prospective members**

Chapters can submit multiple applications per year, as long as the total does not exceed $1,500.

* The Chapter Innovation Grant is intended to support **new** activities, programs, initiatives, or engagement efforts, not the continuation of existing operations or annually recurring activities. An **event, initiative, or activity that has previously received Innovation Grant funding is not eligible for funding in subsequent years unless a clearly defined and substantially new initiative is being added.**

Application and Guidelines can be found in the Chapter Support Portal (Zendesk):
Chapter Innovation Grant Funding Request - Instructions and Application – Chapter Support Center

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Chapter Innovation Grant Don’ts

Innovation Grant funds may not be used for:

- **Donations**
- **Scholarships**
- **Sponsorships**
- **Requests where funds are redirected to another organization, institution, or individual rather than being used for a chapter-led activity**

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CLP CHAPTER LEADERSHIP PROGRAM

Innovation in Action:
Featured Grant Recipients

- **Women's Initiative (WIN) programs**



Event Overview
- Hosted the Chapter's second annual Women's Networking Luncheon, bringing together **17 women appraisers** across all career stages to foster connections, mentorship, and professional development.
- Featured remarks from three designated members on industry evolution, career pathways, specialization opportunities, leadership, and the value of Appraisal Institute designations.

Attendance
- 17 total attendees:
  - 7 Designated Members, 4 Associate Members, 3 Non-Members, 1 Candidate, 1 Student Affiliate

Key Outcomes
- Successfully connected newer appraisers with experienced professionals, creating opportunities for informal mentorship.
- Facilitated conversations about membership, designation benefits, and career advancement.
- Achieved a significant milestone by connecting a non-member and a student affiliate with a supervisor, helping them begin the path toward becoming trainees.
- Created meaningful engagement through a single-table networking format that encouraged interaction among all attendees.

Next Steps
- Invite attendees to upcoming Chapter and Young Appraiser events.
- Continue fostering mentor relationships and trainee opportunities.
- Incorporate an annual women-focused event into sponsorship offerings to support long-term sustainability and growth.

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CLP CHAPTER LEADERSHIP PROGRAM

Innovation in Action: Featured Grant Recipients

- **Women's Initiative (WIN) programs**

North Star Chapter
Two-day professional development and networking event designed to bring together Appraisal Institute members from across chapters.

The retreat combines **5 hours of continuing education**, property tours, industry insights, and mentorship opportunities in a collaborative resort setting.

Event Highlights
- Educational sessions led by residential and commercial real estate professionals.
- Property and development tours highlighting valuation concepts, highest and best use analysis, and resort-related appraisal methodologies.
- Discussions on market trends, short-term rental impacts, lakefront and resort property valuation, and niche property types.
- Networking and mentorship opportunities designed to strengthen member engagement and professional relationships.

Expected Outcomes
- Engage at least **15 Appraisal Institute members**.
- Deliver **5 continuing education hours**.
- Foster stronger chapter involvement and leadership development.
- Create a scalable model for future WIN Retreats and member-focused educational experiences.
- Gather attendee feedback to shape future programming and educational offerings.

Innovation Grant Impact Grant funding helped enhance the attendee experience by supporting networking activities, including a dinner cruise, and providing branded apparel to encourage engagement and chapter pride.

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CLP CHAPTER LEADERSHIP PROGRAM

Innovation in Action: Featured Grant Recipients

- **Women's Initiative (WIN) programs**

WIN'S BRAINERD LAKES RETREAT

October 09, 2026 - October 11, 2026
6:00 PM - 11:00 AM
Add to Calendar

Madden's On Gull Lake
11266 Pine Beach Peninsula Rd
Brainerd, MN 56401
Directions

Post Share Share



TICKETS

$750.00 Dinner Cruise Sponsor

$500.00 Lunch & Presentation Sponsor

$350.00 Bonfire & Hot Topics Sponsor

$0.00 Retreat Gift Sponsor (in-kind)

REGISTRATION

Members: $200
Non-members: $250

REGISTER NOW

CONTINUING EDUCATION

This seminar is approved for 5 hours of appraisal continuing education by the Minnesota Department of Commerce.

This seminar is approved for 5 hours of real estate continuing education by the Minnesota Department of Commerce.

ABOUT THE RETREAT

Join the North Star Chapter's Women's Initiative Network for a memorable retreat at Madden's on Gull Lake. This event brings together women and men across the profession to build connections, support professional growth, and advance women in appraisal—all while enjoying valuable education and a beautiful Brainerd Lakes setting.



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CLP | CHAPTER LEADERSHIP PROGRAM

Innovation in Action:
Featured Grant Recipients

- **Women's Initiative (WIN) programs**

North Carolina Chapter: 2026 WIN Inaugural Conference

March 12, 2026 | Charlotte, NC

- Hosted a full-day leadership and professional development conference bringing together **50 real estate professionals** from appraisal, brokerage, lending, development, investment, and related fields.
- Featured industry leaders and expert panels focused on **leadership development, cross-disciplinary collaboration, artificial intelligence, community development, and the future of the real estate profession**.
- Strengthened **member engagement, diversity, and networking opportunities** while supporting the advancement of women in real estate.
- Generated strong attendee engagement and interest in future programming, establishing a foundation for continued leadership and educational initiatives.

Outcome: Successfully delivered a high-impact educational program that advanced professional development, fostered industry collaboration, and promoted greater inclusivity within the real estate community.



Secure Your Seat: 2026 WIN Conference!

Thursday, March 12, 2026
Canopy Realtor Association Building | Charlotte, NC

Registration is officially open for NCAI's first-ever WIN Conference — and you won't want to miss this inaugural event.

Join us for a full day of dynamic speakers, meaningful networking, seven (7) hours of CE (pending approval), and forward-thinking conversations designed to elevate professionals across appraisal, brokerage, development, investment, and beyond. From artificial intelligence to community impact, this conference will explore the forces shaping real estate today — and tomorrow.

View the full agenda, session details, and speaker lineup here.

Speaker Spotlight: Afternoon Keynote



Megan Oglesby
Senior Advisor, The Earl & Kathryn Congdon Family Foundation
Principal Investor, Carolina Core FC
Founding Board Member & Investor, WPSL Pro
Advisor, Grant Philanthropic Advisors
Mentor, High Point University Women's Leadership Program

Megan Oglesby will headline our afternoon keynote with an inspiring look at how real estate development can catalyze economic growth, community revitalization, and long-term regional impact.

Drawing from her leadership in the redevelopment of Congdon Yards in High Point, NC, Megan will share how strategic investment and mission-driven development can transform struggling markets into thriving centers of opportunity. She will also discuss how the Congdon Foundation continues to expand its positive influence throughout the Carolina Core region.

Her work sits at the intersection of economic development, philanthropy, and real estate investment — making this session especially relevant for professionals committed to shaping stronger communities.

Meet Our Full Speaker Lineup

What to Expect at the 2026 WIN Conference:

- Morning Keynote with Debbie Gallimore, CCIM, CIPS
- National Perspective from Kelly Davids, President of The Appraisal Foundation
- Real Estate Leadership Roundtable featuring nationally recognized professionals
- AI & Innovation session with Chandra Mast
- Interactive networking and professional development sessions
- Seven (7) hours of CE pending approval
- And more!

Registration

Take advantage of the $130 early rate before March 2. After that date, registration increases by $20—don't miss your chance to save.

Register Now

Questions
If you have any questions about the WIN Conference, please contact the NCAI offices at NorthCarolinaChapter@appraisalinstitute.org.

NC Chapter of the Appraisal Institute
1300 Baxter St., Ste. 360, Charlotte NC, 28204
P 704-719-2644 | F 704-365-3678
www.ncappraisalinstitute.org
NorthCarolinaChapter@appraisalinstitute.org

Appraisal Institute | North Carolina Chapter



Stay Connected

CLP CHAPTER LEADERSHIP PROGRAM

Innovation in Action:
Featured Grant Recipients

North Carolina Chapter: Inaugural WIN Conference



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- **Membership campaigns**
- **Other new programs designed to engage, attract, retain, or develop members and prospective members**

South Florida Chapter Quarterly Coffee Connects: Building Connections Across the Industry
This year, the chapter is launching **Quarterly Coffee Connects**, informal networking gatherings designed to bring together appraisers, real estate professionals, and prospective members in a welcoming setting.

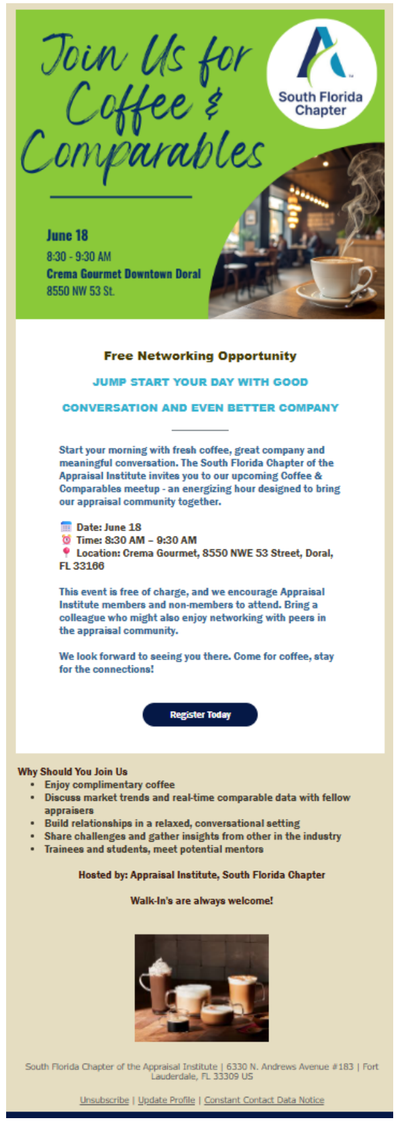
Key Initiatives
- Host quarterly coffee meet-ups at local coffee shops.
- Provide complimentary coffee to encourage participation and engagement.
- Welcome both **members and non-members** of the Appraisal Institute.
- Share information about the benefits of Appraisal Institute membership.
- Foster professional networking, collaboration, and community building.

Expected Impact
- Strengthen relationships within the valuation and real estate community.
- Increase awareness of Appraisal Institute membership opportunities.
- Create an accessible environment for mentorship and professional connections.
- Support member recruitment, retention, and chapter engagement through recurring touchpoints.

Long-Term Vision Establish a sustainable networking program that promotes industry connections, expands chapter visibility, and creates ongoing opportunities for engagement throughout the year.

CLP | CHAPTER LEADERSHIP PROGRAM

Innovation in Action:
Featured Grant Recipients



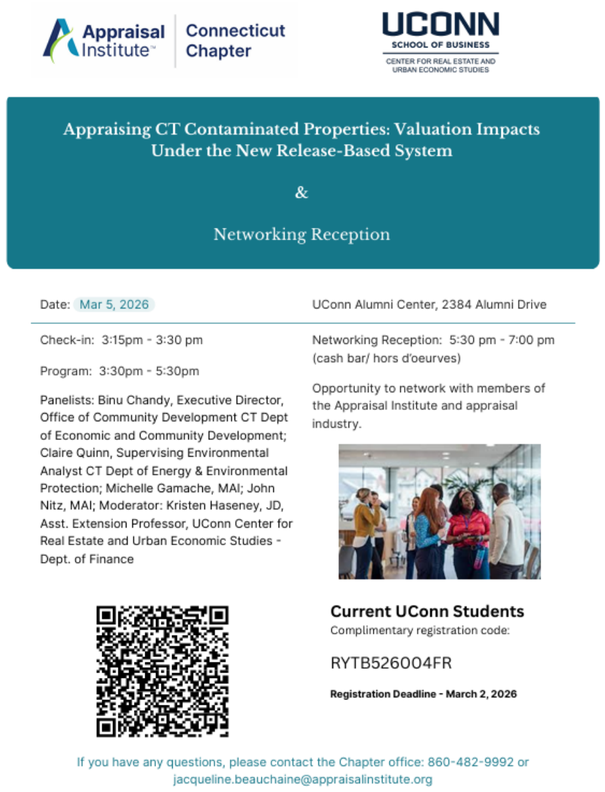


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CLP CHAPTER LEADERSHIP PROGRAM

Innovation in Action: Featured Grant Recipients

- **University outreach**


Appraisal Institute Connecticut Chapter

UCONN SCHOOL OF BUSINESS
CENTER FOR REAL ESTATE AND URBAN ECONOMIC STUDIES

Appraising CT Contaminated Properties: Valuation Impacts Under the New Release-Based System

&

Networking Reception

Date: Mar 5, 2026

UConn Alumni Center, 2384 Alumni Drive

Check-in: 3:15pm - 3:30 pm

Program: 3:30pm - 5:30pm

Panelists: Binu Chandy, Executive Director, Office of Community Development CT Dept of Economic and Community Development; Claire Quinn, Supervising Environmental Analyst CT Dept of Energy & Environmental Protection; Michelle Gamache, MAI; John Nitz, MAI; Moderator: Kristen Haseney, JD, Asst. Extension Professor, UConn Center for Real Estate and Urban Economic Studies - Dept. of Finance

Networking Reception: 5:30 pm - 7:00 pm (cash bar/ hors d'oeurves)

Opportunity to network with members of the Appraisal Institute and appraisal industry.

Current UConn Students

Complimentary registration code:

RYTB526004FR

Registration Deadline - March 2, 2026

If you have any questions, please contact the Chapter office: 860-482-9992 or jacqueline.beauchaine@appraisalinstitute.org

Connecticut Chapter Innovation Grant Success
Event: *Appraising CT Contaminated Properties: Valuation Impacts Under the New Release-Based System*
Date/Location: March 5, 2026 | University of Connecticut, Storrs, CT

Key Highlights

- Hosted a 2-hour CE program featuring state agency leaders, appraisal professionals, and academic experts.
- Partnered with UConn Center for Real Estate to engage future appraisal professionals.
- Reached students through targeted promotion, QR-code registration, and Student Affiliate outreach.
- **23 university students attended**, participated in the educational program, asked questions, and networked with industry professionals.
- Follow-up communications promoted Student Affiliate membership and AIERF scholarship opportunities.
- Successfully increased awareness of the Appraisal Institute and strengthened the chapter's Student Affiliate recruitment pipeline.

Outcome

✅ Enhanced student engagement and exposure to the appraisal profession
✅ Built relationships with future appraisers through education and networking
✅ Expanded visibility of the Appraisal Institute within the academic community

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Innovation in Action:
Featured Grant Recipients

- **University outreach**



Metro New Jersey Chapter Innovation Grant Success
Event: The Real Estate Career Nobody Talks About: Inside the Appraisal Profession
Rutgers University | September 16 & October 9, 2026

Highlights

- Two-part student outreach initiative designed to introduce Real Estate and Finance students to careers in real estate valuation and connect them with practicing appraisers.
- Initial presentation at Rutgers University Business School by Chapter Appraiser Guidance Chairs and a Past Chapter President.
- **19 students and 1 university staff member attended**, with lunch provided to encourage participation and engagement.
- Students received Student Affiliate membership materials and career resources highlighting opportunities within the appraisal profession.
- Program was promoted through the Rutgers Career Center to increase visibility among students.
- Attendees were invited to the chapter's October 9 Fall Lunch Program at no cost, providing additional networking and professional development opportunities.

Outcomes

✅ Successfully engaged 20 university participants during the first event
✅ Increased awareness of appraisal as a career path within the real estate industry
✅ Strengthened relationships with Rutgers University and prospective future members
✅ Created a multi-event pathway for continued student engagement and Student Affiliate recruitment
✅ Final expenses to be reported following completion of the October 9 chapter event, which represents a significant portion of the program investment.

CLP CHAPTER LEADERSHIP PROGRAM

Innovation in Action:
Featured Grant Recipients

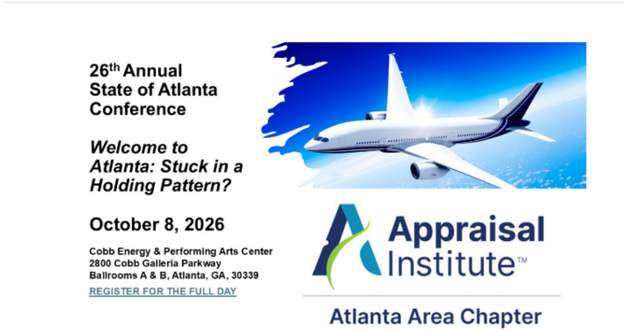
Trainee placement support activities

Complimentary attendance
To help cultivate the next generation of real estate professionals, chapter reached out to our contacts at colleges and universities across Georgia and the metro Atlanta area to invite students and faculty to attend at no cost.

State of Atlanta Speakers & Panel 2026_Video V2 - Google Vids

Last year, outreach focused on universities and student affiliates. This year, expanding that effort to also reach:

- **Members of the public who contact chapter about entering the profession**
- **PAREA participants**
- **ADI scholars**



In addition, chapter surveyed members to gauge their interest in serving as supervisors for trainees. Those who have signed up are listed on NEW Chapter website:

https://www.appraisalinstitute.org/chapters/atlanta/chapter-leadership

Designated Members Willing to take on Trainees:

Matthew V. Albigese, MAI - Commercial
David C. Ball, MAI - Commercial
Kenneth H. Cantrell, MAI - Commercial
Grant Griffin, MAI - Commercial
Scott E Hirons, SRA - Commercial
Peter A. Lamas, MAI - Commercial
David Scott Murphy, SRA, AI-RRS - Commercial & Residential
Jeffrey T. O'Dell, MAI - Commercial
Robert L. Ryan, MAI - Commercial
Andrew D. Sheppard, MAI, AI-GRS - Commercial
Clifford M. Ward, MAI - Commercial

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Chapter Appraiser Guidance Committee

The Chapter Appraiser Guidance Committee serves as your chapter's membership-focused committee, helping strengthen member engagement, recruitment, retention, and overall chapter connections.

Per Reg 8.

Part B: Required Chapter Committees

Section 1. Chapter Appraiser Guidance Committee

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

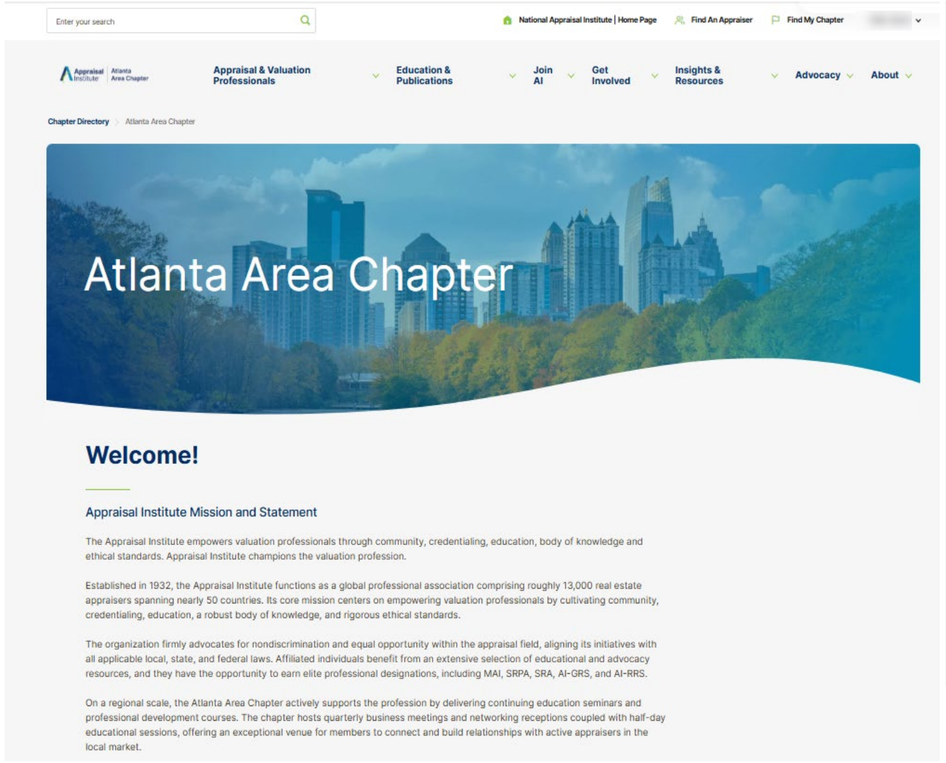
b) arrange special programs and events in areas such as university relations, community outreach, professional development, Candidate guidance; and

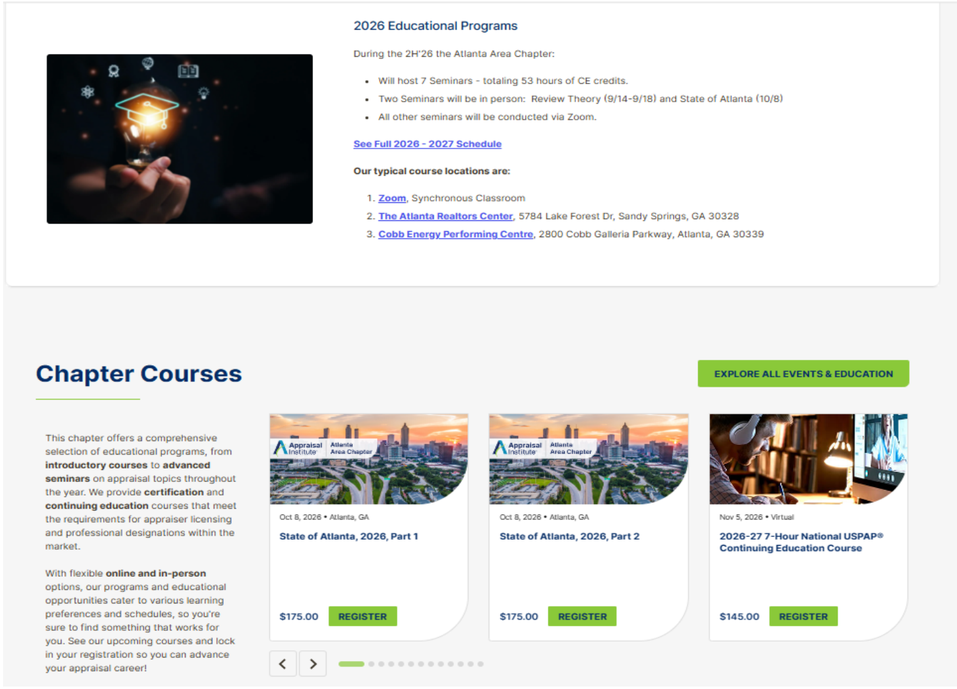
c) perform such other duties as may be assigned by the national Board of Directors and the Chapter.

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Chapter Websites

- Nationally hosted chapter websites are available to all chapters
  - 33 chapters have migrated over, 3 more in progress





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Chapter Websites



Uniform Standards of Professional Appraisal Practice (USPAP)

November 5, 2026 - Virtual

This required 7-hour continuing education course, copyrighted by The Appraisal Foundation, focuses on USPAP requirements for ethical behavior and competent performance by appraisers.

Register Now



GIS Mapping & Data Analysis for Appraisers

November 18, 2026

Participants will learn GIS terminology, methods for cleaning and enhancing data, creating custom GIS files and layer overlays, geospatial analysis, and practical mapping applications for appraisal reporting.

Register Now



State of Atlanta Conference

Oct 8, 2026 | Feature

Join industry leaders and peers for a full day of engaging presentations and discussions featuring the latest insights on residential and commercial markets, economic conditions, and other topics to be announced. Connect with colleagues over breakfast, educational sessions, lunch, and an evening reception at our 26th Annual Conference.

More Information

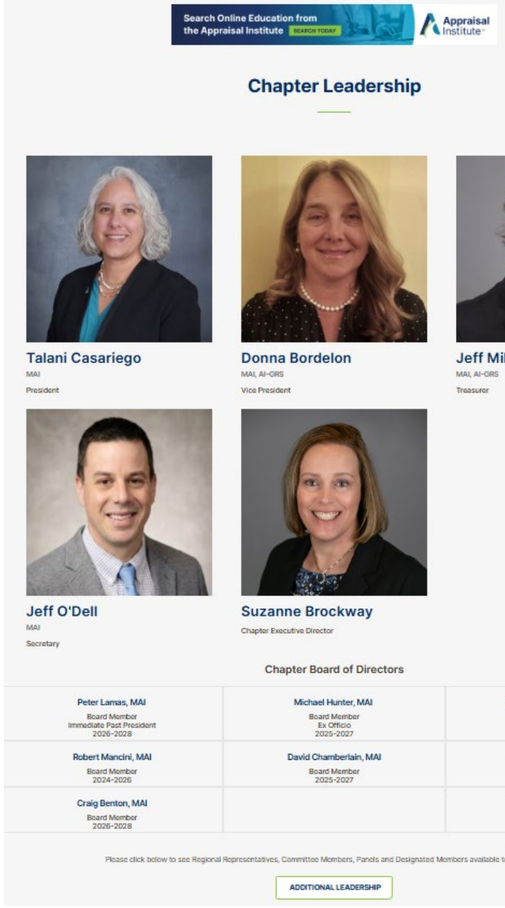


Membership Resources

The Appraisal Institute membership provides valuation professionals with a wide range of benefits designed to support career growth, professional excellence, and industry leadership. Members gain access to exclusive educational resources, discounted training, professional development opportunities, and a nationwide network of appraisal experts.

Additional benefits include valuable technology discounts, professional tools such as report templates and ethics resources, specialized insurance programs, and enhanced visibility through the public "Find an Appraiser" directory.

Learn More





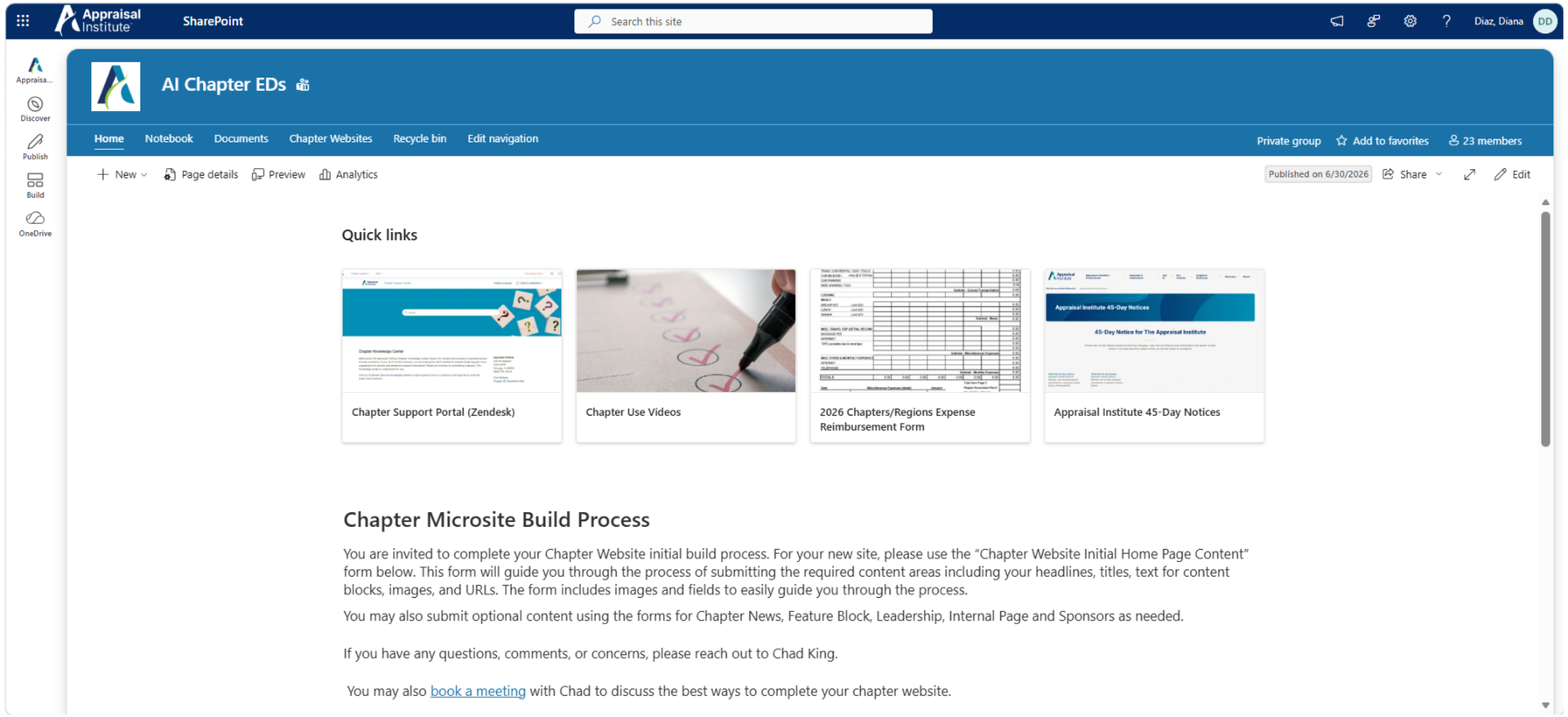
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Additional Resources

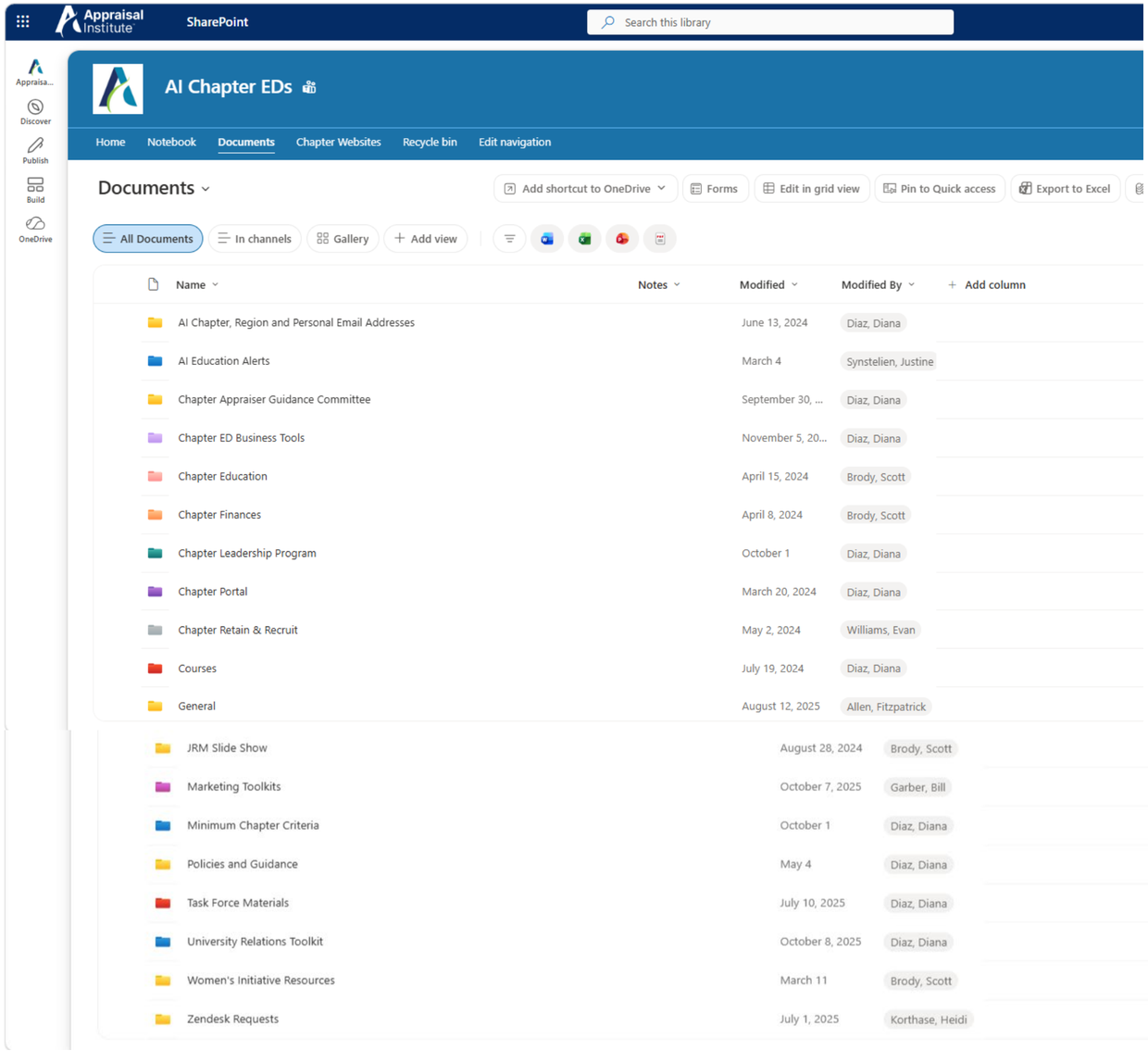
- AI Chapter email accounts for chapter operations
- AI Chapter EDs SharePoint
- Chapter Policy & Procedures Manual template

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AI Chapter EDs SharePoint



AI Chapter EDs SharePoint



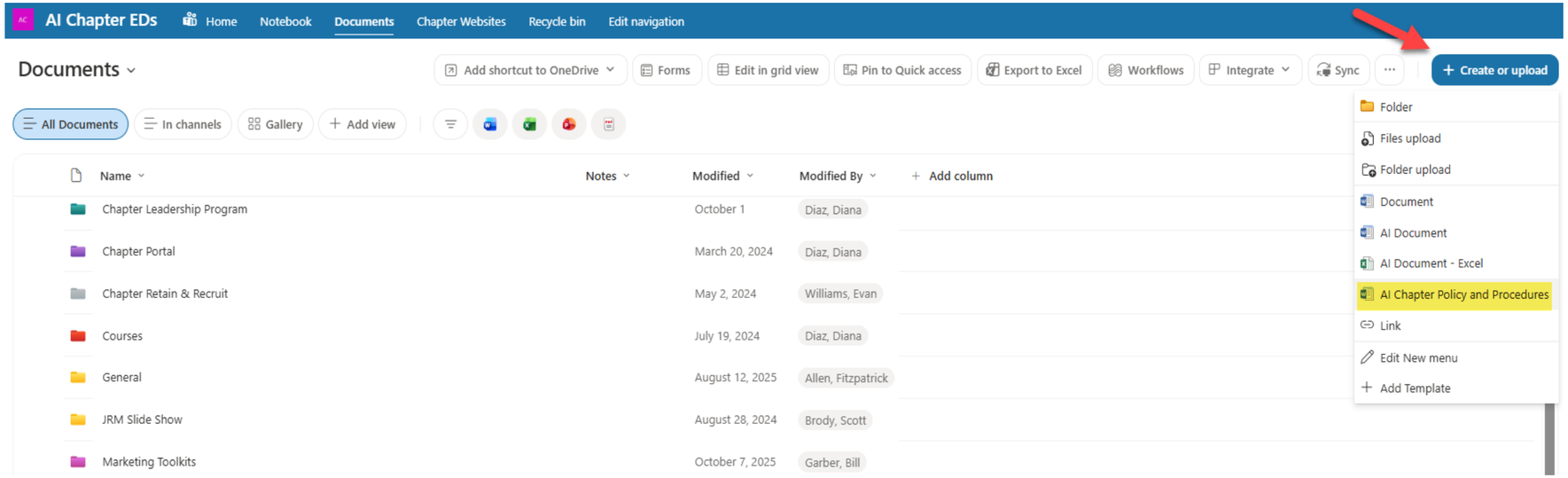
Chapter Policy & Procedures Manual template

The Chapter Policy & Procedures Manual Template is intended to serve as a framework for chapters to complete with their own chapter-specific information, policies, and procedures.

It is **not** a finalized manual, nor is it intended to function as a single standardized operating manual for all chapters.

It should be regularly reviewed, updated, and maintained by the Executive Director and/or chapter leadership team.

This has been added to the AI Chapter EDs SharePoint > Documents > + Create or upload:



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Marketing

Rachel Morrison
Director of Marketing

Appraisal Institute®

CLP CHAPTER LEADERSHIP PROGRAM

How Marketing Supports Your Chapter

We help your chapter get seen

- Sharing your education and events on LinkedIn
- Featuring chapter news in Appraisal Now
- Creating ready-to-post social content through Vista Social
- Giving your ED a full marketing toolkit

Why it matters

- Members see the value of their chapter
- Prospects find you and want to get involved
- Chapter and national show up as one team





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Start With a Strategy

Marketing starts with a plan

- Set two or three priorities for the year
- Pick your biggest events and plan backward from them
- Choose the channels for each one
- Agree on who does what across your chapter

Why it matters

- Every message has a purpose
- Your ED knows what to focus on
- Promotion starts early, not the week before

FOUR QUESTIONS FOR YOU AND YOUR ED

01 Who are we trying to reach?

02 What do we want them to do?

03 Where do they spend their time?

04 How will we know it worked?

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Meet people where they are

Each audience needs something different from your chapter

STEP 1

Get on their radar

Students and new appraisers

Show up at colleges and career events. Invite them to one meeting.

STEP 2

Give them a reason to come

Nonmember appraisers

Lead with the CE they need. A great event is often the first step to joining.

STEP 3

Help them finish

Candidates and Associates

Pair them with a mentor. Celebrate every milestone out loud.

STEP 4

Make them feel valued

Members

Ask them to speak, host or volunteer. Thank them often.

At every step **Local partners and sponsors.** Show them the turnout. Send attendance and photos after every event.

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A Multi-Channel Approach

Every channel has a job

Email
Your strongest channel for registrations. Reaches members and past attendees.

LinkedIn
Where appraisers see what is happening. Use the chapter page and your own profile.

Vista Social
Ready-made posts your ED shares to chapter pages in a few clicks.

Appraisal Now
Our national newsletter. We feature chapter news when space allows.

Webinars
Reach members across your region without the travel.

LinkedIn ads
Paid reach for nonmember appraisers in your area. Small budgets work.

Chapter website
The home for event details and registration. Every post links back here.

Word of mouth
A personal invite from you or your board. Still the strongest pull.

Rule of thumb **Use at least three channels for every major event.**

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One event, every channel

A sample plan for your biggest event of the year

8 weeks out

- Save the date email
- Event page live
- Request in the portal

6 weeks out

- Registration opens
- LinkedIn post
- Vista Social post

4 weeks out

- Speaker or topic spotlight
- Optional LinkedIn ad

2 weeks out

- Reminder email
- Board shares personally

Event week

- Last call email
- Take photos

After

- Recap post with photos
- Thank-you email
- Share your win

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Plan a Content Calendar

Don’t wear people out

- Members hear from national too
- See every send in one place
- Space out emails so members don’t tune out

Set one up

- Plan ahead of time
- Check national sends first
- About one chapter email a week
- Give every item an owner

Tools Excel or Google Sheets works fine. Asana is a low-cost option with reminders and owners.

SAMPLE MONTH

	Week 1	Week 2	Week 3	Week 4
National	Appraisal Now	Renewal reminder		Course promo
Email	Chapter newsletter	Skip this week National is sending	Seminar reminder	
LinkedIn	Seminar save the date	Member spotlight	Speaker spotlight	Recap with photos
Vista Social	National news	Education promo	National news	Seminar last call
Events		Board meeting		Spring seminar

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Marketing Best Practices

What strong chapters do

- Promote each event at least six weeks out
- Give every message one clear ask
- Use official AI brand graphics and templates
- Post on a steady rhythm, not in bursts
- Take photos at every event
- Share national news alongside chapter news

Where to start

- Sit down with your ED and their Email Marketing Calendar
- Pick your three biggest events and plan around them

WHAT TO AVOID

- Promoting only the week before
- One email and done
- Posts with too much text
- Homemade logos and off-brand colors

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Measure What Works

What to track

- Registrations and where they came from
- Email opens and clicks
- LinkedIn followers and engagement
- Attendance and new faces
- New members and renewals

How to use it

- Review each big event with your ED
- Do more of what worked, drop what didn’t

ONE SIMPLE HABIT

Add “How did you hear about us?” to every registration form.

It tells you which channels actually fill your room.

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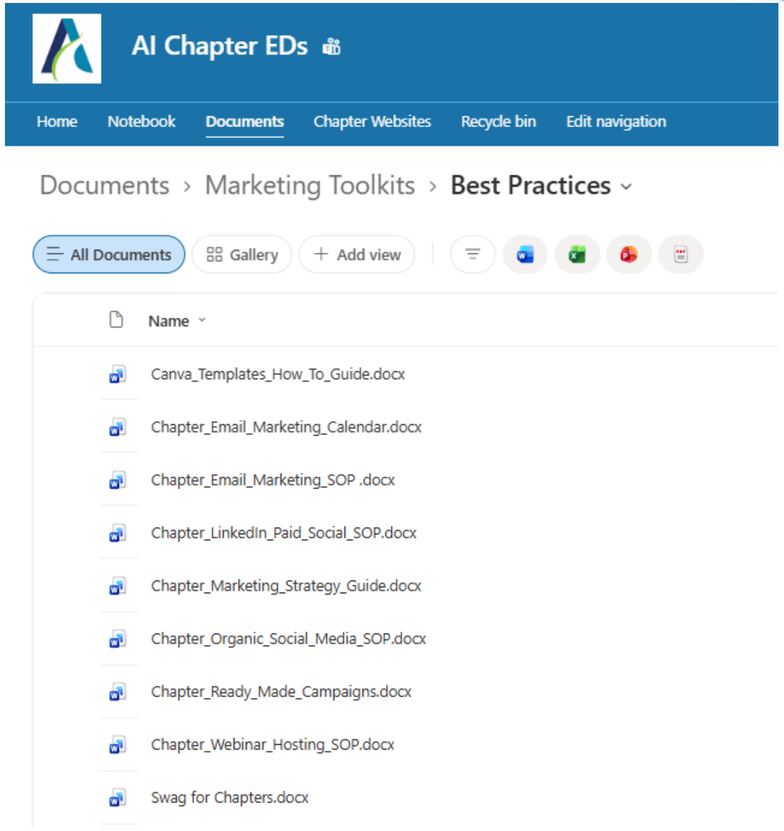
Chapter Marketing Toolkit

Everything your ED needs, in one place

- Chapter Marketing Strategy Guide
- Email Marketing guide
- Organic Social guide
- Webinar Hosting guide
- LinkedIn Paid Social guide
- Email Marketing Calendar

Plus ready-to-use assets

- Brand graphics, templates and Teams backgrounds
- Ready-made campaigns for recurring moments



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Where to Find Resources

National news to reshare
AI LinkedIn and Appraisal Now
Shows members the full value of their membership

Brand graphics and logos
SharePoint > Marketing Toolkits > AI Brand Graphics
Official logos, colors and approved graphics

Templates and campaigns
SharePoint > Marketing Toolkits > Campaigns
Email and social templates, images, and resources focused on top-priority national campaigns

Best practices
SharePoint > Best Practices
Email, social, webinars and ordering swag

Ready-to-post content
Vista Social login
Posts we load for your ED to share

Requests and wins
chaptersupport.appraisalinstitute.org
- Select Chapter Support > Chapter Services > Marketing-Related inquiry

Good to know **Your ED has SharePoint access. Ask for a walkthrough.**

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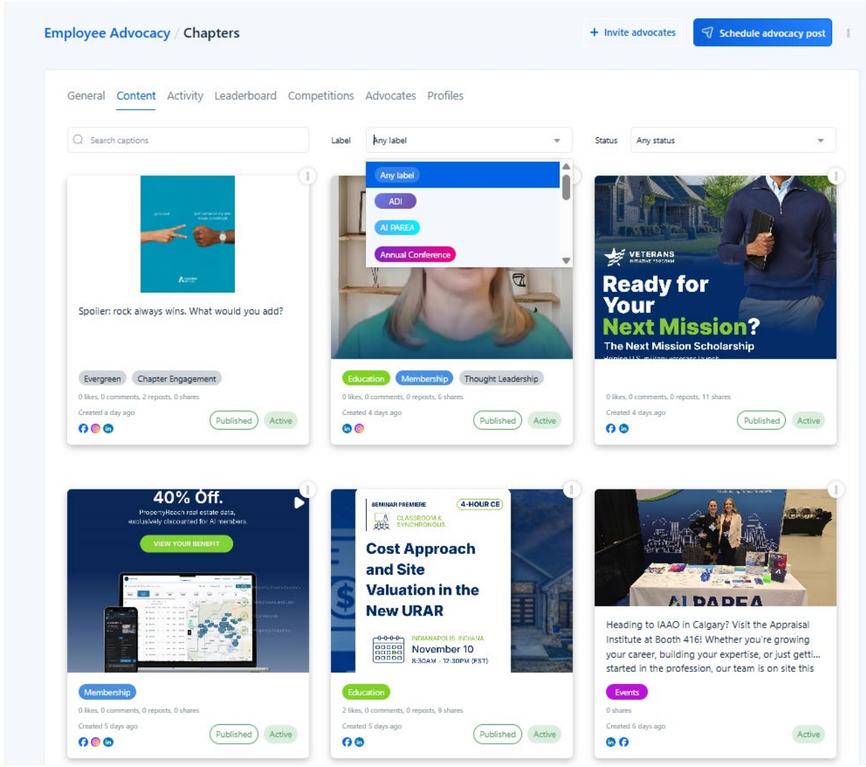
Vista Social

What it is

- Our social media advocacy platform
- We create the posts and load them to your dashboard
- Your ED shares them in a few clicks

Why it matters

- Your chapter shows up more often
- Every post looks polished and on brand
- Members see chapter and national as one team



HOW YOU CAN HELP

- Ask your ED what's been shared this month
- Follow your chapter's pages and engage with posts
- Reshare chapter posts from your own LinkedIn

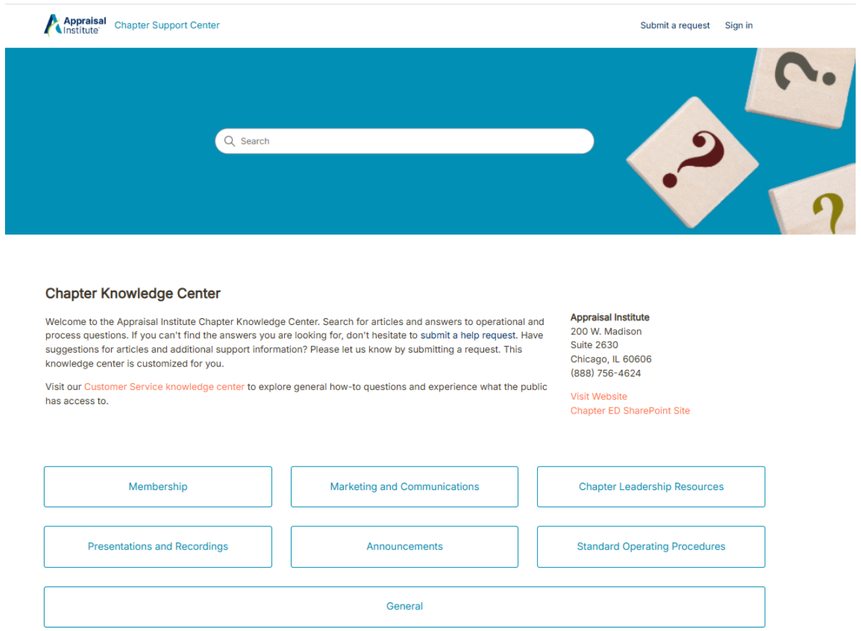
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How to Request Marketing Support

Start at the Chapter Support Portal (Zendesk)

- Go to chaptersupport.appraisalinstitute.org
- Select Chapter Support > Chapter Services > Marketing-Related inquiry
- Tell us what you need and when



Tips for a great request

- Give us as much lead time as you can
- Tell us your goal and who you want to reach
- Include dates, links and key details
- Attach photos or graphics you want used

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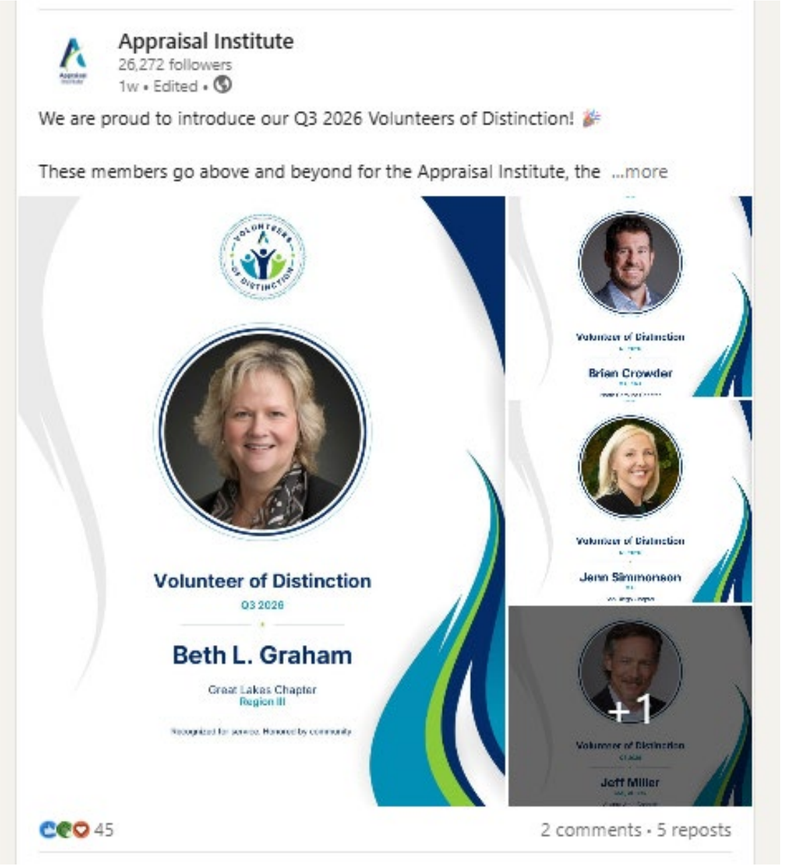
Share Your Wins

What counts as a win

- New designations and member milestones
- Great events and strong turnout
- Awards, partnerships and community work

How to share it

- Submit it in the Chapter Support Portal under Marketing
- Add a photo and a few lines about what happened
- We'll look for the best place to feature it



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Your Role as President

Lead the strategy

- Set your marketing priorities with your ED
- Plan your biggest events across every channel
- Be visible. Post and reshare from your own LinkedIn
- Bring every request to the Chapter Support Portal
- Share your wins so we can celebrate them

We're here to help

- Chapter Support Portal, under Marketing
- chaptersupport.appraisalinstitute.org

YOUR NEXT STEP

Book a planning session with your ED before the year starts.

Bring the Email Marketing Calendar and your three biggest events.

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Finance

Elizabeth Kramer
Controller

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President's Responsibilities – Finance

- Support the Chapter Board's fiduciary responsibility in fulfilling the Chapter's mission and annual goals in a fiscally responsible manner.

- Monitor the Chapter's financial performance including:
  - Management of expenses
  - Projecting cash flow and financial results
  - Leading the annual budget process – Incoming presidents should be involved in the budgeting process with the Finance Committee and Executive Director.

Resources

- Finance Committee, Treasurer, and Executive Director

- Financial Reports – the best way to measure the financial health of the chapter
  - Review Balance Sheet and Income Statement regularly
  - Reports available on netForum Chapter Portal for dues and education revenue
  - Ask questions if the results are not as expected.
  - Unexpected variances should be identified, explained and possible adjustments should be discussed.

- Other Chapters

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Chapter Invoice Approvals – Finance

Chapter Executive Director, Treasurer and President are all involved in the invoice approval process, including:

- Submission of invoices to the Ramp system for payment.
- Presidents are 2nd approvers; two approvals needed for invoices and credit card transactions >$3,500
- When approving, you are confirming National has the authorization to pay the vendor and the amount to be paid is correct.
- Payment is made within 10 business days of the approval in RAMP.
- Incoming leadership (2027 Presidents and Treasurers) receive communication for Ramp approver credentials in mid- December.
- Ramp mobile app available.
- Approval responsibilities effective 1/1/2027

October - Now

Chapters will be notified of the 2027 dues fee structure including Candidate & Affiliate Funding and changes in other fees. Incoming chapter presidents should be involved in the budgeting process with their Finance Committee and Executive Director.

Considerations for 2027 and Best Practices:

- Always ask if the typical budgeting/planning process will work again for next year.
- Are revenues sufficient to cover necessary operating expenses?
- Cyclical nature of revenues/expenses
- Plans should continue to be flexible and include contingencies.
- Be realistic, make the most accurate projections based on what is known.
- Use historical data as a baseline and make appropriate changes

Considerations for 2027 and Best Practices cont.:

- Every Chapter's situation is different and there is no one-size-fits all solution
- Strategic use of Reserves

Budgets should guide financial activity but remain adaptable to changes in operational needs. Budgets require regular monitoring. Compare actual performance against the budget periodically and adjust as needed

Budgets are due to the National Finance department by **January 31, 2027**. Late submissions will result in payments not being issued on behalf of chapter.

Chapter Investment Funds – Finance

- Two investment funds options:
  - JPMorgan Chase Prime Money Market (Pooled)
  - Schwab Reserve Portfolio (Pooled)
  - $10,000 minimum for each fund

- Deposits or withdrawals quarterly at the beginning of the quarter.

- Returns recorded monthly to the chapter's financials.
  - Schwab Portfolio net investment returns are reinvested into the funds.
  - JP Morgan Money Market interest is paid out monthly to the chapter.

- Information on current and historical investment returns is available from the Finance department

- Chapter /Region Leadership Training:
  - January/February 2027
  - Financial reports
  - Accounting for deferred dues and education
  - Intercompany accounts and transfers

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Government Relations

Brian A Rodgers
Senior Manager of Federal

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- **Ways Chapters Can Help GR Efforts:**
  - **Grassroots Advocacy**
  - **AI PAC**
- **Advocacy Contact**

Who will serve as your Chapter's Advocacy Contact?

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Government Relations

Grassroots Advocacy

- Action Alerts
- Host a Member of Congress

Who will serve as your Chapter's Advocacy Contact?

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AI PAC

- AI PAC helps develop strong congressional advocates for appraisers
- Support federal Members of Congress who back our positions on appraisal issues.
- Ensures that the Appraisal Institute has a "seat at the table“
- AI PAC “Wins”?



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AI PAC How are contributions made?

- Box check on membership renewal form
- Online on AI's website
- AI Events/Meetings
- QR Code
- Chapter Challenge

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Takeaways:

- Name a Chapter Advocacy Contact
- Include AI PAC References at Events
- Share/Encourage Action on Alerts
- AI DC will support you!

Who will serve as your Chapter's Advocacy Contact?

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VALCRE

Foundation for Growth

Trends in the Profession and Preparing for the Future

Mark Vella | Director of Valuation, Valcre

Appraisal Institute Chapter Leadership · Chicago · October 22, 2026

1,000+ designated members who earned their designation 40+ years ago

>

~650 candidates working toward designation today

Not a membership problem. A succession problem.

Source: Appraisal Institute 2025 Membership Fact Sheet

Three things in 45 minutes

01



The numbers

Where the profession honestly stands, and why

02



What AI and Software actually changes

The work, not the hype. And what it doesn't touch

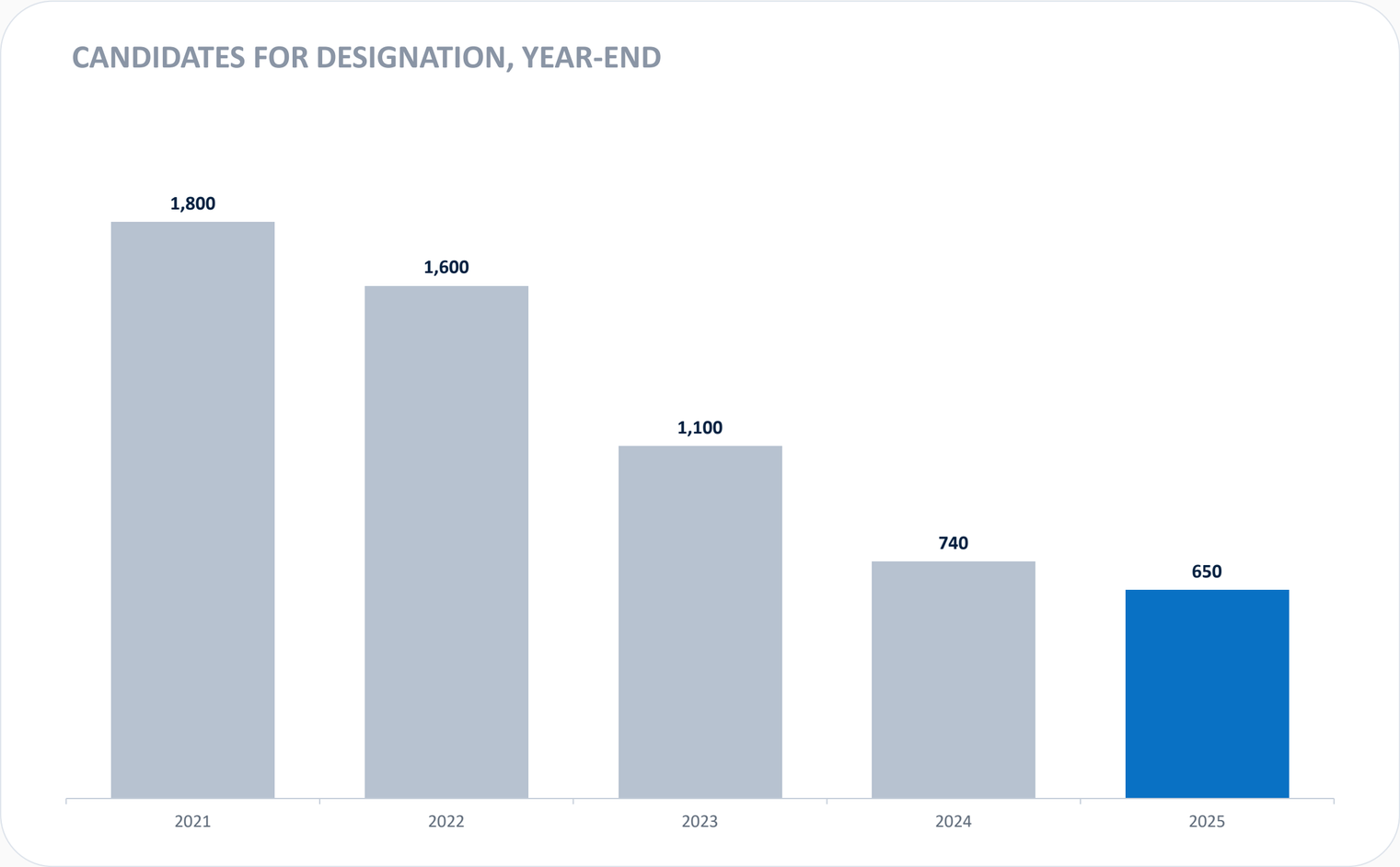
03



AI as our recruiting story

Why better software and AI is our best pitch to the next generation, and your 2027 plan

Candidates for designation: down 64%



–64%

in four years. Not residential, not commercial: the whole pipeline.

Our entire national pipeline would fit in one hotel ballroom.

Source: Appraisal Institute Affiliation/Membership Fact Sheets, 2021–2025 (figures are rounded: “more than,” “approximately”).

More leaving than arriving

16,000+ → ~13,000

AI members, 2021 to 2025. About 2,000 retired members left in a 2025 roster cleanup.

2,700+

designated members already in retired status (2024)

~4,800 fewer

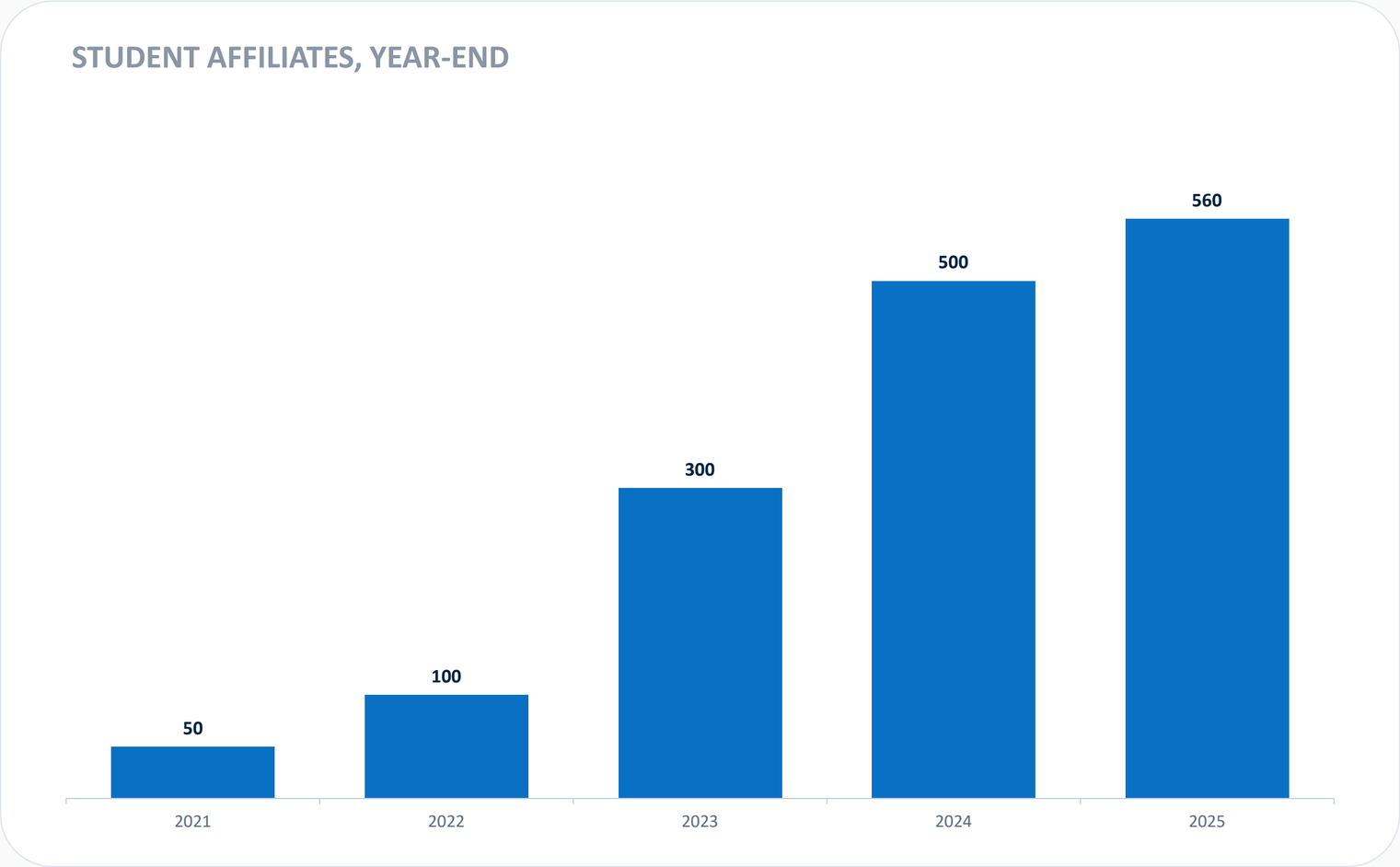
credentialed appraisers nationwide in three years: ~70,700 to ~65,900

70%+

of appraisers were over 50 (2022)

Sources: AI fact sheets 2021–2025; ASC 2025 Annual Report (distinct appraisers, ±5%); HousingWire (2022).

The real bright spot: students are coming



11×

student affiliates in four years: about 50 to 560

+15%

associate members, about 2,600 to about 3,000

Source: Appraisal Institute fact sheets, 2021–2025. 2022–2024 student counts are “more than” figures. Associate members were Practicing Affiliates before 2024.

Every credential runs through a supervisor



Every hour runs through a senior appraiser with time to train. Those are the busiest people in the profession, and the closest to retirement. That's the real bottleneck.

Source: AQB Real Property Appraiser Qualification Criteria, as published by state boards (e.g., Texas TALCB).

Why aren't they coming?



We're not telling our story where they're listening

They're on LinkedIn, YouTube, TikTok and campus. We're in a ballroom.

Fix: us



From the outside, the job looks like data entry

Hunting comps, retyping leases, pasting boilerplate.

Fix: Software | AI



The path runs through a supervisor

Up to 3,000 hours, and finding a supervisor with time to train you is luck.

Fix: AI frees supervisors

Our clients went all-in on AI in 2 years

<5%

of CRE companies had started an AI pilot, July 2023

→

~90%

are piloting AI in 2025: our clients already work this way

5%

have hit all their AI goals. It's early and messy, and that's exactly why the people who learn it now get the advantage.

Source: JLL 2025 Global Real Estate Technology Survey (1,500+ CRE investors and occupiers). Investors 88%, occupiers 92%.

Where the hours go

GATHER & ASSEMBLE

- Pulling and verifying comps
- Re-keying rent rolls from PDFs
- Abstracting leases
- Building the market section
- Formatting tables and boilerplate

Software with AI can handle

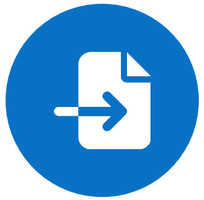
JUDGE & EXPLAIN

- Choosing comps, and defending why
- Testing rents, sale prices and cap rates against this asset
- Reconciling three approaches into one number
- Explaining it to a client, or on the stand

This is the job

The biggest chunk of the appraisal, at maybe 80%, is gathering and assembling.

What software with AI already does in an appraisal shop



Extracts

Rent rolls, T-12s and leases from PDF into the model in minutes



Drafts

Site and improvement descriptions from your notes and photos



Researches

Market reports and news into a sourced first draft



Checks

Areas that don't tie, math errors, missing USPAP elements



Integrates

Built into the software you already use

Every one of those is assembly. **None of them is judgment.**

Embrace AI, on a platform with guardrails

The profession needs AI, inside a platform that stands up to regulatory requirements



Guardrails

Controls that keep AI output inside professional boundaries



Regulatory-ready

Built to stand up to USPAP, the new guidance on AI, and client or regulator review



Judgment stays yours

AI assembles. The appraiser reviews, edits and signs.

Whatever platform your firm chooses, hold it to our standards.

What AI doesn't do



Walk the property



Notice the owner's occupancy story doesn't add up



Testify



Carry the designation, the reputation and the E&O

Clients don't pay us for data. **They pay for judgment they can rely on.**

A Tuesday in 2030

8:00

180-unit multifamily assignment lands

8:30

Rent roll, T-12 and comps in the model, checked and flagged

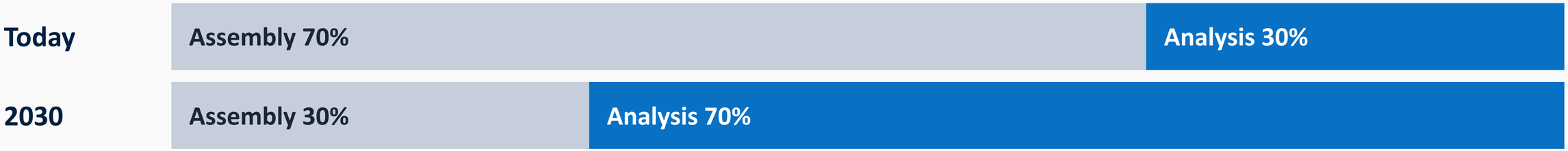
Morning

Broker calls, site walk, rent, price and cap rate conclusions she can defend

Afternoon

Edits the AI draft into her voice, runs QC, owns the reconciliation

SHARE OF THE DAY, STARTING IN YEAR ONE (ILLUSTRATIVE)



Same standards. Same responsibility. Same signature. The job goes from 70% assembly to 70% analysis. As long as the tools you choose have guardrails and structure.

Technology the next generation will rely on

As a younger generation joins the profession, they will rely on technology that streamlines their work, so they can focus on valuation analysis instead of the busywork of gathering and keying in data.

HANDLED BY TECHNOLOGY

- Gathering data
- Keying in rent rolls and leases
- Formatting tables and boilerplate

FOCUS OF THE APPRAISER

- **Choosing and defending comps**
- **Testing rents, sale prices and cap rates**
- **Reconciling to a number they sign**

Their first year looks like analysis, not data entry.

Three shifts for the profession

From producer to advisor

More of the engagement goes to risk, the “what if,” and the second opinion.

More of the work that pays

Litigation, eminent domain, special-purpose assets, review work: where an MAI's judgment earns its fee.

Capacity without burnout

Handle the volume after retirements, without trading away quality.

The firms that figure this out first will be the ones young appraisers choose.

What they hear vs. what they want

WHAT THEY HEAR WHEN WE SAY “APPRAISER”

- Clipboard and measuring wheel
- Filling out forms
- Data entry

A picture 30 years out of date.

WHAT GEN Z GRADUATES SAY THEY WANT

52% say AI training is a key factor in choosing an employer

1 in 3 wouldn't take a job at a company that bans AI tools

52% **would accept less pay for training in cutting-edge tech**

Source: A.Team, “Generation GPT” survey of 332 U.S. Gen Z students and recent graduates, May 2024.

1995 called. It wants its job posting back.

THE POSTING TODAY

1995

Appraiser Trainee

- Commission split
- Gather comparable sales data
- Proficient in Excel and Word
- Sign your first report in a few years

THE POSTING WE COULD WRITE

Real Estate Valuation Analyst

- ✓ **Salary plus bonus**
- ✓ **AI-assisted analysis from day one**
- ✓ **Decisions worth tens of millions**
- ✓ **A clear path to the MAI**

WHAT APPRAISERS EARN (BLS, MAY 2025)



<$40,030

Bottom 10%: where the first years sit

$67,960

Median

>$122,660

Top 10%: where the career goes

Source: BLS Occupational Outlook, appraisers and assessors of real estate (includes assessors), May 2025. Postings are illustrative composites.

We've seen this before: accounting

	ACCOUNTING	APPRAISAL
Shrinking pipeline	Fewer accounting graduates every year	**~4,800 fewer appraisers in three years**
Long credential path	150 credit hours for the CPA	**1,500 to 3,000 supervised hours**
Fix the path	Push for alternatives to the 150-hour rule	**Free supervisors to train, with AI**
Change the story	Typical audit uses 4× the advanced tech of three years earlier (KPMG)	**AI, data and analytics, if we tell it**

Same problem. Same playbook: fix the path and change the story.

Two ways Technology recruits

By message

Change the story we tell

Stop selling “appraiser.” Sell “the analyst whose number moves a $40 million deal.”

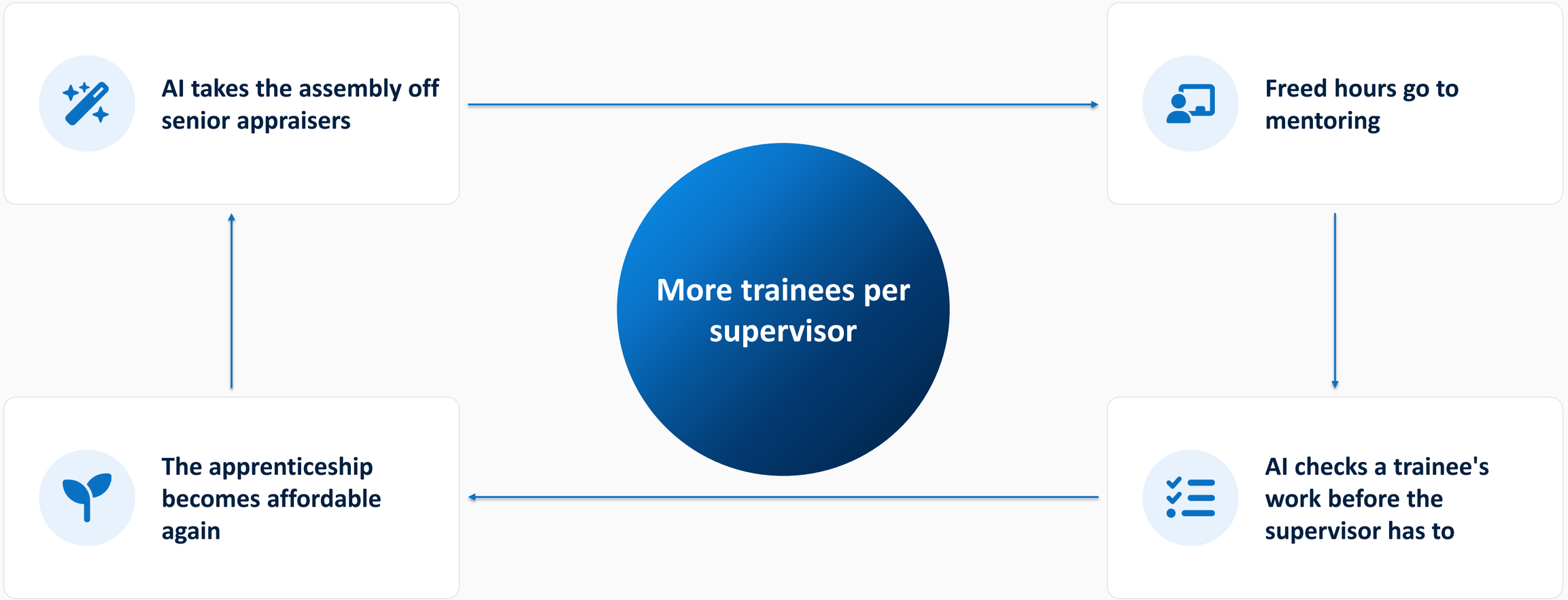
By example

Change the experience they have

Watching someone retype a rent roll confirms the stereotype. Watching AI build the model in 20 minutes, then a real argument about rents, comps and the cap rate, recruits them.

Already happening: University of Miami student panel with six appraisers · North & Central Texas, Nov 13: “Man vs. Machine” + “The Next Generation of Appraisers”

The trainee bottleneck is where AI helps most



Our members are the ad

MAI

A 35-year-old MAI

Appraiser · posted this week

Used trusted software with AI on a complex assignment, and applied the time savings on the analysis that won the client.

Like Comment Share

Illustrative

An ad we don't have to pay for.

The most credible recruiting message isn't a brochure. It's a peer showing the modern job.

1 → hundreds

Every chapter in this room has members who could post one next month.

Five trends to plan around in 2027

1	**The pipeline is shrinking**	Candidates for designation down about 64% since 2021
2	**Supervisor time is the bottleneck**	Every credential runs through a senior appraiser's time
3	**AI went from pilot to standard**	About 90% of CRE companies are piloting AI. Our clients are already there
4	**The rules and the data are going structured**	New USPAP guidance on AI, structured data, and whatever comes next
5	**The next generation picks employers by their tools**	And they're watching how we work

Your chapter's three roles

National sets policy. **The Institute's future is decided locally.**



The front door

Where a student or trainee first meets this profession



The classroom

Where members learn the tools that keep them relevant



The megaphone

Where our story gets told, by members, to the next generation

ACTION

1

Run one hands-on AI program

Not a lecture. A working session where members use AI tools on a real, anonymized assignment.

OPEN IT TO PEOPLE WHO AREN'T MEMBERS YET

- **Trainees**
- **Early-career analysts**
- **RE & finance students**

ALREADY ON CHAPTER CALENDARS

- Seattle
- Atlanta
- New Jersey
- Maryland
- Northern California

ACTION

2

Open the shop doors

Five member firms that use modern tools. One “day in the life” each, for a student or trainee.



5 firms × 1 shadow day

CONNECT THROUGH

University RE & finance programs

Chapter membership dashboard

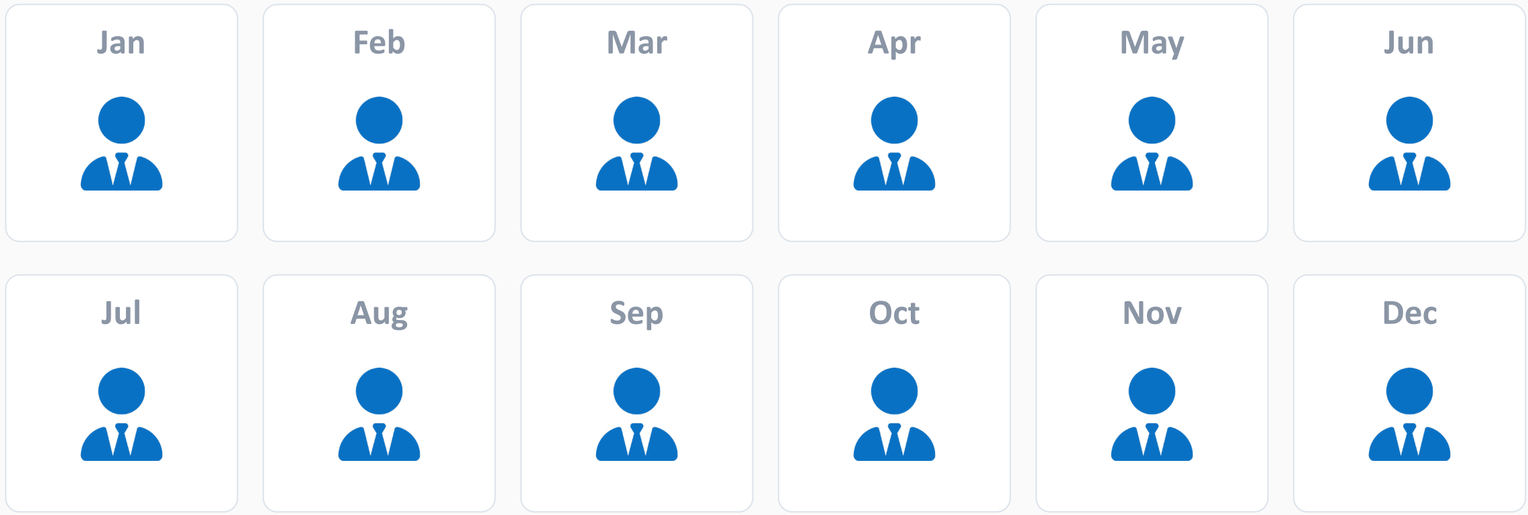
Model: the University of Miami student panel: six appraisers, one evening, an honest look at the modern job.

ACTION

3

Make your members the ad

12 members · 12 months · 12 stories



One LinkedIn post each on how AI changed their work. Ideally some under 40. The chapter shares every one.

Retain: give every member a reason to stay



Be the place members learn technology tools

Continuing education people actually want is the best retention tool you have.



Give senior members a new role

Your most experienced designated members become the mentors who train the next generation.



Build an early-career cohort

Candidates and associate members under 40 get a peer group. People stay where their peers are.

Recruiting is half the job. Keeping the members we have is the other half.

Your 2027 chapter calendar

Q1

AI workshop

Hands-on, and open to trainees and students

Q2

Shadow days

Five member firms, one “day in the life” each

Q3

Campus panel

The University of Miami model

Q4

Take stock

Twelve member stories posted; your one number, measured

Four quarters, four moves. No new budget line.

Measure one number

NOT THIS

~~Total membership~~

It moves too slowly to tell you what's working.

TRACK THE PEOPLE YOU PUT IN FRONT OF THE PROFESSION



Students at your programs



Trainees matched with a mentor



Shadow days hosted

If that number goes up, membership follows.

Before you leave Chicago

Pick one of the three actions. Name the person who owns it.

Action _____

Owner _____

First step by _____

One action.
One owner.

1,000+ designated members who earned their designation 40+ years ago

>

~650 candidates working toward designation today

Build it again, with the tools of our day.

Source: Appraisal Institute 2025 Membership Fact Sheet

“

The profession isn't shrinking because the work is disappearing.

It's shrinking because the job we advertise hasn't changed since 1995.

1995 called. It wants its job posting back.

Thank you

Questions?

Mark Vella | Director of Valuation, Valcre

mark@valcre.com

Engaging Your Members and Appraisal Community Community

PANELISTS

Vanessa Hall, MAI, AI-GRS

Chair, Women's Initiative Committee

Sharon L. Malane, MBA

Director, Strategic Inclusion and Partnership Development

Carrie Vann

Director of Membership

MODERATOR

LaJuan Campbell

Senior Manager, Volunteer Relations

Innovation in Action: Featured Grant Recipients

- **Women's Initiative (WIN) programs**

WIN'S BRAINERD LAKES RETREAT

October 09, 2026 - October 11, 2026
6:00 PM - 11:00 AM
Add to Calendar

Madden's On Gull Lake
11266 Pine Beach Peninsula Rd
Brainerd, MN 56401
Directions

Post Share Share



TICKETS

$750.00 Dinner Cruise Sponsor

$500.00 Lunch & Presentation Sponsor

$350.00 Bonfire & Hot Topics Sponsor

$0.00 Retreat Gift Sponsor (in-kind)

REGISTRATION

Members: $200
Non-members: $250

REGISTER NOW

CONTINUING EDUCATION

This seminar is approved for 5 hours of appraisal continuing education by the Minnesota Department of Commerce.

This seminar is approved for 5 hours of real estate continuing education by the Minnesota Department of Commerce.

ABOUT THE RETREAT

Join the North Star Chapter's Women's Initiative Network for a memorable retreat at Madden's on Gull Lake. This event brings together women and men across the profession to build connections, support professional growth, and advance women in appraisal—all while enjoying valuable education and a beautiful Brainerd Lakes setting.



CLP | CHAPTER LEADERSHIP PROGRAM

LDAC 2027

Appraisal Institute®

Grow your leadership. Strengthen your voice.

Leadership Development and Advisory Council (LDAC)

SAVE THE DATE

May 26–28, 2027 | Washington, DC

Explore LDAC 2027. Registration opens February 2027!



LDAC
LEADERSHIP DEVELOPMENT AND ADVISORY COUNCIL

Scan to explore

CLP CHAPTER LEADERSHIP PROGRAM

Q3 VOLUNTEERS OF DISTINCTION

Congratulations to our Q3 2026 Volunteers of Distinction!

Brad Hevenor, MAI
Massachusetts and Rhode Island Chapter

Beth L. Graham
Great Lakes Chapter

Brian Crowder, MAI, SRA
North Carolina Chapter

Jennifer O. Simmonson, MAI
San Diego Chapter

Jeffrey T. Miller, MAI, AI-GRS
Atlanta Area Chapter

Know an AI member whose service deserves a spot on this slide?

Scan to nominate

Appraisal Institute®

CLP CHAPTER LEADERSHIP PROGRAM

2027 APPRAISAL INSTITUTE AWARDS

Great work deserves recognition.

Know someone whose work deserves recognition? Nominate them for one of these awards:

- **J. Scott Robinson Lifetime Achievement Award**
- **Outstanding Service Award**
- **William S. Harps DEI Award**
- **Women’s Initiative SPOTLIGHT Award**

Nomination deadline: December 1, 2026

Scan to nominate

Appraisal Institute®

APPRAISAL INSTITUTE · 2026 CHAPTER LEADERSHIP PROGRAM

Introducing New Tool for Chapter Success:

Professional Coaching

October 22, 2026 · Chicago, IL

Dr. Daralee Barbera

President, DPC, LLC (Diversified Professional Coaching)

The Right Coach Changes Everything.

Diversified Professional Coaching, LLC

OUR FORTY MINUTES

Four questions, one next step

1

Who is DPC?

A coaching collaborative many of you have already met.

2

Why have a coach?

What a coach adds that a busy volunteer leader cannot add alone.

3

What are the programs?

Individual, Group, MasterMind, BEE, and Strategic Planning.

4

What makes DPC better?

Certified, diversified, tailored, and ready for your chapter.

Your next step: a MasterMind session for your chapter, brought to you by AI Headquarters at no cost.

DPC AND THE APPRAISAL INSTITUTE

We already work alongside you

2025

Las Vegas

Val Expo, August 11–13: DPC conducted impactful MasterMind sessions for the Appraisal Institute.

2025

San Diego

Chapter Leaders Conference: nine MasterMind sessions, grouped by small, medium, and large chapters.

2026

Nashville

National Conference: Conference Coaching and MasterMind sessions for attendees.

Now

Region 10

A six-month Region Session Model, under way with chapter leaders today.

Most recently, we spoke at the Region 10 Leadership Session.

WHO WE ARE

Who is DPC?

Diversified Professional Coaching, LLC is a coaching collaborative. We link certified professional coaches from business, government, education, sports, and financial services with the leaders who need them.

2020

Year founded

58+

Certified professional coaches, across 13 specialties

3

Regions served: United States, Canada, and Asia Pacific

Every DPC coach holds the Certified Professional Business Coach (CPBC) designation and recertifies every year.

THE CHAPTER LEADER'S CHALLENGE

Leading an organization or managing activity?

A chapter can be busy and still be under-organized. Meetings, courses, committees, and events do not automatically create shared direction.

Activity

Busy, but fragmented

Effort without shared priorities

Hard work, uncoordinated execution

Organization

Aligned, prioritized, accountable

Clear ownership and measures

Follow-through people can see

Volunteer organizations need more clarity, not less; positional authority is limited.

THE OPERATING FRAMEWORK

Every chapter needs five things

1

Roles

Who owns what?

2

Goals

What are we trying to accomplish?

3

Strategy

How will we accomplish it?

4

KPIs

How will we know we are succeeding?

5

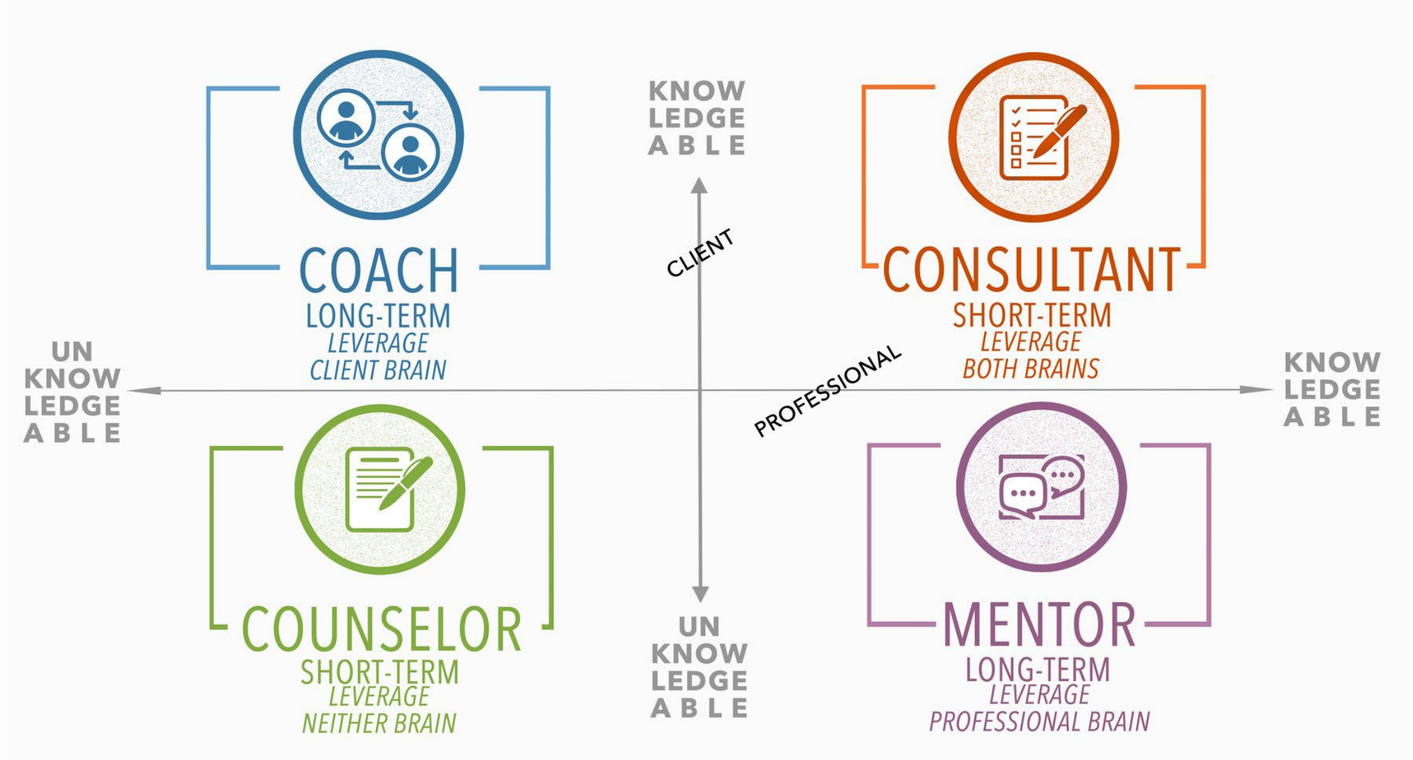
Accountability

Who follows up, and when?

KPIs are Key Performance Indicators: the few measures that tell you whether the plan is working.

A strategic plan that nobody reviews is not a strategic plan. It is a document.

What kind of help creates value?



Mentor

The professional has experience the client lacks; leverage theirs over time.

Consultant

Both bring knowledge; leverage both brains for a defined need.

Coach

You know your situation best; a coach leverages your thinking over time.

A coach does not need to know your chapter better than you do. That is the point.

WHY HAVE A COACH?

What a coach adds to a volunteer leader

Clarity

Turn what you already know about your chapter into clear priorities and better decisions.

Accountability

Someone follows up, on a schedule, so good intentions become completed actions.

Perspective

An outside view from a certified professional, free from sales or product bias.

Continuity

Officers change every year. A coached plan and its momentum carry forward.

You volunteer your time. A coach helps make sure that time is well spent.

DPC COACHING PHILOSOPHY

We start where you are

Tailored coaching begins with the coachee: your strengths, your goals, and your circumstances. The plan is yours; the coach helps you build it and keep it moving.

1

Listen

The first meeting establishes the relationship and what matters most to you.

2

Assess

Where useful, tools such as DISC, a One Page Business Plan, or the BEE give a shared baseline.

3

Plan

Together we define goals, clarify strategies, and agree on action steps.

4

Act

You execute; your coach supplies guidance, accountability, and momentum.

Your coach helps you get there based on what is important to you.

PROGRAM OPPORTUNITIES

Two ways coaching serves your chapter

For the chapter

Presidents, boards, and Executive Directors (EAs) leading the organization.

- MasterMind sessions
- Group Coaching
- Strategic Planning
- Region Session Model

For each member

Individual appraisers strengthening their own business operations.

- Individual Coaching
- Business Effectiveness Evaluation (BEE)
- Leadership Effectiveness Evaluation (LEE)

Dr. Daralee Barbera
https://divprocoach.com/

PROGRAM 1 · INDIVIDUAL COACHING

One-on-one, confidential, built around you

Personal and confidential meetings tailored to the coachee's specific needs, with text, email, and phone access between sessions.

How often

Weekly	Four 60-to-90-minute sessions a month
Bi-weekly	Two 60-to-90-minute sessions a month
Monthly	One 60-to-90-minute session a month

Common areas of focus

- Mission, vision, and core values
- Goal attainment and action plans
- Leadership
- Profitability and strategic planning
- Marketing and sales systems
- Client experience

A good fit for a member growing an appraisal practice, or a leader growing into the role.

PROGRAM 2 · GROUP COACHING

Learning with peers, guided by a coach

A facilitated, peer-based experience with a defined topic each session. It is also an economical way to access professional business coaching.

One-day session

A focused day of coaching for the group; eight hours is typical.

Cohort coaching

One 60-to-90-minute group session a month, plus a 30-minute individual session for each member.

90-day program

Six facilitated sessions with pre- and post-assessments, focused on practical application.

For Appraisal Institute groups: 5 to 10 members, in sessions of up to two hours.

How a MasterMind works

A facilitated, peer-learning session that draws on the collective wisdom of the group to solve real leadership and business challenges. No lectures and no slide decks; just structured, confidential conversation.

Your chapter's first one-hour session is offered on behalf of AI.

1 Clarify your focus
Choose one current, meaningful issue.

2 Frame the issue
What is happening, why it matters, the outcome you want.

3 Reflect in advance
What does success look like? Where are you stuck?

4 Prepare to contribute
Listen deeply; offer perspectives, not prescriptions.

5 Commit to the norms
Confidentiality, candor, and full presence.

PROGRAM 4 · BUSINESS EFFECTIVENESS EVALUATION (BEE)

An honest baseline for a member's business

100 questions measuring overall business effectiveness

10 areas of focus, one coached each month

12 months, from baseline to post-evaluation

The ten areas

- Strategic Planning
- Marketing
- Sales
- Client Experience
- Human Resources
- Business Systems
- Exit and Succession Planning
- Financial Management
- Leadership
- Personal Effectiveness

Its companion, the Leadership Effectiveness Evaluation (LEE), does the same for leadership skills.

PROGRAM 5 · STRATEGIC PLANNING

Strategic planning for leaders, boards, and EAs

The Strategic Facilitation Program moves a leadership team from ideas to execution with clarity, alignment, and accountability.

1

Surface

Structured brainstorming of opportunities, risks, and strategic challenges.

2

Prioritize

Rank initiatives by impact, feasibility, and alignment.

3

Define

Clear strategies supported by measurable KPIs.

4

Commit

Next steps with owners, timelines, and success criteria.

We prefer a six-month commitment, so the plan is reviewed and acted on, not only written.

Dr. Daralee Barbera
https://divprocoach.com/

The model in use with Region 10

A six-month program for chapter leadership teams across a Region.

MONTH 1

Group session one

Build the plan: roles, goals, strategy, KPIs, and accountability.

MONTH 3

Group session two

Execution check: what launched, what stalled, what to adjust.

MONTH 5

Group session three

Mid-point review against the numbers each chapter set.

In months 2, 4, and 6: thirty minutes with your chapter's own coach.

Accountability means someone follows up. In this model, that someone is your coach, every month.

ALSO AVAILABLE

More ways DPC can support you

Conference Coaching

Complimentary 20-minute individual sessions with certified coaches, offered to attendees as a conference benefit.

Speakers Bureau

Expert speakers for keynotes, breakouts, and group presentations, adapted to the needs of your event.

Leadership Evaluation (LEE)

The Leadership Effectiveness Evaluation: a 100-question assessment and 12-month program that develops communication, decision-making, and team leadership.

One relationship, many ways to help: choose what creates value for your chapter.

WHAT MAKES DPC BETTER

Why DPC fits Appraisal Institute members

Certified	Every coach holds the CPBC designation and recertifies every year.
Diversified	58+ coaches with backgrounds in business, government, education, sports, and more.
Tailored	Coaching starts where you are, not from a script.
Unbiased	Professional facilitation with no sales or product agenda.
Proven with AI	San Diego in 2025, Nashville in 2026, and Region 10 today.
Ready	A DPC team has already been identified for your chapter.

The Right Coach Changes Everything.

INVESTMENT DISCIPLINE

The Price–Value Formula

Value > Price

a potential good investment

Value ≤ Price

do not buy it

Price is easy to see. Value requires judgment.

The formula applies to everything: an education program, a conference, technology, a speaker, a consultant, or coaching.

If the value does not exceed the price, you should not purchase it.

A good formula to apply.

APPRAISAL INSTITUTE AGREED PRICING

DPC coaching rates for AI chapters

SERVICE	RATE	WHAT TO KNOW
One-on-One Coaching	**$350** per hour	Master Coach rates are negotiated.
Group Coaching	**$250** per person, per session	Groups of 5 to 10 members; sessions of up to two hours.
MasterMind Sessions	**$250** per person, per session	First one-hour session offered on behalf of AI. Regular sessions: 5 to 10 members, up to two hours.
Six-Month Region Session Model	**Tailored pricing** per month	Six months preferred, as sessions are designed around the Regional goals.

PAYING FOR IT

Where will the funding come from?

CHAPTER COACHING

From your Region or your chapter

Coaching that improves chapter operations can be funded by the Region your chapter belongs to, or by the chapter itself.

INDIVIDUAL COACHING

From the member

Members fund their own coaching to enhance their personal business operations.

YOUR FIRST MASTERMIND

From AI Headquarters

Brought to your chapter at no cost to you. It is the easiest way to see the value before you spend anything.

Apply the formula: fund what creates more value than it costs.

WHAT HAPPENS NEXT

Your DPC team is ready

We have already identified the DPC team for each chapter. Three steps put that team to work.

1

Contact Lizz at DPC

Tell her your chapter and a few dates that work.

2

Schedule your chapter MasterMind

One hour, brought to your chapter by AI Headquarters at no cost.

3

Meet your DPC team

Presidents and EAs meet with the team to decide the best way for us to assist.

Stronger chapter leadership, and stronger member businesses.

YOUR NEXT STEP

Schedule your chapter MasterMind

Brought to your chapter by AI Headquarters at no cost.

TO SCHEDULE

Lizz

Lizz@divprocoach.com

QUESTIONS

Dr. Daralee Barbera

Daralee@divprocoach.com

Diversified Professional Coaching · www.divprocoach.com · info@divprocoach.com

The Right Coach Changes Everything.

Diversified Professional Coaching, LLC

Membership Engagement: Collaborative Deep Dive and Takeaways

- **Groups broken into:**
  - **Small Chapters <150 members**
  - **Medium Chapters 151-350 members**
  - **Large Chapters >350**

St. Clair Ballroom –Salon 2 Room

- **(Large)** - Atlanta Area, Chicago, Colorado, Florida Gulf Coast, Houston, North Carolina, North Texas, Northern California, and Southern California Chapters

St. Clair Ballroom –Salon 3 Room

- **(Medium) -** Alabama-Mississippi, Central Texas, East Florida, Great Lakes, Greater Oregon, Hoosier State, Louisiana, Massachusetts Rhode Island and Maine, Metro New Jersey, Metropolitan New York, North Star, Ohio, Philadelphia Metropolitan, Phoenix, San Diego, Seattle, South Carolina, South Florida, Tennessee, Utah, Virginia Commonwealth, Washington DC Metropolitan Area, Washington Idaho Montana, and Wisconsin Chapters

St. Clair Ballroom –Salon 1 Room

- **(Small) -** Alaska, Arkansas, Austin, Bluegrass, Connecticut, Delaware, Greater Kansas State, Greater St. Louis, Hampton Roads, Hawaii, Iowa, Kansas City, Keystone, Long Island, Maryland, Mid-Hudson, Nebraska, Nevada, New Hampshire – Vermont, Northeast Florida, Northeast New Jersey**,** Oklahoma Ozark, Puerto Rico and Caribbean, Rio Grande, Savannah Area, South Texas, Southern Arizona, Southern New Jersey, Upstate New York, Western Pennsylvania, and Wyoming, North Dakota, and South Dakota

OR
Grand Ballroom
Stay and chat with Dr. Daralee Barbera,
President of Diversified Professional Coaching (DPC), LLC

Breakout Rooms

