

Women's Council of REALTORS™

State Leadership Academy

August 4-6, 2017

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Women's Council of REALTORS™



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Women's Council of REALTORS™

Faculty



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Women's Council of REALTORS®

Ground Rules


- Be on time
- Be prepared with your information
- Participate
- Respect others opinions
- Share ideas
- Ideas are valued and discussed
- One speaker at a time
- Turn off your cell phones and no texting-be present!

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Academy Overview


- Logistics
- Sessions
- Breaks
- What are your goals?



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Icebreaker & Introductions



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Women's Council of REALTORS[®]

WITHOUT
SPEAKING
ALLOUD
A
NOT A SINGLE
WORD

Women's Council of REALTORS[®]

FORM
A
SINGLE
LINE
BY
YOUR
STATE
SIZE

Women's Council of REALTORS[®]

States by Size Large to Small

1	23
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Women's Council of REALTORSSM

Turn to your Right
& Introduce yourself

Turn to your Left
& Introduce yourself

Women's Council of REALTORSSM

Module 1

Overview of The Council

Women's Council of REALTORSSM

Governance Structure

Role	Member Type	Selection Process	Term
President	REALTOR SM Member	Elected as President-elect, automatically moves up	One-year term
President-elect	REALTOR SM Member	Elected by membership	One-year term
Secretary	REALTOR SM Member	Appointed by incoming President-elect (ratified at last Governing Board prior to year taking office)	One-year term
Treasurer	REALTOR SM or National Affiliate Member	Elected by the membership	One-year term
Program Dir.	REALTOR SM Member	Appointed by incoming President (ratified at last Governing Board Meeting prior to year taking office)	
Membership Dir.	REALTOR SM or National Affiliate Member	Appointed by incoming President (ratified at last Governing Board Meeting prior to year taking office)	

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Project Teams

Project Teams

- Used for a defined period of time
- Disband at end of project
- Members and outside support as needed
- Ratified by Governing Board
- Examples:

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Membership Life Cycle

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Industry Events & Networking Events

Minimum Six (6) per/year

Industry Events	Networking/Relationship Building Programs
<ul style="list-style-type: none"> • Minimum of 4/year; 1/quarter <ul style="list-style-type: none"> • Timely • Issue / Relevant • Professional Development • Member income-generating • 1 out of 4 MUST focus on development of business leadership skills • 1 out of 4 MUST collaborate with: <ul style="list-style-type: none"> • Other local Networks • Local REALTOR® Association • Related real estate organizations 	<ul style="list-style-type: none"> • Minimum two (2) additional <ul style="list-style-type: none"> • Member only • Mastermind groups • Lunch and learn • Roundtables • Networking events • Social event • Relationship building

Quality over Quantity!

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Consistency In Terminology

- **'Industry Events'**: use to describe the required four events each year that engage other organizations and invite a wide range of industry professionals, and others as appropriate. These events are fed to the national Women's Council website for exposure.
- **'Networking/Other Events'**: use to describe smaller member-focused network and relationship building events, or other types of events the network conducts, including social events, fundraisers, community service events, etc.
- **'Meetings'**: use to describe network business meetings such as governing board meetings, annual membership meetings, elections, etc. where the business of the network is conducted
- NO LONGER USE THE TERM 'Program'
- AVOID USE of the term 'Chair' or 'Vice-chair' as it relates to Project Teams; use "Team Leader" or "Co-Team Leader"

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Industry Events: Strategic Collaboration

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- Networks **NOT** Chapters
- Use Official Corporate Logo

- Official Corporate Logo for your Local Network

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Break

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Your Role In The New Model

Paving the Road & Driving On It At The Same Time



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EDUCATORS, COMMUNICATORS & ORIENTATION

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Educators

- Provide education to local network leaders, reinforcing the principles and practices delivered at Leadership Academy.
- Model effective network operations in how the state is run and in the actions, behaviors and messages of its leaders.



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Educators


- Facilitate sharing of ideas and solutions to issues and challenges faced by networks.
- Use tools developed by national (e.g., leadership criteria, systems, checklists, etc.), consult with local networks on leadership development processes and strategies.

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Communicators

- The state network should routinely communicate key messages supporting the mission, vision, values and goals of Women's Council.
- Develop a strong communication plan of action.
 - Incorporate key dates and deadlines in plan.
 - Calendar your plan.



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Women's Council of REALTORSSM **Communicators**

Share key training opportunities provided by national – webinars, newsletter, local PMN schedules etc.

- Assist chapters with administration of their wcr.org network websites to insure they consistently reflect the Women's Council brand.

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Women's Council of REALTORSSM **Orientations**

Deliver an orientation with a set curriculum and learning objectives.

- Ensure understanding of new network model operating standards.
- Review budgets and annual business plans.
- Allow for networking and idea sharing.

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Women's Council of REALTORSSM **Orientations**

- Who We Are
- Chapter Leadership
- Leadership Team
- Getting Members Involved
- Online Tools & Resources
- Business Plan & Annual Report
- Demo Tools & New Concepts
- Conflict Resolution




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Women's Council of REALTORS® PowerPoint For Network Leaders

Women's Council of REALTORS®
The Women's Council of REALTORS® and You!

Get to know your Women's Council and where it can take you!

WCR.org - Network Tools – Marketing & Communications – Communicating Council Value



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Partners with Complimentary Roles



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State and Local Leaders....

- considers the advancement of others a responsibility and a priority.
- plans for the future – both long-term and short-term.
- can articulate an exciting vision and direction for the group that motivates others to get involved.
- models how others can get value through involvement and contribution.
- understands and taps into the strengths of her team.
- is open-minded and listens to the ideas and perspectives of others.
- ensures a smooth transition between leaders.
- is a good follower as well as a good leader.

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The Affiliation Agreement



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Affiliation Agreement

What is an Affiliation Agreement?

- Document designed to help better understand the operational relationship between Council and Networks, and establish and easy to understand framework.

Why Now?

- Chapter-to-Network transition opens the opportunity for the Council to further refine and improve it's operational procedures.

Benefit to Local Networks?

- Guidelines in one document that can be used throughout the year to help Networks be successful.

When Will Networks Be Signing Affiliation Agreement?

- Agreements will be sent out for signature in mid-December.

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Compliance & Monitoring



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Transition Planner

- Using this as a tool to help networks meet minimum operating standards.
- Monitor key timelines using the Transition Checklist (Handout)

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Compliance

Member Programs & Services – 6 per year

- 4 Professional Development (1 Collaborative)
- 2 Networking/Relationship Development

Membership Structure

- No fewer than 20 members. (New – 30)
- No more “local affiliate” all strategic partners
- No more than 20% national affiliates

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Compliance

New Governance Structure -2018

- 6 governing board voting members
- Project teams
- Reporting Requirements

Branding & Communication

- Logo Use
- Website – Event Posting
- Event Promotion

Member Development

- New Member Communication Plan

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Certified Training Teams



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To request a trainer and begin the process, fill out an officer request form.
Wcr.org – network tools – officer invitation.

Special notes ! Put in "C2N TRAINER" under the fields titled "invited officer" and "topic". Also, under the question "will invited officer be installing upcoming officers" just fill in "no".

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Activity: Detours & Hazards




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Think About...

Summarize 1st Module

Q&A



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BLINK

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Module 2

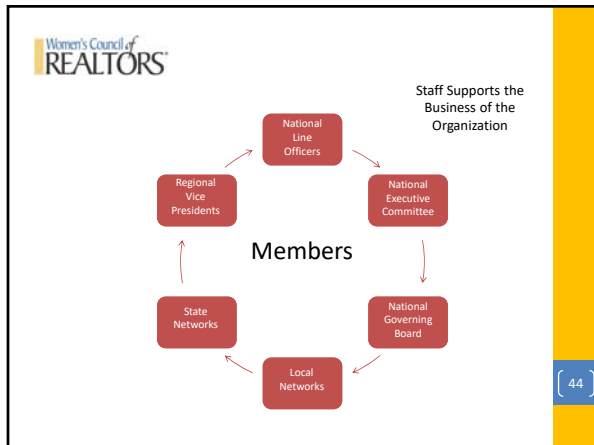
The Big Picture

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Role of State, RVP, Governor

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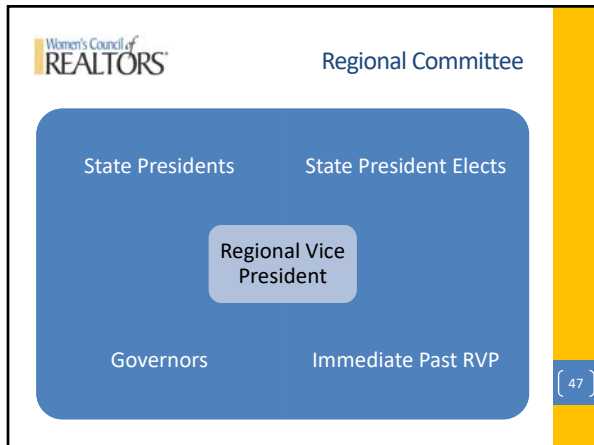


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Serving National Governing Board & Regional Committees

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Role of the Committee

Identification

- Scout talent among the members and encourage members with potential to apply for a volunteer position or role
- Pull members from the Volunteer Town Square database (see below) who have expressed interest in state level roles and vet them for consideration by the State Leadership Team

Communication

- Promote the Volunteer Town Square and the value of getting involved

Development (the Committee's *primary role*)

- Identify and guide applicants in achieving their development goals (note: provide LID committee with a variety of suggestions on how this can be done)
- As needed, develop a program/event educating members on how to get involved in and outside of the Council
- Develop a strategy to provide 'feedback' on volunteer performance and coaching on the next steps of development (future role/function of the LID Committee)

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Committee Composition (at a minimum)

5 members +

2 Active Past State Officers

3 members*

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Criteria needed to serve

- Have attended Women's Council at the local or state level
- Have attended a state or national industry conference
- Have served/serve as a director on the local, state or national level
- Serve in a leadership/management role at their organization
- Have completed a local/state or national leadership academy
- Past local membership director

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Remember:

- Appointed by the State Leadership Team
- Can be scaled up based on State size
- Institute Term Limits
- More Info Coming in 2018

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Council Branding & Key Messages

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Guidelines for Branding

- Consistent brand across all Networks – **no alterations, no themes**
- One mission; one brand

CORRECT

INCORRECT

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Women's Council of REALTORS® Guidelines for Branding

- Network name: Describes *what* we are
 - Women's Council of REALTORS® Texas
 - Women's Council of REALTORS® Highland Lakes

DO NOT SAY:

- Women's Council of REALTORS®, Highland Lakes Network
- Highland Lakes network of the Women's Council of REALTORS®
- Highland Lakes Local Network, Women's Council of REALTORS®
- Highland Lakes Chapter Network, Women's Council of REALTORS®

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Women's Council of REALTORS® Network Name Change Process

Networks filing Form 990 or 990-EZ report the change on your 2017 annual return.

Networks filing Form 990-N, the e-Postcard, report the change by letter or fax only (not by phone). Information is all online at

- <https://www.irs.gov/charities-non-profits/charitable-organizations/change-of-name-exempt-organizations>

The particular supporting documentation required to report a change of name depends on your incorporation status.

If Your Network Is	The Request Must Include
Incorporated	A copy of the amendment to the Articles of Incorporation, and proof of filing with the appropriate state authority.
Unincorporated	A copy of the amended Bylaws showing the effective date of the change of name and signed by at least two officers.

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Women's Council of REALTORS® Facebook – Name Change Process

- Network name on Facebook:
 - Women's Council of REALTORS – California
 - Women's Council of REALTORS – Phoenix
 - Women's Council of REALTORS – Northern Utah

Step 1: Change my name

Step 2: To change your name on Facebook:

1. Review our name standards
2. Click = in the top right of Facebook and select Settings
3. Click Name
4. Enter your name and click Review Change
5. Enter your password and click Save Changes

If you're having trouble changing your name, please let us know. Keep in mind, you can only change your name every 60 days.

View in Help Center

Was this information helpful?

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Facebook – Name Change Process

1. Go to Network Facebook Page
2. Click the "ABOUT" section on left
3. Request the name change (click edit)
 - Such as: Women's Council of Realtors Illinois
 - NOTE: Facebook will not allow for all capitals or *

The screenshot shows the Facebook page for 'Women's Council of Realtors Illinois'. The 'About' section is visible, showing fields for 'Category' (Nonprofit Organization), 'Name' (Women's Council of Realtors Illinois), and 'Username' (@IllinoisWCR). A '58' icon is in the bottom right corner of the screenshot.

Key Messages

- What?
- Who?
- When?
- Why?
- Where?

2017 Women's Council Key Messages

Impact of Women

- The presence of women is essential to the public development process in the industry and in the community.
- Needed Content Block:**
 - A woman's voice at the table is essential to a well-rounded decision-making.
 - Encouraging leadership skills in women by means of the requests and our educational efforts, and in ensuring we meet the needs of those we serve.
- Women's Council provides national to regional influential leadership roles in business, in the community and in organized real estate.

Global Value

- Women's Council is the industry's premier source for advice, information, and financial services, educational and community leaders.
- Needed Content Block:**
 - Encouraging women to be the industry's premier source for advice, information, and financial services, educational and community leaders.
 - The real estate industry's role in our world must be addressed for all stakeholders.
 - Women's Council's role in the industry and community is to be a relevant resource for REALTORS® in a changing industry.
 - Encouraging leadership skills in women by means of the requests and our educational efforts, and in ensuring we meet the needs of those we serve.
 - Women's Council's leadership and volunteer opportunities are created as best practice in the industry.
- Membership in Women's Council is a sign of professionalism and helps you build your professional credibility.
- Needed Content Block:**
 - Women's Council members share a set of values in how they run their businesses: integrity, transparency and a commitment to excellence and continued development through innovation.
- Women's Council members, assist others their superior and experience, and support each others' development as professionals.
- Needed Content Block:**
 - The role of the Women's Council member network sets the Council apart from other real estate organizations.
- When a member shares her unique experiences, skills and perspectives, she enriches the entire Women's Council network.
 - Needed Content Block:**
 - Encouraging leadership skills in women by means of the requests and our educational efforts, and in ensuring we meet the needs of those we serve.
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 - Encouraging leadership skills in women by means of the requests and our educational efforts, and in ensuring we meet the needs of those we serve.

A '59' icon is in the bottom right corner of the screenshot.

Activity

Components of your 1 minute commercial


1. Opening
2. Who Are You?
3. What we Provide?
4. What's in it for them?
5. Closing

A '60' icon is in the bottom right corner of the screenshot.

Women's Council of REALTORS® Think About...

The Big Picture

1. How will you communicate the information?
2. Who on your team needs this information?
3. How will it be helpful to them and the Network?



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Module 3

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BLINK OFF

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Reporting requirements...the Women's Council tools for tracking your success...

- Local
 - Quarterly Report
 - Email Link From National Using Jot Form to Local President
 - Sent back to NATIONAL automatically when submitted
 - National emails an Excel to State with data
 - This can be used to monitor programs & submit for recognition
- State
 - Quarterly Report
 - Email Link From National Using Jot Form to State President
 - Sent back to NATIONAL automatically when submitted
 - National emails an Excel to National Line Officers with data

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Reporting requirements...the Women's Council tools for tracking your success...

- Program Recognition
 - Submissions
 - Programs held 1/1/2018 – 6/30/2018 must be submitted on or before 7/31/2018
 - Programs held 7/1/2018 – 12/31/2018 must be submitted on or before 1/31/2019
- State Network Category
 - Super Mega State (25 or more networks) – up to 10 programs 2x/yr
 - Mega State (11-24 networks) – up to 7 programs 2x/yr
 - Large State (5-10 networks) – up to 5 programs 2x/yr
 - Small State (1-4 networks) – up to 3 programs 2x/yr
- State Review Process
 - Committee

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Tools Local Networks Need

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Transition Planner – Keep one for each Network to monitor progress of each Network

Network Operating Model on wcr.org
Got to Network Tools, Network Operating Model



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Governmental Reporting

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Insurance

- Defense & Indemnification of Officers and Directors
 - Covered under NAR Professional Liability Insurance Policy
 - Policy has a deductible for local networks of \$3,000, state networks of \$6,000 and for national of \$20,000.
 - This is NOT a liability, theft or bodily injury policy!
- General Liability Insurance
 - Sometimes required when holding an event on public or private property
 - Networks must arrange for coverage-this is not available through National WCRI
 - Limit liability when serving alcohol
- Fidelity Insurance
 - Generally indemnifies the insured against loss incurred due to dishonesty (ex. Embezzlement of Network funds)
 - How do you find it?

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Women's Council of REALTORSSM The Tax Rules and Reports

- Taxes
 - Need to File State & Federal
 - Every Network MUST file!
 - Need help? Hire a professional!
- 501c6
 - We are not-for profit
 - We are NOT tax exempt
- FEIN
 - Federal Employer Identification Number
 - How do you find it?

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State Standards, Bylaws & Budgets

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Women's Council of REALTORSSM State Chapter Standards

- Maintain at Least 50 Active REALTOR[®] Members
- Maintain at Least 2 Local Chapters
- Report 2018 Officers to National no later than November 1, 2017

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STANDING RULES

Clarifies Sections of the Bylaws

- Meetings
- Elections
- Treasury
- Installation of Officers
- Duties
- Membership
- Expense Reimbursement
- Honorariums

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Women's Council of REALTORSSM Standing Committees

- Bylaws
- Education & Programs
- Finance and Budget
- Leadership Identification & Development
- Nominating
- Strategic Planning**
- International**
- Marketing**
- Ways & Means**

** COMMITTEES AT THE OPTION OF THE NETWORK

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Budget

Income

- Dues (\$ x # of members)
- Annual Strategic Partners
- Education/Programs
- Networking Events
- Interest on Accounts
- Advertising

Expenses

- Meeting Costs
- Speakers
- Officer Travel
- Scholarships
- Committee Expenses
- Cost of Events

The Budget should be "Zero Based" with any money left over going into a Reserve Account at the end of the year

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BUDGETING ACTIVITY

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Plan & Deliver State Orientation

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Women's Council of REALTORS™ Creating A Leadership Orientation

BRINGING THE TEAM TOGETHER!!

- Past Leadership
- Your Regional Vice President
- Your Governor(or Dist Vice Presidents)
- Your Team/Board
- National Staff & Faculty
- WCR.org
- AAA – Certified Network Model Trainers

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Women's Council of REALTORS™ Schedule Your Course Today!

4 Easy Steps

OFFERING A PMN COURSE IS EASIER THAN EVER

THE TIME IS NOW TO OFFER A PMN COURSE

1. Visit wcr.org/our-designation/
 2. Complete the Course Provider Licensing Agreement and select your Delivery Option*
 3. Select your instructor, course and location
 4. Start marketing the course in your area!


National will help guide you through the process.

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Women's Council of REALTORS™ Think About...

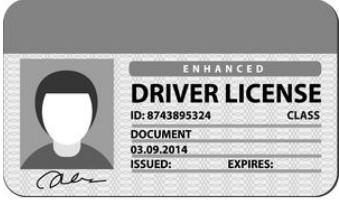
Summarize Module 3

Q & A



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Congratulations!
You have Graduated!
Have A Fabulous 2017
and Remember . . . *We Are Here For You!!!*

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