



NATIONAL
ASSOCIATION *of*
REALTORS®

Commercial Innovation Grant Executive Summary

Innovation Name: Commercial Outreach and Recruitment

Association Name: Texas Association of REALTORS®

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I. Project Summary (purpose and concept)

Introduction:

The Texas Commercial Roadshow began in 2010 as a member-driven, strategic communication program. The Texas Association of REALTOR® (TAR) Commercial Staff along with member volunteers traveled to local associations to visit with organized commercial groups to engage and encourage existing members to participate at a higher level by educating their members about the benefits of being a REALTOR®.

a. Statement of purpose

The Texas Outreach and Recruitment program is an expansion of the Texas Commercial Roadshow program. The Texas Outreach and Recruitment program focuses not only on enhancing value to Commercial members through high-quality education (MCE) offerings, updates on new and expanded Commercial services and offerings, and networking opportunities, but it also focuses on recruitment of major players in commercial real estate who are not yet members of the association.

Concept:

The Texas Outreach and Recruitment program hosts an event in the major markets in the state and partners with commercial affiliate organizations, such as CCIM. The program focuses on delivering the message to Non-REALTOR® commercial practitioners about the value offered by the association in the form of



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political advocacy, legislative policy, commercial forms, educational opportunities, networking, and forums. The program also emphasizes the importance of the power association membership has in speaking as one voice on behalf of private property rights.

b. Objectives

The primary objective of the Texas Outreach and Recruitment program is to increase engagement by Commercial members and introduce non- REALTOR® members to the many benefits available. Additionally, the program seeks to highlight the expertise of Texas REALTORS® by showcasing the value of association membership as well as showing that Texas REALTORS® are actively engaged and have expertise beyond that of a non-REALTOR® member. As a result, this will reduce the burden on all members by providing a larger pool of individuals investing in the PAC and serving on committees, increasing their ability to work with specialists who exhibit a higher level of professionalism through Code of Ethics adherence.

2. Project Financials

2013 Innovation Grant Budget	
Airfare	\$2,191.00
Meals	\$1,114.83
Car Rental, Mileage, Gas, Parking	\$631.06
Hotel	\$552.11
MCE Approval, Printing & Shipping of Materials	\$700.00
TOTAL	\$5,189.00

3. Performance Measures & Benchmarks

- a. Outline task, meetings and activities required to close the project
 - TAR Commercial Staff met with AEs of local associations ahead of time either by conference call or in person to set the agenda for each event.



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- TAR Commercial Staff worked with the TAR Governmental Affairs Department and TREPAC staff to coordinate education offerings and presentations.
- Where possible, TAR staff met with local association members to assess needs and “wishlists.”
- Following each event, TAR Commercial Staff asked for input on each event by both Commercial members and non-REALTOR® members.

b. To what level of success was achieved?

Volunteer numbers for TAR Commercial Committee continued strong, with more members volunteering than open seats were available. For many non-REALTOR® members, the program was their first exposure to information on the benefits available through association membership.

4. Project Timeline (how long did it take)

Event	Date	Attended By
South Texas Commercial Association of Realtors® (STCAR) Broker Breakfast & Property Exchange, 8:00-9:30am	6/28/2013	Mike Barnett, Daniel Gonzalez, and Chris Rosprim
Central Texas CCIM Monthly Luncheon, 1:15-3:15pm	9/4/2013	Mike Barnett, Daniel Gonzalez, Harry, Gibbs, Amy Gamber, and Steven Garza
Greater El Paso Association of REALTORS® Commercial Breakfast Meeting, 8:30-11:30am	9/19/2013	Mike Barnett, Daniel Gonzalez, Kinski Moss, and Steven Garza

5. Project Management

a. Marketing Strategy

The initial strategy was to secure invitations to 3 commercial groups in 2013 to include major markets such as San Antonio, Austin, and El Paso. The marketing strategy for each visit was determining participation goals and outlining specific



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methods to achieve those goals. This was done collaboratively through project meetings with input from all team members.

The Commercial Recruitment and Outreach team consisted of:

- Mike Barnett, Vice President/Chief Operating Officer
- Daniel Gonzalez, Director of Legislative Affairs
- Amy Gamber, Administrative Assistant Operations/Legal Affairs
- Kinski Moss, Senior Associate Counsel and Staff Liaison to TAR Commercial
- Steven Garza, TREPAC Education Coordinator
- Harry Gibbs, TREPAC Trustee to TAR Commercial and Liaison to TAR Commercial
- Chris Rosprim, TAR Commercial Committee Chairman

b. **Planning Meetings**

Planning meetings were scheduled regularly leading up to each event and following the completion of each visit to assess performance. Topics discussed and deliberated included participation goals, methods to achieve those goals, collateral needed to attain goals, budget, and critical analysis post-visit.

c. **Day-to-Day Project Management**

Planning event travel logistics
Developing presentation materials
Developing educational (MCE) course
Drafting talking points
Performing Post-event assessments

6. **Lessons Learned/Outcomes**

a. **Who Benefitted From Your Project?**

Commercial members and non-REALTOR® members. Commercial members were reminded of resources and benefits already available to them and learned how to utilize such resources. Non-REALTOR® members learned the value and benefits of association membership as well as the different types of membership.

b. **Project Highlights**

MCE credit through education on state legislative issues. Talking Points and Benefits flyers (see attachments) will be useful materials throughout year at other



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events. Outreach to other organizations was viewed and appreciated as a goodwill gesture by TAR.

- c. **Project Best Practices**
Meet with key volunteers prior to event to focus on top objectives for each event. Provide tools and talking points for the Commercial Recruitment and Outreach Team.
- d. **What processes worked well**
Commercial members were armed with talking points and information on important legislative developments. Cooperation with the TAR Governmental Affairs Department allowed the Commercial Outreach and Recruitment program to provide members and non-REALTOR® members with MCE credit for participating in a Legislative Update Session. Presentations and printed materials (see attachments) provided information on the many ways TAR benefits Commercial REALTORS®.
- e. **What could have been improved, and how?**
Disseminate and publish more information on each event to increase participation.
- f. **Advice/Comments for Implementing in Another Association**
Meet with AEs from the local associations as well as volunteers to determine the objectives for each event as well as the needs of Commercial members and non-REALTOR® members to ensure that each event is valuable to all that attend.

7. Supporting Documents

Commercial Membership Types and Benefits Flyer
Commercial Benefits Brochure
2013 Legislative Report
TREPAC Brochure

In case of questions, contact: Melanie Sligh msligh@realtors.org or 312-329-8282

**In commercial
real estate?
Look what we've
got for you!**

As a commercial broker, you may wonder what benefits you receive from your membership in the Texas Association of REALTORS®. Every member—regardless of your specialty—benefits from the strength and economies of scale enjoyed by the largest association in Texas. The grassroots involvement of more than 80,000 members gives the Texas Association of REALTORS® the political influence to pass laws favorable to the commercial sector. You'll also find value in your association's commercial real estate programs and networking opportunities. And you will save money with benefits negotiated on behalf of all REALTORS® in the state.



As a Texas REALTOR® specializing in commercial real estate, your membership at the state and national levels is worth more than your total dues paid! How much more is entirely up to you. So get involved and take advantage of all your REALTOR® membership has to offer.

Unparalleled political advocacy

The Texas Association of REALTORS® offers members a thorough and organized approach to political advocacy.

Through grassroots campaigns, the power of TREPAC, and the strategy of the Governmental Affairs Department, we regularly defeat proposals at the state Capitol, like mandatory sales-price disclosure and transfer fees on all real estate transactions (and, yes, that could include commercial leases).

We also fight for a balanced, fair, and transparent property-appraisal system and oppose any tax structure that places an undue burden on commercial property.

With the Issues Mobilization Fund, we've got your back at the local level, too. Created in 2000, this fund helps Texas REALTORS® pass or defeat real estate-related proposals at the local level ... things that really affect your business, like zoning restrictions, short-term rentals, anti-growth ordinances, rental registrations, and any other issues.

What other issues, you ask? Hey ... you tell us. That's how Issues Mobilization works: A group of local Texas REALTORS® identifies a proposed threat and reports it.

Then the Issues Mobilization Committee steps in, usually within 48 hours, and brings some combination of political expertise, strategic guidance, marketing collateral, and funding. Then we fight it there ... before it gets too big.

As a commercial broker, you have to admit the idea of restrictive ordinances, new taxes, and increased regulation is pretty scary. What's even scarier is how

these proposals could affect your business.

But, don't worry. We'll take care of the legislative and regulatory stuff ... you take care of your business.

Commercial forms and information

You have at your disposal a library of 37 commercial real estate forms available to members only. You can access them in the *Forms* section of TexasRealtors.com and through zipForm, the industry-leading forms and contracts software that's free for all Texas REALTORS®.

Legal

When you want to talk with an attorney about real estate law and related matters, the Legal Hotline is available Monday through Friday, 8:30 a.m. - 4:30 p.m., for free, by calling 512-480-8200.

And you can stay informed on legal and political issues, industry trends, and more with *Texas REALTOR®* magazine and the association's e-newsletter, podcasts, videos, blog, and social-media activity.

Networking

TAR Commercial brings together the state's foremost economic and business experts to give you insights on trends and factors affecting your livelihood. We also provide networking events, "haves and wants" marketing sessions, and other special events during the association's Winter Meeting and the annual Texas REALTORS® Conference. Making connections at these events can lead to lucrative new business opportunities.

Recognition

The William C. Jennings Award for the Texas Association of REALTORS® Commercial Transaction of the Year is awarded annually to recognize outstanding efforts in commercial brokerage. To enter or read about previous winners, check out *Texas REALTOR®* magazine or the *Commercial* section of TexasRealtors.com.

Education

Your continued professional development as a commercial broker ensures that you increase your knowledge and your clients get better service. That's why the Texas Association of REALTORS® plans workshops and webinars, MCE sessions, and programming with you in mind.

Professional standards

Sure, commercial transactions are different. But the processes for handling disputes or complaints are the same. There's only one REALTOR® Code of Ethics. What's sometimes missing, though, is a commercial real estate expert to help solve commercial-transaction disputes. That's you! As an expert negotiator, you have a lot to offer your fellow Texas REALTORS® and consumers.

Money savings

Commercial members can take advantage of all of the money-saving programs available to Texas REALTORS®. These include discount lodging, car rentals, office products, and many more. For additional information, visit TexasRealtors.com/Benefits.

Superior value for the commercial practitioner

In addition to the benefits at the local level, the National Association of REALTORS® has a robust program for commercial members through NAR Commercial. Check out your national benefits at Realtor.org/Commercial.



Invest in your business, invest in TREPAC



The real estate industry must remain strong politically. Your TREPAC dollars support candidates and elected officials who understand the importance of a strong real estate sector.

Thank you for your investment.

Get instant updates from TREPAC



Text TREPAC to 21824



Follow @TexasTREPAC on Twitter



Like Facebook.com/TREPAC

Calculate your savings

Transfer tax

A tax on the transfer of real property would discourage homeownership in Texas. According to a leading economist, that translates into a 7% reduction in sales volume.

Sales volume value **\$1,000,000** X 0.07 X 3% = **\$2,100**
Your savings

Tax on services

We defeated another proposal to extend the state sales tax to professional services. Had it passed, your commissions would've been taxed at 8.25%.

Gross commission value **\$30,000** X 0.0825 = **\$2,475**
Your savings

Mixed-use vehicle tax

Some county tax assessor-collectors were targeting Texas REALTORS' for an ad-valorem (property) tax on personal vehicles. This new tax could've spread statewide to all Texas REALTORS' and other independent contractors.

Vehicle value **\$27,000** X 0.0275 = **\$742.50**
Your savings

Professional fees

We opposed a legislative proposal to double the \$400 fee that real estate brokers pay for their two-year license in Texas.

Your savings **\$400**

Add up your total annual savings

When you add it all up, TREPAC is an incredibly valuable pocketbook protector. By investing in TREPAC, you get to keep more of your hard-earned money.

Total savings **\$5,717.50**

More examples

Sales volume value	Transfer tax	Gross commission value	Tax on services	Vehicle value	Professional fees	Vehicle tax	Your annual savings
\$500,000	\$1,050	\$15,000	\$1,238	\$24,000	\$400	\$660	\$3,348
\$1,500,000	\$3,150	\$45,000	\$3,713	\$35,000	\$400	\$963	\$8,225
\$2,000,000	\$4,200	\$60,000	\$4,950	\$46,000	\$400	\$1,265	\$10,815
\$3,000,000	\$6,300	\$120,000	\$9,900	\$57,000	\$400	\$1,576	\$18,168

Don't wait till it's too late. Invest now.



You may think TREPAC's just another boring political action committee. **Of course, since elected officials are always voting on stuff that can make or break your business, aren't you glad we have a**

really powerful

boring political action committee?

Want to know how TREPAC has contributed to your success?

Look inside ...



Paid for by the Texas Association of REALTORS Political Action Committee, P.O. Box 2246, Austin, Texas 78768-2246

How TREPAC has helped you

The Texas Association of REALTORS® Political Action Committee (TREPAC) supports policies and politicians that support private-property rights and the real estate industry. Need proof? Take a look ...



1993	Seller disclosure Required a seller of residential property to use a promulgated property-condition disclosure form, thereby decreasing liability for real estate licensees	2005	Tax on personal autos Prevented a property tax from being imposed on personal vehicles also used in your business
1997	Homeowners equity Authored a constitutional amendment protecting a homeowner's equity by requiring an 80% loan-to-value ratio on refinances; preventing borrowers from becoming upside down on their home loan	2009	Real estate tax Defeated multiple proposals to tax real estate, including several bills requiring the creation of a tax on every deed recorded by the county clerk
1999	Licensing of mortgage brokers Established a much-needed consumer-protection statute requiring the mandatory licensing of mortgage brokers	2011	Eminent domain Enacted strong consumer protections in eminent-domain proceedings
2001	Sales tax Killed legislation that would have levied an 8% sales tax on the sale of all real property—commercial, residential, farm and ranch, industrial, raw land—all of it	2011	Transfer fees Passed a measure that eliminates most private transfer fees on real estate transactions
2003	Transfer tax Defeated a proposal which would have created a 1% real estate transfer tax on the sale or lease of all real property	2011	TREC Helped the Texas Real Estate Commission attain a self-directed, semi-independent status, insulating the agency from future state-mandated budget cuts and enabling TREC to better serve licensees and consumers
2005	Minimum services Codified regulations relating to a minimum level of service a real estate broker must provide to a consumer	2011	DTPA Passed a revision to the Deceptive Trade Practices Act that effectively exempts real estate brokerage from liability under the act—as long as the broker or agent hasn't committed an unscrupulous or illegal act

Public policy

Four areas of Governmental Affairs form a strong, well-balanced political advocacy unit.

TREPAC Support for real estate friendly officials	TREPAC backs local, state, and national candidates and elected officials who have a record of protecting private-property rights, preserving the dream of homeownership, and supporting the real estate industry.
Legislative Affairs A voice at the Capitol	Association staff and Texas REALTOR® volunteers craft the association's agenda for each session of the Texas Legislature. Then during the session, they read every bill and work with lawmakers to promote that agenda.
Political Affairs Programs Grassroots involvement	The large number of Texas REALTORS® and the association's well-orchestrated grassroots programs enable the Texas Association of REALTORS® to exert a powerful influence on behalf of private-property rights and the real estate industry. We offer myriad tools to keep you up-to-date on public policy that affects your business. <ul style="list-style-type: none"> • The Legislative Liaison e-newsletter (sign-up required) • Texas REALTOR® Hill Visits • Texas REALTOR® legislative contact teams • Opportunity races • Candidate interview Program • Voter-registration drives • REALTOR® delegate program • REALTOR® Candidate Academy • State and national calls for action
Issues Mobilization Local issues advocacy	The Issues Mobilization Committee exists to help local REALTOR® associations identify and act on local ordinances that affect Texas REALTORS® or private-property owners.

To learn more about any of these areas, visit TexasRealtors.com > Govt & Politics.



I will invest!

- \$5,000 Golden R \$110 110 Club
 \$2,500 Crystal R \$35 Sustaining Member
 \$1,000 Sterling R Other _____
 \$250 Capitol Club

Today's Date _____

Name _____

Company _____

Assn. Name _____

Send me information about RPAC's President's Circle

Payment method

Check (make check payable to TREPAC)

Credit Card (fill out information below)

Form of credit card: Personal Corporate

Type of credit card: MC VISA AMEX

DISCOVER

Charge my card a one-time investment of \$ _____

Charge my card \$ _____ per month for _____ months

Starting on _____

Account number: _____

Expiration date: _____

Name on card: _____

Billing address _____

City/State/ZIP _____

Signature: _____

Return pledge card and payment to:
TREPAC/Texas Association of REALTORS
Political Action Committee
P.O. Box 2246, Austin, TX 78768-2246.

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