

Table of Contents

- 1) Purpose of Handbook**
- 2) EDCAR Affiliate Committee**
- 3) Guidelines for Affiliate Conduct**
- 4) Realtor/Affiliate Meetings**
- 5) Realtor/Affiliate Weekly Meetings Policy**
- 6) Guidelines for Affiliate Conduct at REALTOR® Meetings**

Purpose of Handbook

This Affiliate Handbook has been established to provide Affiliate members with an introduction to the policies and procedures established by the Affiliate Committee of the El Dorado County Association of REALTORS® (EDCAR).

Affiliate members are expected to be familiar with the contents of this handbook and adhere to all of the policies and procedures contained herein.

EDCAR Affiliate Committee

The Affiliate Committee serves as a forum whereby all Affiliate members of EDCAR can meet to assess their specific needs and the needs of EDCAR REALTORS®, and to develop the means for effectively interacting.

The Affiliate Committee is chaired by an elected Affiliate Director and works in conjunction with the EDCAR Membership Committee to recruit new Affiliate members.

The Affiliate Committee makes recommendations to the EDCAR Board of Directors for implementation and offers an orientation program for all new Affiliate members.

EDCAR provides a printed Affiliate Membership directory in conjunction with the Affiliate members to promote their business relationships with REALTORS® and the community.

Goals and Objectives

- 1) *To* hold regular monthly meetings.
- 2) *To* provide a single point of contact for coordinating Affiliate participation at EDCAR functions and committee activities.
- 3) *To* coordinate Affiliate member speakers for monthly and weekly REALTOR® meetings, etc. on changes or updates in the Affiliate industries.
- 4) *To* help recruit new Affiliate members.
- 5) *To* educate Affiliate members as to their member benefits and the use of the Affiliate logo.
- 6) *To* provide articles or news stories for inclusion in local media, newspapers, etc.

Guidelines for Affiliate Conduct

In order to enhance, improve and maintain good working relationships among the Affiliate and REALTOR® members of EDCAR, the Affiliate Committee has established the following guidelines for professional behavior:

- 1) Affiliate company representatives should meet initially with real estate office managers/brokers when establishing contact for the first time.
- 2) Office visits will be kept appropriately short and deal with business matters.
- 3) All literature distributed will be current, dated, and not of a personal nature.
- 4) Affiliates will conduct themselves and their business with honesty and truthfulness.
- 5) Affiliates will not disparage Affiliate competitors.
- 6) Affiliates will dress in appropriate business attire.
- 7) Affiliates will act in a professional and courteous manner while visiting REALTOR® offices:
 - a) Permission will be requested and must be granted before making personal or "other" business telephone calls.
 - b) Affiliate representatives will be respectful of other Affiliates who may be visiting at the same time.
 - c) Affiliates will identify themselves and state their business as soon as they enter an office.
- 8) Affiliates will respect the privacy of REALTOR®'s desk area, computer stations, mailboxes, etc.

REALTOR®/Affiliate Meetings

DIAMOND SPRINGS

Day: Wednesday
Time: 8:30 a.m.
Location: Lion's Hall
4701 Missouri Flat Road
Diamond Springs, CA

CAMERON PARK

Day: Thursday
Time: 8:30 a.m.
Location: Cameron Park Community Center
2502 Country Club Drive
Cameron Park, CA

Typical Agenda

- ◆ Call to Order and Pledge of Allegiance
- ◆ Introduction of new members and guests
- ◆ Introduction of Affiliates
- ◆ EDCAR Committee Report
- ◆ Lender/Title/Insurance Reports
- ◆ EDCAR announcements
- ◆ Drawings and Tour notes
- ◆ Haves & Wants
- ◆ Homes on Tour Sheets

Do not disrupt the meeting during their short time. If you need to discuss something with another member, do it before or after the meeting or step outside.

REALTOR®/Affiliate Weekly Meetings Policy

Weekly meetings are held in Cameron Park and Diamond Springs for the benefit of Association members only.

The meetings are funded by REALTOR® and Affiliate annual membership dues collected by EDCAR.

The following are definitions of membership:

- 1) **REALTORS®:** Any REALTOR® may attend, regardless of Association membership. The National Association of REALTORS® (NAR) dictates that REALTOR® as part of the “Association of Choice Membership Policy.”

- 2) **Affiliates:** Only current Affiliate members (Designated Affiliates or Associate Affiliates) of the El Dorado County Association of REALTORS® (EDCAR) are eligible to attend meetings.

- 3) **Guests:** Members may bring a guest to the meetings on a *one-time basis only*. Guests who wish to attend more often must apply and pay for the appropriate class of membership.

Meeting Coordinators will endorse this policy and refer any problems to the EDCAR office.

Guidelines for Affiliate Conduct at REALTOR® Meetings

The main objective of the weekly REALTOR® meetings in Placerville and Cameron Park is to prepare for the weekly tour of listings and receive updates and announcements of items which have an effect on the real estate industry and REALTORS®.

Affiliate members are invited to introduce themselves when asked by the meeting coordinator and visit with others in attendance before and after the meeting. Affiliate members can provide fliers about events and programs they are offering or sponsoring, or other informative fliers (such as lender “rate sheets”, newsletters, or educational publications). Your business marketing materials are confined to fliers, brochures, or business cards on the entry table only. No Plastic flier or business card holders. All fliers, except those of the affiliate providing the lending reports, must be placed only on the entry table(s). Information should be timely, dated and pertinent to the real estate industry. **Upon leaving the meeting, affiliates must pick up any remaining fliers or information.**

Any announcement about a sponsored activity, special offering or affiliation change should be arranged with the meeting coordinator **prior to the start of the meeting.** Affiliates will usually be offered an opportunity for a short announcement in the beginning minutes of the meeting. Affiliates **may not** pitch any listings, MLS or non-MLS, or open houses for REALTORS® and/or MLS members.

Unless you are giving the Lender Report, your rate sheets are restricted to the entry table(s).

Lenders are given an opportunity weekly to represent their industry in giving a general report about the business; i.e., the “Lender Report”, which is to be a generic report, but can include “special” loan programs that are available, however, no specific details of any transactions. This report is not the time to promote yourself or your company, but rather to represent **all** of the affiliates in your profession with an informative update about pertinent matters. Please remember to present your report in a positive manner, without being negative about any competitor, whether they are local, national or internet based. **This applies to all affiliates; any announcements or reports should be presented in a positive manner without negative comments.** If you want to sign up to give a lender report, ask the meeting coordinator for the name of the person in charge of such assignments and contact that person, or call the EDCAR office. You will need to read and agree to the specific guidelines available for this report. Due to time constraints, reports should be limited to two minutes.

Insurance agents are given an opportunity monthly to represent their industry in giving a general report about the business; i.e., the “Insurance Agents Report”, which is to be a generic report, but can include “special” programs that are available, however, no specific details of any transactions. Insurance Affiliates alternate with Title Company representatives to give a general report about their industry including any special programs. This report is not the time to promote yourself or your company, but rather to represent **all** of the affiliates in your profession with an informative update about pertinent matters. Please remember to present your report in a positive manner, without being negative about any competitor, whether they are local, national or internet based. **This applies to all affiliates; any announcements or reports should be presented in a positive manner without negative**

Guidelines for Affiliate Conduct... Continued

comments. If you want to sign up to give an insurance agents report, ask the meeting coordinator for the name of the person in charge of such assignments and contact that person, or call the EDCAR office. You will need to read and agree to the specific guidelines available for this report. Due to time constraints, reports should be limited to two minutes.

Affiliate Spotlight

The Affiliate Spotlight is another opportunity open to Affiliates that allows a “2-minute commercial” during the assigned tour meeting. In addition to speaking for 2 minutes, the Affiliate Spotlight designee is also allowed a small display on the entry table (flyer stand, etc.) and additional marketing materials can be placed on the agent tables. The Affiliate is responsible to pick up all of their material at the end of the meeting.

The Affiliate Spotlight will once a month at the third meeting of the month at the Cameron Park Tour and at the Diamond Springs Tour.

Detailed information regarding the various reports is found on the following page.

1. Affiliate Spotlight

At the beginning of the year, a schedule for the **Affiliate Spotlight** is prepared. Any EDCAR Affiliate can request a spot on this schedule. The Affiliate Spotlight is an opportunity open to Affiliates that allows a “**2 minute commercial**” during the assigned tour meeting. In addition to speaking for 2 minutes, the Spotlight designee is also allowed a small display on the entry table (e.g., flyer stand). The Spotlight Affiliate can also place additional marketing material on the agent tables. However, the Affiliate is responsible for picking up all of this material at the end of the meeting. (Affiliate Handbook)

The Affiliate Spotlight occurs once a month at the Cameron Park Tour and once a month at the Diamond Springs Tour.

2. Lender Report

EDCAR Affiliates who are **Lenders** are given an opportunity each week at each tour meeting to present a very brief (2-3 Minute **MAXIMUM**), general report about the business. While it is designed to be generic, it can include information about “special” loan programs that are available; however, no specific details of any transactions should be included. This weekly report is not the time to promote yourself or your company but rather an opportunity to represent **all** of the Affiliates in your profession in a positive manner.

3. Insurance Report

The **Insurance Report** is another general report given once every other month by those EDCAR Affiliates in the insurance industry (2-3 Minute **Maximum**). It is very much like the Lender’s Report--designed to be generic, but can include information about “special “ insurance programs that are available; however, no specific details of any transactions should be included. This monthly report is also not the time to promote yourself or your company but rather an opportunity to represent **all** of the Affiliates in your profession in a positive manner.

4. Title Report

The Title Report is also a general report given by EDCAR Affiliates in the Title Industry (2-3 Minute **Maximum**). It is very much like the Insurance Report--designed to be generic. No specific details of any transactions should be included. This monthly report is also not the time to promote yourself or your company but rather an opportunity to represent **all** of the Affiliates in your profession in a positive manner

5. Policy for Violation

If one of the above conditions is broken for any Report/Spotlight, the following consequences may be applicable:

1. A formal warning may be issued one (1) time, if it is believed that the violation was unintentional.
2. If parties such as the Affiliate Director/Board of Directors have reason to believe that the violation was done with full knowledge of the rules, a suspension of twelve (12) months will be issued from giving any report (Lender/Insurance/Title) or Affiliate Spotlight.
3. The Affiliate in question may request a hearing with the Board of Directors if they believe a suspension is applied unjustly.

Cyndi Romano
2016 Affiliate Director
El Dorado County Association of Realtors®

If you have any questions regarding this handbook or its contents, please contact the Association. EDCAR very much appreciates our Affiliates and all the time and effort that they contribute to our Association.