



RMA HOW-TO GUIDE: DEVELOPING A REGIONAL EVENT OR ROUND TABLE FOR GENERAL MEMBERSHIP

OBJECTIVE

Regional peer-sharing events and round tables are designed to pull together members from multiple chapters to cover larger geographical areas/regions. These events may cater to specific topics or functional groups.

In order to maximize the effectiveness of round tables, these meetings should be limited to a maximum of 25 members. Regional events should be considered if a larger group needs to be served. Regional events have no maximum on the number of attendees (unless space is limited).

TIMING AND LOCATION

The length of the meeting can range from a couple of hours, to a half day, to a full day. The half day format generally works well with travel times if an overnight stay is not desired and attendees are traveling from a wider geographical area.

The location of the meeting could impact the attendance at the meeting. Try to find a space that is centrally located, easily accessible and affordable to attendees. Discuss options with the group, understanding that meetings may be held in different locations with each offering.

ORGANIZATION/GOVERNANCE

A single chapter should be responsible for taking the lead (chairing) for the initiative, which may include (but not be limited to) securing a location, moderator (if needed), sponsor, food/beverages, managing registration, and fee collection etc.

It is suggested that the lead chapter create a committee with the surrounding chapters that will be partnering on the initiative. The committee would then be responsible for marketing the event in each participating chapter or sending invitations to the target audience. If the event is recurring, it is suggested that the event rotate among the participating chapter locations with each chapter taking a turn at hosting and chairing. RMA HQ and your Regional Manager can also help by providing speaker suggestions, if needed. It is also recommended an icebreaker take place before the event begins or at its start.

Prepare to have local and national RMA marketing materials available for distribution and discussion at your event. Ask a member of the hosting chapter to welcome participants on behalf of all participating chapters.

COSTS AND PRICING

The committee would be responsible for determining if the purpose of the event is to financially cover cost only or generate income. If there is no intent to generate income, the estimated expenses could be covered by a sponsor, host chapter, or a fee that is minimal and only covers cost. If income is generated, it should be determined in advance how it will be allocated among participating chapters. One example would be to divide income by the number of participants (ex. $\$100/10=10$) then rebate each participant's chapter by that amount.

Typical expenses incurred include:

- Meeting room rental fee (consider asking a bank to donate space to save on expense).
- Food and beverage minimums.
- Speakers and/or moderator.
- Gifts for speakers and moderators.
- A/V equipment and other supplies.

Sponsors are encouraged for events. When selecting a sponsor consider the topic and work to find a partner that relates. For example, an appraisal manager round table sponsor may be an external evaluation provider, an environmental consultant or real estate data provider. Set the sponsorship parameters prior to recruiting (i.e., financial commitment from the sponsor, short speaking arrangement at event, advertisement on event marketing materials, etc.).

TARGET AUDIENCE

The target audience will be driven by the topic or functional group. For example, if the event is a certain industry's peer-sharing, the target audience would be members involved in the particular industry (See Oil and Gas Example). If the event is a round table for chief credit officers, then the target audience would be chief credit officers from institutions within each participating chapters' footprint. The invitations for events that are member driven could be invitation only or broadcast to the general membership and open for anyone who serves in the functional capacity in their organization.

ANTI-TRUST GUIDELINES

RMA operates these types of events under very specific antitrust guidelines. The antitrust laws are designed to ensure that business is conducted in an open, competitive atmosphere and that competition should not be unreasonably restricted. The challenging aspect of antitrust laws is that it is complicated and the general language in which the statutes are written does not specify the exact conduct that would be considered a violation. The RMA guidelines include:

- What is prohibited.
- What you should avoid.
- What you can do.

Therefore, we must be very careful in the event setting to review and follow all guidelines set forth by RMA. A copy of the RMA antitrust guidelines should be printed and provided to each participant and reviewed prior to the beginning of the meeting.

BENEFITS

- Collaboration and networking opportunities for a broader group of chapter leaders.
- Knowledge, best practice sharing, and networking across a broader membership group.

OBSTACLES

- No chapters in close proximity to create regional event or round table.
- No interest or time of chapters in close proximity to collaborate on a regional event or round table.

EVENT EXAMPLES

Round tables:

- **Carolinas-Virginias Appraisal Manager Round Table**

This round table is hosted by the Carolinas-Virginias Chapter semi-annually in North Carolina and annually in Virginia. The event is limited to 20 participants and targets chief appraisers and appraisal managers in community banks with assets size of \$10 billion and less. The program runs from 9 a.m. to 2 p.m. with the first hour dedicated to a regulatory update or specialized presentation. The agenda is suggested by the participants during registration. A moderator from a large bank's appraisal department is invited to moderate the discussion. The events are held in the central part of the state in bank or law firm board rooms, which eliminates the cost for room rental. Each event is sponsored by either a real estate data or evaluation provider. The sponsorship covers the cost of the lunch provided and allows the sponsor to speak for 15 minutes on their products and services. Expenses incurred include bagels/pastries, coffee, soda and water for the morning, and moderator and speaker thank you gifts. The fee to attend is kept to a minimum of \$25 for members and \$40 for nonmembers. This round table has been very effective in the markets served.
- **Oil and Gas/Energy Lending Success Round Table**

The Oil and Gas Lending Success Round Table is held by the MidSouth Chapter annually in September in New Orleans. The event is invitation only to senior banking executives across the country who are involved in oil and gas lending. The event is open to 20 participants, and is held from 10:00 a.m. to 2:00 p.m. The morning session focuses on exploration and production lending, followed by a lunch with a speaker and an afternoon session focusing on oilfield services. The chapter charges \$250 per participant, which covers the cost of food, and makes for a healthy profit on the event. The chapter provides gift cards to the moderators of the round table. The round table is held in a local bank's board room, free of charge. Participants are then invited to a conference call six months after the event to regroup and discuss any changes in the industry or any current regulatory concerns. The event has won the MidSouth Chapter the Circle of Excellence Award from RMA in the past.
- Real Estate Round Table (appraiser, banker, environmental).
- Chief Credit Officer Round Table.
- Credit Analyst Round Table.
- Operational Risk Round Table.

RMA RESOURCES

<http://www.rmahq.org/conducting-local-round-tables/>

- [Antitrust Guidelines](#) (PDF).
- [RMA Round Table Critique Template](#) (Word).
- [RMA Round Table Topic Questionnaire](#) (Word).
- [Sample Round Table Invitation](#) (Word).

JOIN. ENGAGE. LEAD.