

**BEING AN AE
IS EASY.
IT'S LIKE RIDING A BIKE.
EXCEPT THE BIKE IS ON FIRE.
YOU'RE ON FIRE.
EVERYTHING IS ON FIRE.**

**I CAN'T FIX
STUPID
BUT I'M A
FAIRLY
DECENT
AE**

AE BOOTCAMP



Cynthia Walsh, CAE RCE

2023





Agenda

Meet your trainer

Warm Up

Cardio

Cool Down

Stretching

Meet the presenter

Cynthia is the CEO of the Brunswick County Association of REALTORS located at the southern beaches of North Carolina (don't be jelly).

18 Years

RCE, CAE

IT/Tech

Mom



What I looked like when I started in 2005

INTROS

1

NAME

2

WHERE ARE YOU FROM – INCLUDE STATE

3

HOW MANY MEMBERS?

4

HAVE YOU EVER WORKED IN AN ASSOCIATION BEFORE?

5

HOW LONG HAVE YOU BEEN RING LEADER?

Warm Up

Let's Start at the Beginning

Warm Up

A GROUP OF PEOPLE (AKA MEMBERS) ORGANIZED FOR A JOINT PURPOSE

LOCAL LEVEL OF THE LARGEST TRADE ASSOCIATION IN THE US

NAR OVER 1.5 MILLION MEMBERS

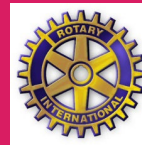
GA OVER 46,000

NCR OVER 54,000

VA OVER 36,000

OVER 100,000+ ASSOCIATIONS IN US

WASHINGTON DC



THERE'S AN ASSOCIATION FOR EVERYTHING



National Bartender Association
www.Bartender.org

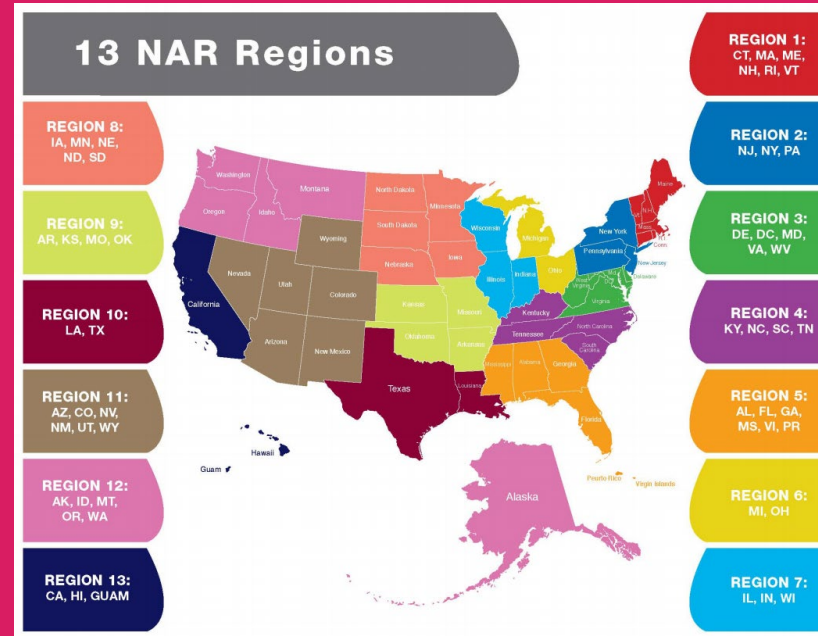


Association for Pet Obesity Prevention
www.PetObesityPrevention.org



American Miniature Llama Association
www.IWantALLlama.net

THREE WAY AGREEMENT



OVER 900 ON NAR BOD

1090 LOCAL ASSOCIATIONS/BOARDS

Articles of Incorporation & Charter

Bylaws

Policy

Employee Manual

Employee Job Descriptions

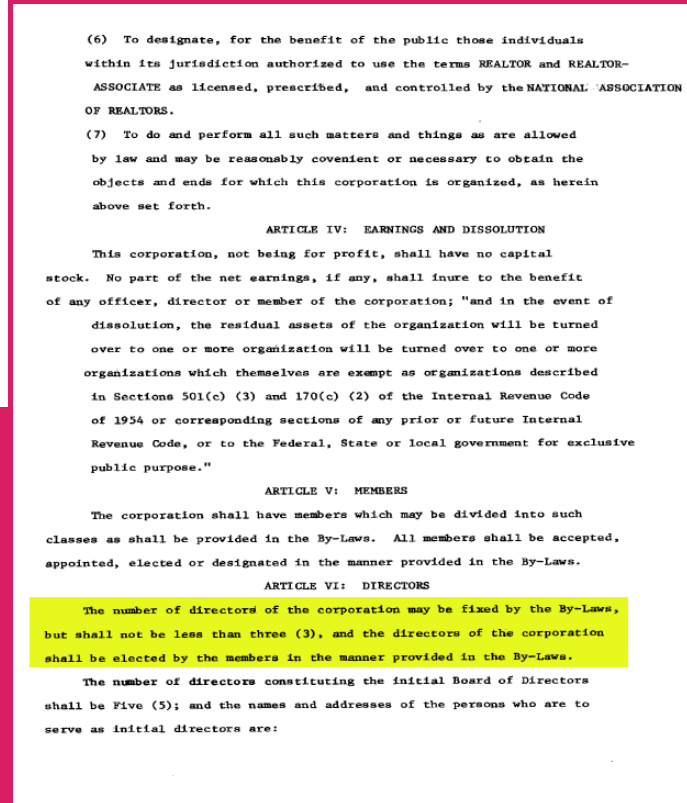
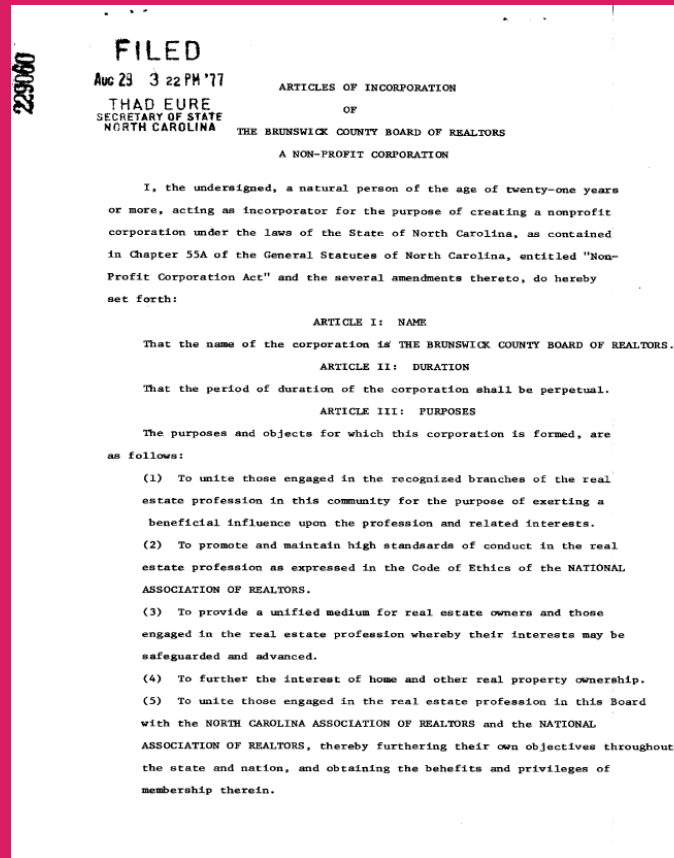
Association Attorney

Supplies



Articles of Incorporation

- Name
- Profit or Non
- Specifics
- Accuracy



Bylaws

Governing Rules for Operation

- Purpose
- Membership Requirements/Qualifications
- COE
- Pro Stands
- Ⓜ
- State & National Membership
- Dues & Assessments
- Meetings
- Committees
- Fiscal Year
- Rules of Order
- Amendments
- Dissolution

Table of Contents	
ARTICLE I – NAME.....	4
SECTION 1. NAME.....	4
SECTION 2. REALTORS®.....	4
ARTICLE II – OBJECTIVES.....	4
SECTION 1. PURPOSE TO UNITE.....	4
SECTION 2. CODE OF ETHICS.....	4
SECTION 3. SAFEGUARD AND ADVANCE.....	4
SECTION 4. FURTHER INTERESTS.....	4
SECTION 5. ASSOCIATION WITH STATE AND NATIONAL.....	4
SECTION 6. USE OF THE TERM REALTOR®.....	4
ARTICLE III – JURISDICTION.....	5
SECTION 1. TERRITORIAL JURISDICTION.....	5
SECTION 2. TERRITORIAL JURISDICTION DEFINED.....	5
ARTICLE IV – MEMBERSHIP.....	5
SECTION 1. CLASSES OF MEMBERSHIP.....	5
(1) REALTOR® Members.....	5
Franchise REALTOR® Membership.....	6
Primary and Secondary REALTOR® Members.....	6
Designated REALTOR® Members.....	6
(2) Institute Affiliate Members.....	6
(3) Affiliate Members.....	7
(4) Public Service Members.....	7
(5) Honorary Members.....	7
(6) Student Members.....	7
ARTICLE V – QUALIFICATION AND ELECTION.....	7
SECTION 1. APPLICATION.....	7
SECTION 2. QUALIFICATION.....	8
(a) Sale Proprietor, Partner, Corporate Officer or Branch Office Manager.....	8
(b) Licensed Employee or Independent Contractor with a DR.....	9
(c) Pending Ethics Complaint or Arbitration Request.....	9
SECTION 3. ELECTION.....	10
(a) Application.....	10
(b) Qualification & Election.....	10
(d) Rejection of Application.....	11
SECTION 4. NEW MEMBER CODE OF ETHICS ORIENTATION.....	11
SECTION 5. CONTINUING MEMBER CODE OF ETHICS TRAINING.....	11
SECTION 6. STATUS CHANGES IN MEMBERSHIP.....	12
(a) REALTOR® Requirements for Change in Status.....	12
(b) Application Fees Previously Paid.....	12
(c) Dues.....	12
ARTICLE VI – PRIVILEGES AND OBLIGATIONS.....	13
SECTION 1. PRIVILEGES AND OBLIGATIONS SPECIFIED.....	13
SECTION 2. FAILURE TO ABIDE BY BYLAWS AND RULES AND REGULATIONS.....	13
SECTION 3. DISCIPLINE FOR VIOLATIONS OF THE CODE OR DUTIES OF MEMBERSHIP.....	13
SECTION 4. RESIGNATION.....	13
SECTION 5. RESIGNATION/TERMINATION WITH PENDING ETHICS COMPLAINT.....	13
(a) Resignation/Termination with Pending Arbitration.....	14

2018 Bylaws Reboot
All changes reflected in the following pages are to restore BCAR's Bylaws to NAR model.
Bylaws. ¶

Text with strike though must be deleted ¶

Text that is yellow must be added ¶

Text that is stricken and blue must be deleted and can be considered for policy ¶

Text that is grey is optional ¶

Text that is purple are recommended changes by Attorney.....Page Break.....¶

membership, after making payment in full of all-in-ation. ¶

res.—Deposits and expenditures of funds shall be in- l by the Board of Directors. ¶

ines Late Fees, Assessments, and Other Financial e—shall be sent of All dues, fees, fines late fees, ligation to the Association or Association Multiple- delinquent Association Member in writing setting e. ¶

other Dues.—The dues of REALTOR® Members whoe d by the National Association), Past Presidents and sation or recipients of the Distinguished Service : Board of Directors. ¶

NOTE: A Member Board's dues obligation to the National Association is reduced by an amount equal to the amount which the association is assessed for a REALTOR® member, times the number of REALTOR® Emeriti (as recognized by the National Association), past presidents and past treasurers of the National Association, and recipients of the Distinguished Service Award of the National Association who are REALTOR® members of the association. The dues obligation of such individuals to the local association should be reduced to reflect the reduction in the association's dues obligation to the National Association. The association may, at its option, choose to have no dues requirement for such individuals except as may be required to meet the association's obligation to the State Association with respect to such individuals. Member Boards should determine whether the dues payable by the association to the State Association are reduced with respect to such individuals. It should be noted that this does not affect a "designated" REALTOR®'s dues obligation to the association with respect to those licensees employed by or affiliated with the "designated" REALTOR® who are not members of the local association. ¶

• ARTICLE XI — OFFICERS AND DIRECTORS ¶

Section 1. Officers.—The elected officers of the Association shall be: President, President-Elect, and Treasurer.—The Treasurer shall be elected for a two-year term.—The President-Elect automatically assumes the office of President the year following their term as President-Elect.—The Executive Committee shall be composed of all officers elected by the General membership, or their successors, and the Immediate Past President of the Association. The term "Immediate Past President" shall mean the most recent past President who is will and able to serve in such capacity.—The Chief Executive Officer shall serve as the Association's Corporate Secretary, and the President-Elect and the Treasurer shall serve as Assistant Secretaries. ¶

Section 2. Duties of Officers.—The duties of the officers shall be such as their titles, by general usage, would indicate and such as may be assigned to them by the Board of Directors.—It shall be the particular duty of the Treasurer or staff designee Chief Staff

Executive to keep the records of the Association and to carry on all necessary correspondence with the National Association of REALTORS® and the North Carolina Association of REALTORS®. ¶

• Section 3. Board of Directors.—¶

Board of Directors Defined.—The governing body of the Association shall be a Board of Directors consisting of the President, President Elect, Treasurer, Elected Officers, the immediate past president of the Association, and an odd number of REALTOR® Members of the Association not to exceed nine (9) and not less than (3) and a REALTOR® Member of the Association designated by the Association's Lumberton Chapter ("Lumberton Chapter Director").—Directors shall be elected to serve for terms of three (3) years.—The Board of Directors shall have the responsibility to establish policy and procedures in order to assure compliance with the Bylaws of the Association, and shall be charged with the full responsibility and authority to carry out all business and professional activities of the Association. ¶

a. → Term Limits.—No director shall serve for more than two consecutive three-year terms. ¶

b. → Firm Limits.—No more than three (3) REALTORS® from the same real estate firm may simultaneously serve on the Board of Directors. ¶

→ Treasurer Term Limit.—The position of Treasurer may serve a maximum of two consecutive two-year terms.—(amended 10/14/11) ¶

→ Candidate Requirements of Service.—(amended 3/2011) ¶

Officer.—A candidate for election as an officer of the association must have previously served or is currently serving on the BOD for a period of 12 months prior to taking office, with the exception of Treasurer. ¶

Director.—Applicants for Director must have been a BCAR REALTOR® member a minimum of 2 years prior to taking office and must be in good standing.—No person may be a candidate for more than one position whether nominated by the Nominating Committee or by petition.—Applicants must have involvement in BCAR including a minimum of one (1) year service on a committee, task force, or similar activity, including attendance at BCAR sponsored functions.—The Lumberton Chapter Director shall not be subject to any of the requirements set forth in this subsection other than the requirement of being a REALTOR® Member in good standing.—(amended 4/20/16) ¶

President-Elect.—The President-Elect must have previously served two (2) years as a Director or Officer of BCAR or NLS Chain ¶

Policy

Operational Details

- Conflict of Interest
- Whistleblower
- Records Retention & Destruction
- Financial
 - Credit Cards
 - Reserves
 - Tech Replacement
- Pro Stands
- Awards & Recognition
- Condolences
- Officers & Directors job descriptions
- Committees & Task Forces
- Disaster/Crisis Management
- Harassment
- Association Office Closure/Calendar

¶
• **SECTION 1.¶**
¶
• 1.0 → **GENERAL OPERATING POLICIES¶**
¶
The following are current policies of the Brunswick County Association of REALTORS®. As the Board of Directors creates or amends policies, they will be added accordingly. (November 2004)¶
¶
The Bylaws and the MLS Rules and Regulations shall be the governing documents of the Association. The Strategic Plan directs the Mission and Vision of the Association and is the basis for programming. (June 2006)¶
¶
<POLICY #7>¶
The Board of Directors shall have the responsibility to establish policy and procedures in order to assure compliance with the Bylaws of the Association, and shall be charged with the full responsibility and authority to carry out all business and professional activities of the Association.¶
¶
¶
<POLICY #9> STRIKE¶
There shall be a Chief Executive Officer, appointed by the Board of Directors, who shall be the chief administrative officer of the Association. The CEO shall have the authority to hire, supervise, evaluate, and terminate other staff in accordance with state and federal labor laws. The Executive Committee will supervise all hiring and termination recommendations of the CEO to ensure compliance with federal and state labor laws. The CEO shall perform other duties as prescribed by the Board of Directors or the Executive Committee. The CEO shall be a non-voting member of the Board of Directors and the Executive Committee without a vote. <RECOMMENDING NOT ADD TO POLICY, IT IS IN BYLAWS ARTICLE XI, SECTION 7>¶
¶
<MOVED FROM 1.10>¶
the State Directors will be the President, Past President and President-Elect. In the event we qualify for additional directors, the President will appoint, subject to the approval of the Board of Directors additional State Directors. (April 2006, Added PP removed VP 11/10, PP removed VP added 8/11, PP added VP removed 3/13)¶
¶
<MOVED FROM 1.8.1>¶
NCRMLS Managers will be appointed annually by the Board of Directors for staggered 2 year terms. NCRMLS Managers must have served on the MLS Committee or Board of Directors.¶
¶
• 1.1 → **STRUCTURE RECORDS & RETENTION¶**
¶

33. Use of panels in place of Committees and the Board of Directors

Any matter brought before the Grievance Committee, Professional Standards Committee, or Board of Directors may be considered by a panel of members or Directors appointed by the President for that purpose (or, alternatively, by the Board's Executive Committee). Three (3) or more members shall constitute a panel of the Grievance and Professional Standards Committees that can

2018 OPERATIONS AND POLICY MANUAL REBOOT

All changes reflected in the following pages are to update our policy manual to align with policy and NC Statutes

Text with strike through suggested to be deleted

Text that is yellow suggested to be added

Text that is blue was identified in the Bylaws to be moved to Policy. The numbers given to these sections was noted by committee.

Text that is green was moved to another section of Policy manual.

Text that is purple follow up with NCR Policy/Attorney

Bylaws or Policy

	BYLAWS	POLICY
Antitrust Policy		X
Budget Policy		X
Bylaws Amendments	X	
CEO/AE Eval Process		X
Harassment Procedures		X
COE & Training	X	
Confidentiality, Conflict of Interest, Whistleblower		X
Consent to Serve Policy		X
Data Security, Social Media,		X
Directors & Officers (#, elections, term, firm limits, qualifications, removal, vacancies, voting)	X	
Dissolution	X	
Dues	X	
Financial Policy, Internal Controls, Investment Policy & Fiduciary Duties		X
Meetings (frequency, notice, quorum)	X	

	BYLAWS	POLICY
Membership	X	
Records, Access to & Retention		X
Purpose	X	
® Trademark	X	
State & National Membership	X	
Travel Policy		X
\$, Prices, Fees		X
Awards & Reconignition		X
Pro Stands & Citation Policy		X
Committee (establish, organization, attendance)	X	
Committees Specific		X

Employee Manual

- Harassment
- Communication
- Tech & Social Media
- Alcohol & drug abuse
- Privacy
- Safety
- Conflicts of Interest
- Confidentiality
- Employment Relationship (absences, sick, vacation, pay)
- Disciplinary Procedure
- Benefits
- Credit Card/Expense Reports/Per Diem
- Dress Code
- Office Hours – Calendar
- <https://www.nar.realtor/ae/strategic-association-management/sample-employee-manual>

TABLE OF CONTENTS

Employment at Will

Equal Opportunity and Commitment to Diversity

Equal Opportunity
Commitment to Diversity
Americans with Disabilities Act (ADA) and Reasonable Accommodation
Harassment and Complaint Procedure
Sexual Harassment Policy
Workplace Retaliation

Conflicts of Interest and Confidentiality

Conflicts of Interest
Confidential Information
Work Made for Hire

Employment Relationship

Employment Classification
Work Week and Hours of Work
Meal and Rest Breaks
Time Records
Overtime
Deductions from Pay
Paychecks
Access to Personnel Files
Employment of Relatives and Domestic Partners
Separation from Employment

Workplace Safety

Commitment to Safety
Drug-Free and Alcohol-Free Workplace
Smoke-Free Workplace
Preventing Workplace Violence
Medical Emergencies and Workplace Injuries
Emergency Closings

Workplace Guidelines

Attendance
Working Remotely and Alternative Work Schedules
Outside Employment
Office Attire
Voluntary Office Romances
Endorsement of Association Officer Candidates

Endorsement of Candidates for Committees, Subcommittees and Forums
Social Media Policy
Bulletin Boards
Solicitation
Computers, Internet, Email, and Other Resources
Fraud Policy
Job Performance
Disciplinary Procedure

Time Off and Leaves of Absence

Holidays
Vacation
Sick Leave
Military Leave
Bereavement Leave
Jury Duty
Time Off for Voting

Employee Benefits

Medical, Dental, and Vision Insurance
Group Life Insurance
Short-Term Disability
Long-Term Disability
401(k) Plan
Workers' Compensation
Employee Assistance Program

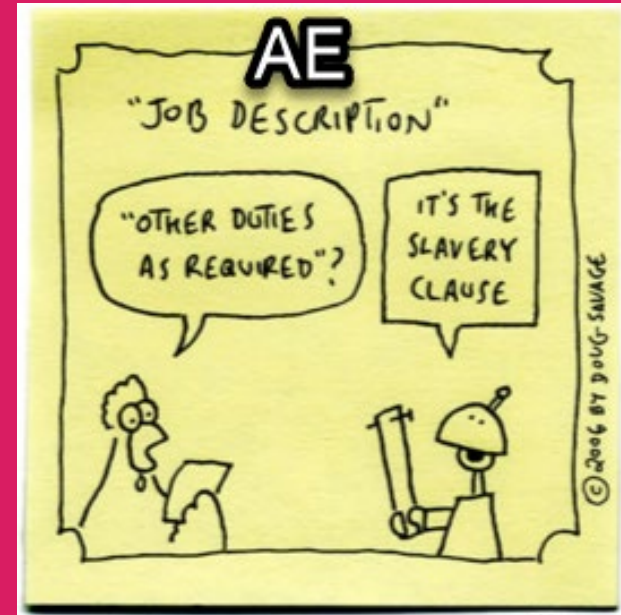
Employee Handbook Acknowledgment and Receipt

Employee Job Descriptions

- Describe Minimum Qualifications (degree, professional designation, etc.)
- Accurately reflect duties
- Physical Requirements
- Time Requirements
- Mission, Vision & Values
- Good Attendance
- Ability to work well with others

<https://www.nar.realtor/ae/manage-your-association/human-resources-toolkit/recruitment/sample-job-descriptions>

SAMPLES



Calendars

Annual Planning

Office Schedule

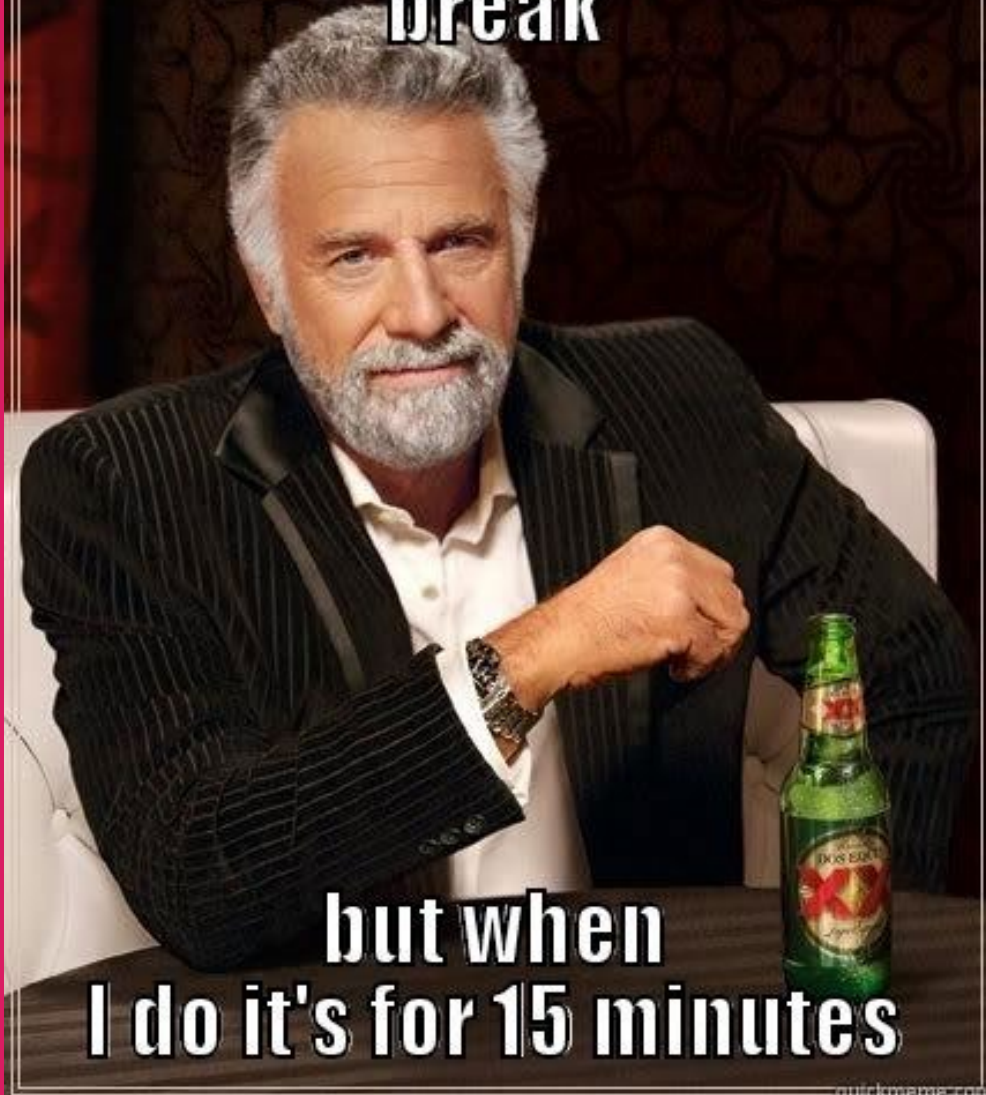
<https://www.nar.realtor/association-executives/association-planning-calendar>

State Calendar

CAUTION:
Dates on calendar are
CLOSER than they appear.



**I don't always take a
break**



**but when
I do it's for 15 minutes**

quickmeme.com

Cardio



Professional Standards

Financials

Supplies



Professional Standards

- Background
- Training – BUT I DON'T GET IT
- Forms
- Template Letters
- Timeline
- Grievance Committee
- Hearing Panel
- Attorney
- Policy
- Mediators & Ombudsman



Professional Standards Overview

From the time a complaint is received by BCAR to the time Pro Stands receives it, approximately 2 months

Time Line of a Complaint

1. Complaint Received
2. Grievance Committee meets
 - a. Approves as complaint
3. Respondent must provide response (15 days)
4. Copies of Response sent to Complainant
5. Copies of Complaint & Response sent to Pro Stands Chair
6. Pro Stands panel members sent to Complaint & Respond for challenge (10 days)
7. Panel named (15 days after challenge expires)
8. Hearing notice (21 days in advance)
9. Notice of Witnesses & Counsel (15 days before hearing)
10. HEARING
11. Transmit Decision (5 days after filed)
12. Request rehearing (20 days after decision received)

Grievance		Date Action Performed	Date MUST Complete	Actual Rcvd or Completion Date	
				Complnt	Rspndnt
Response Requested from Respondent	15 Days - From complaint being mailed				
Complainant Appeal	20 Days - From Receipt of Dismissal	N/A			
Pro Stands					
Respondent Must Provide Response	15 Days - From complaint being mailed			X	
Copies of Complaint & Response sent to Complainant, President & Chair of Pro Stands	5 Days - After received response		N/A	X	X
Challenge to Pro Stands Panel	10 Days - After being emailed				x
Panel Named	15 Days - After Challenge forms being mailed				
Hearing Notice	21 Days - In Advance of Hearing		N/A		
Notice of Witnesses and counsel	15 Days - In Advance of Hearing				
Transmit Decision	5 Days - After decision filed				
Request Appeal Hearing	20 Days - After transmittal of decision				

Financials

Profit & Loss (P&L v Budget) aka Income Statement

Balance Sheet

Financial Policy

CEO Authority to spend \$

Access to financials

Credit Cards

Reserves

Tech Replacement

Internal Controls

Review, Review, Audit



Internal Control Policy

Internal control, as defined by accounting and auditing, is a process for assuring an organization's objectives in operational effectiveness and efficiency, reliable financial reporting, and compliance with laws, regulations and policies. Internal control is a means by which an BCAR's resources are directed, monitored, and measured. It plays an important role in detecting and preventing fraud and protecting the organization's resources, both physical and intangible.

BCAR's current Internal Controls are as follows. Should these be added to Policy Manual or create a separate Internal Control Policy manual.

- Per the current Association Member Management system, daily batches are created for posting of payments. The person that creates the daily batch cannot be the same person that posts payments. The person that posts payments is not the same person that reconciles and closes the daily batch.
- The person that checks the daily mail is not the same person that post payments or enters payables received by vendors.
- The person that processes payables is not the same person that approves the invoices to be paid. A check signer must initial all invoices paid.
- The person that processes checks to vendors is not the same person that signs checks.
- The person that processes checks is not a signer on bank accounts.
- All checks must have two signatures.
- All blank checks must be stored in a locked location in the Association office.
- The person that makes deposits to the bank is not the same person that processes the payments. The person recording the deposits in the financial software is not the same person that made deposits at the bank.
- The Association financial staff employee completes month end reconciliations on all bank accounts and emails financial reports to an offsite CPA, approved by the Board of Directors. CPA reviews for accuracy.
- The Treasurer and President-Elect will review and sign a Financial Integrity report completed by the Association's financial staff employee.
- A monthly Balance Sheet & P&L verses Budget will be provide to the CEO, Treasurer, President-Elect and the Board of Directors.

- A CPA firm will conduct a yearly review and or audit (2 reviews, then audit) plus tax return filing per the Association Operations & Policy Manual. This will be presented to the Budget/Finance Committee, Executive Committee and the Board of Directors.
- A second CPA firm will conduct a monthly review of all month end financials, complete yearly 1099's and review tax returns, review and or audit performed by first CPA.

Budget

- BOD Packet – P&L v Budget
- PULL ALL INFO FIRST
 - Contract Matrix
 - Membership Stats
 - P&L & Balance Sheet
 - Strategic Plan
 - Payroll



Account	Type	Description	Non-Profit 2022-2023	Notes	NP or FP or Both
6400 - PROGRAM					
6400 - PROGRAM:6405 - Realtor Member Orientation	Expense				NP
6400 - PROGRAM:6405a - Affiliate Member Orientation	Expense				NP
6400 - PROGRAM:6415 - Installation	Expense			Venue rental and food for membership participation	BOTH \$0/\$0
6400 - PROGRAM:6480 - Strategic Plan	Expense			Scheduled for 11/1/2022	BOTH \$0/\$0
6400 - PROGRAM:6481 - Communications Coordinator	Expense	Public Relations Partner		CPI increase of 1.5% 2022-2023	BOTH \$0/\$0
		BOD approved 10/25/17 to increase contracted amount to include travel to NAR/NC Realtors events.			
6400 - PROGRAM:6482 - Governmental Affairs Contract	Expense				BOTH \$0/\$0
6400 - PROGRAM:6490 - Leadership Orientation	Expense			Includes Pro Stands Training for BOD, Pro Stands and Grievance	BOTH \$0/\$0
6400 - PROGRAM:6496 - Legislative/PR Event	Expense				BOTH \$0/\$0
6400 - PROGRAM:6498 - Affiliate Expo	Expense				NP
6400 - PROGRAM:6499 - BCAR Annual Election	Expense				NP
		Program Total			
6500 - OCCUPANCY					
6500 - OCCUPANCY:6503 - Office Cleaning & Supplies	Expense			\$1000.00 contracted price for Suite 5. Extra cleanings at \$100.00 per event/meeting w/food.	BOTH \$0/\$0
6500 - OCCUPANCY:6504 - Office Building Lease	Expense	5051 Main Street, Suite 5 - Shallotte Commons		Lease \$2975.00 & Common Areas \$899.50 = \$3874.00 monthly	BOTH \$0/\$0
6500 - OCCUPANCY:6504a - Pest Control Services	Expense	5051 Main Street, Suite 5 - Shallotte Commons		New GL Code - Unknown due to new location (Budgeted \$100.00 monthly)	BOTH \$0/\$0

BUDGET APPROVAL PROCESS

- ACCOUNTING & CEO
you know the numbers best
- CEO & TRASURER
First glance at how it will be accepted, where the questions might be
- BUDGET & FINANCE
I Schedule 1/2 day
- EXEC COMMITTEE
Changes - Suggestions
- BOARD OF DIRECTORS
Minimum 2 months before year end
- CELEBRATE
It's done, you're all set!



Calendars

ARE YOU GETTING THE PICTURE YET?



CAUTION:
Dates on calendar are
CLOSER than they appear.



Strength Training



Strategic Plan

Core Standards

Recruiting/Elections/Leadership Training

Supplies



Strategic Plan

- Strat Plan Committee
- Build to help with Core Stands
- Update BOD
- Annual Report
- Survey
- Vision & Mission
- <https://www.nar.realtor/ae/manage-your-association/strategic-planning-resources-toolkit>

SUMMARY Strategic Plan 2020-2023 YEAR 2 OF 3- 2020 Report

1. ADVOCACY GOAL FOLLOWING NAR'S "VOTE, ACT, INVEST" PROGRAM, THE BRUNSWICK COUNTY ASSOCIATION OF REALTORS® ("BCAR") IS THE LEADING ADVOCATE FOR PRIVATE PROPERTY RIGHTS AND REAL PROPERTY OWNERSHIP IN THE BCAR MARKET AREA. BCAR WILL CONTINUE TO BE THE MOST SOUGHT AFTER AND TRUSTED SOURCE OF INFORMATION FOR ALL ISSUES RELATED TO THE OWNERSHIP, USE OR TRANSFER OF REAL PROPERTY.

- A. Objective: VOTE;** Utilize NC REALTORS® and REALTOR® Party resources to ensure that members and consumers alike are registered to vote and participate in the election process.
- **Strategy I:** Create and execute on a Get Out the Vote effort; apply for a \$5000 NC REALTORS® Innovation Grant to create and produce a television ready commercial focused on a GOTV campaign.
 - **Strategy II:** Coordinate a voter registration campaign for all BCAR members as well as members of the community.
 - **Strategy III:** Link the voter registration materials to the BCAR website and point members to the link to obtain voter registration materials for inclusion in closing packets.

SUMMARY OF OBJECTIVE A
Created, applied for and received a SECOND Innovation Grant from NCR for a Get Out the Vote effort in 2021 to support municipal elections. Collaborated with Pioneer Strategies to assist with the creation and implementation of this plan. The goals of this effort were different than for the State/Federal Elections. Our focus is to education members and affiliates the importance of municipal elections, the importance of REALTORS voting, mobilize members and affiliates to share they voted and demonstrate the local impact of REALTORS voting on the local elections. We rolled this out at the beginning of the election cycle beginning with a series of reminders to register to vote. This was followed by early voting reminders, absentee voting and then messaging was shifted to the importance of REALTORS voting and your vote is your voice. The microsite created last year, bcarnc.com/americandreamway, was redesigned to reflect the municipal elections. A Facebook frame was developed for members to use to promote they voted. Several web video ads were created sharing why it is important to vote. A specific voter registration effort was not undertaken outside of the Get Out the Vote effort described above.

- B. Objective: ACT;** Expand and support property rights, housing and real property ownership by providing active campaign assistance to REALTOR® supportive candidates, ensuring that BCAR members are active in the political process and utilizing state and national resources which will allow BCAR to have a meaningful impact on local ordinances, laws and policy issues.
- **Strategy I:** BCAR will support private property rights, housing and real property ownership by providing active campaign assistance for local political candidates that are friendly to REALTOR® Party issues.

- a.** Tactic: Utilize 100% of RPAC funds available to support pro-REALTOR® local candidates identified through the interview process.

SUMMARY OF OBJECTIVE B – Tactic a
The Legislative Committee sent candidate surveys to all 115 persons running for office. These were submitted electronically – an online form was developed with a QR code for easy access. These surveys were reviewed and funding was requested for 15 candidates, 4 of which are BCAR members.

- b.** Tactic: Apply for NAR and/or NC REALTORS® Real Property Rights Fund funding for utilization in independent expenditure campaigns for pro-REALTOR® candidates.

SUMMARY OF OBJECTIVE B – Tactic b
In 2021 BCAR did initiate Independent Expenditure Campaigns through the Real Property Rights Fund for REALTOR candidates.

- c.** Tactic: Continue to plan and execute an annual legislative/media function to share legislative goals, provide a "state of real estate", and share information about real property ownership and the role it plays in the local economy.

SUMMARY OF OBJECTIVE B – Tactic c
Due to the pandemic an in person event was not possible but information is being sent through a separate news bulletin to the members.

- d.** Tactic: Continue to hold a candidate forum for members and their guests to hear invited candidates share their positions on issues of importance to the real estate industry including economic development.

SUMMARY OF OBJECTIVE B – Tactic d
Candidate forums are not possible for municipal elections in our area – 115 candidates.

- e.** Tactic: Influence political outcomes at the city and county related to the ownership, use or transfer of real property, taxation, land use, water policy, insurance issues, etc. through continuous fostering of relationships with local elected officials; when possible, monetize the positive outcomes and consistently remind members of the importance of BCAR to their businesses and financial bottom line.

SUMMARY OF OBJECTIVE B – Tactic e
BCAR's partnership with BASE and Tyler Newman as our Governmental Affairs Director has proved pivotal, year after year, in accomplishing this tactic.

2021 Accomplishments:

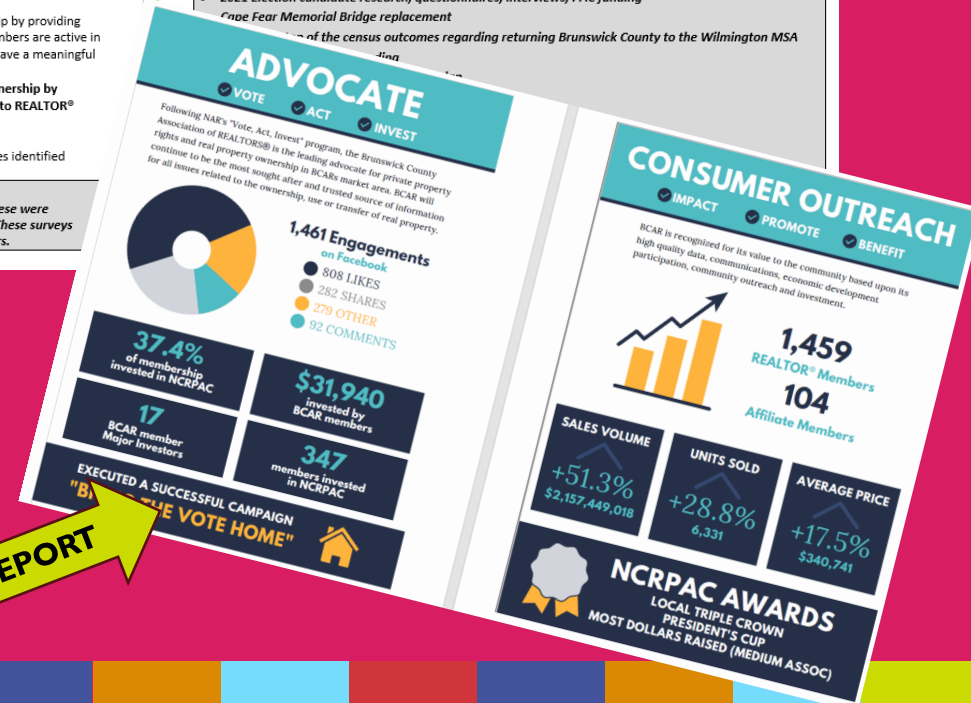
- Collaborated with Cape Fear Home Builders to create a webinar with experts on Risk Rating 2.0
- 2021 Election candidate research, questionnaires, interviews, PAC funding
- Cape Fear Memorial Bridge replacement
- Review of the census outcomes regarding returning Brunswick County to the Wilmington MSA

Other Accomplishments

- BCAR Services Corp Successfully negotiated with the IRS to allow BCAR to file as a non-profit by creating a 501c6 Corporation. Working with a Non Profit tax attorney and BCAR council, BCAR Services Corp was established. New budget, new set of books, new bank accounts established.
- Renovation of New Space and move from Red Apple
- Spring website www.MoveTo5FHC.com
- NotesRouter member communication software
- Member Value Proposition 2021 - \$21 in 2021 mandatory updates
- BCAR Academy established
- Diversity Initiative adopted and Diversity Statement adopted
- Sentrilock lockbox conversion and Supra lockbox return
- NAR Diversity Grant
- NCR Innovation Grant

YOUR REVIEW

ANNUAL REPORT



Core Standards

- Organization
- Time Management
- Phone a Friend
- Crying, Yelling, Swearing – Encouraged
 - First time is the worst
- Start with the easy stuff
- YOU ARE PROBABLY ALREADY DOING ALL OF THIS AND MORE

ORGANIZATION!!!!



<https://www.nar.realtor/ae/manage-your-association/core-standards-for-state-and-local-associations/core-standards-resources-criteria>



<https://realtorparty.realtor/resourceguide/core-standards>

These resources are in five categories:

Community Outreach

RPAC Fundraising

Campaign Services

Member & Consumer Involvement

Online/Other Resources

Recruiting, Elections Leadership Training

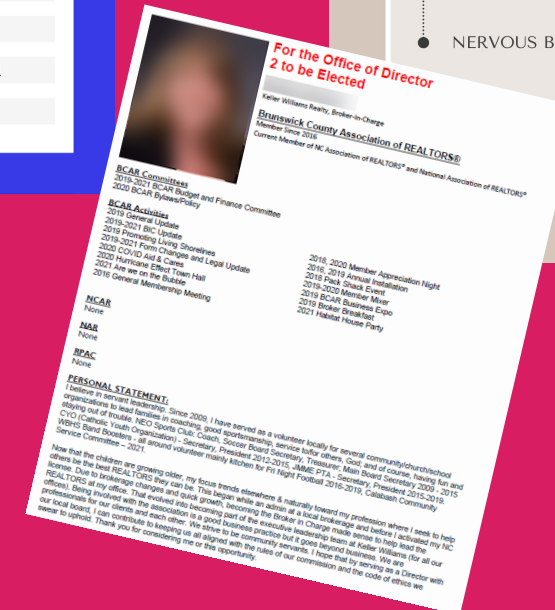
- Who Recruits?
 - Nominating Committee
- Elections
 - Bylaws/Policy
 - Election Committee
 - Forms
 - Voting
- START EARLIER THAN YOU THINK
- Leadership Training
 - Facilitator
 - Schedule early
 - Full Day
 - Team Building
 - Harassment/Confidentiality/Conflict of Interest/Anti Trust
 - Association/Bylaws/Policy – YOU
 - <https://www.nar.realtor/ae/manage-your-association/board-of-directors-orientation-toolkit>
 - REAL – REALTORS Excelling in Association Leadership

Leadership Orientation Manual

- ✓ Articles of Incorporation
- ✓ Bylaws
- ✓ Policy
- ✓ MLS Rules & Regs
- ✓ Strat Plan
- ✓ Budget
- ✓ Calendar
- ✓ Committee Rosters
- ✓ Duties
- ✓ Parliamentary Procedure
- ✓ Membership Marks Manual
- ✓ Regional Map

NOMINATIONS/ELECTION

- 4 MONTHS BEFORE ELECTION (BYLAWS 2 MONTHS)
CALL FOR NOMINATIONS
- 2 MONTHS BEFORE ELECTION
DEADLINE FOR APPLICATIONS
- NEXT AVAILABLE BOD
BOD APPROVES SLATE
- 1 MONTH BEFORE ELECTION (BYLAWS 3 WEEKS)
BIOS POSTED
- ELECTION
- NERVOUS BREAKDOWN





Calendars

IT'S BECOMING CLEARER,
ISN'T IT?



CAUTION:
Dates on calendar are
CLOSER than they appear.





Cool Down



Tools

Links

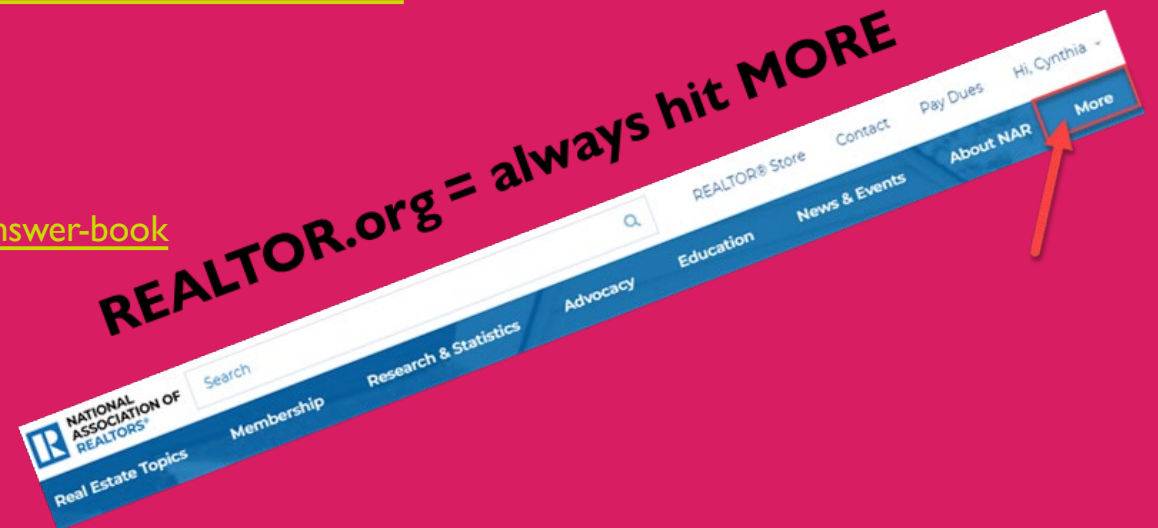
How NOT to Recreate the Wheel

Supplies



Tools & Links

- <https://www.nar.realtor/association-executives>
- NAR AE Orientation
 - <https://www.nar.realtor/ae/manage-your-association/resources-for-new-aes>
- NAR Organization Assessment Checklist
 - Strengths & Weaknesses – New Opportunities
 - <https://www.nar.realtor/ae/manage-your-association/organization-assessment-checklist>
- RARE = REALTOR Association Resource Exchange
 - <https://www.nar.realtor/rare.nsf>
 - Get your samples here!!!!
- The Answer Book
 - <https://www.nar.realtor/ae/professional-development/the-answer-book>
- NAR Acronyms
 - <https://www.nar.realtor/about-nar/nar-acronyms>
- Phone a Friend
 - <https://www.nar.realtor/ae/ae-mentor-program>
- NAR Website
 - Crying, Yelling, Swearing – Encouraged
- Google – GTS (Google That Sh&t) LOOK AT WHAT OTHERS ARE DOING!





Tools & Links

- Newsletters
 - State Newsletters
 - Commission Newsletters
- Facebook
 - AEI Year-Round
 - State FB Group
 - NAR
 - MLS Directors & Staff
- M1 (NRDS)
- www.ASAECenter.org
- Nonprofit Association info
 - <https://www.councilofnonprofits.org/>
 - <https://www.snpo.org/>
 - <https://www.ncnonprofits.org/>



Tools & Links

Checklist for New AEs

- <https://www.nar.realtor/ae/manage-your-association/resources-for-new-aes/checklist-for-new-aes-chronological>
- Week 1 – 7-12 Months on the Job

New AE Video Series

- <https://www.nar.realtor/videos/new-ae-webinar-video-series>

How to Create a Table of Contents in Word

- <https://support.microsoft.com/en-us/office/insert-a-table-of-contents-882e8564-0edb-435e-84b5-1d8552ccf0c0>

Big Ass Calendar

- Lushleaf Designs Large Wall Calendar – 48” x 74” Dry Erase Reusable
- <https://a.co/d/1h8jcoy>

Stretching



Course & Education

Advice & Tips

Supplies





Education

- RAM – REALTOR Association Management Self Study Course (FREE)
- ARAM – Advanced REALTOR Association Management Self Study Course (\$150)
- Professional Standards Administrator (FREE)
- Advanced Concepts Self Study on Professional Standards (\$75)
- New Member COE (FREE)
- REAL – REALTORS Excelling Association Leadership Self Study Course (FREE)
- Fair Housing Self-Study Module (FREE)
- Diversity, Equity & Inclusion Self Study Module (FREE)
- ePro
- Fairhaven (FREE)
- AHWD
- C2EX (FREE)
- RCE (\$\$ + TEARS, LATE NIGHTS & WINE)
- CAE (\$\$ + BLOOD, SWEAT, TEARS & WHISKEY)



Conferences, Meetings & Your Calendar

- Office Closures
- State Governance Meetings
- NAR Mid Year
- NAR Annual
- AEI
- AE Regional
- Leadership Summit
- YOUR Committee Meetings
- NMO



NAR AE Orientation



Tips

- Part Time Therapist
- Trust
- Connect
- Humility
- Conflict
- Every day is different – yet every year is the same
- What's the worst that going to happen AND DO NOT let fear stop you



Tips

- Agenda – Make or Break a Meeting
- Member Benefits
- Non Member Proof Read
- Sacred Cows
- E&O Insurance fun facts
- PR & Press Releases

llll **AE** *llll*

SWEAR WORDS

COE CYCLE

core standards

Strategic Planning

DRINK TICKETS

BYLAWS CHANGE

MONTH END

Installation Banquet

ORIENTATAION

Expense Reports

ANNUAL DUES
BILLING

NAR CONFERENCE
REGISTRATION

audit

**RPAC
GOALS**

elections

YEAR END

GRANT
APPLICATIONS

MLS RULES

agenda

EVERYTHING IS FINE



Thank you

Cynthia Walsh

910.547.1338
my cell – call or text

Cynthia@bcarnc.com

