2018 PRESIDENT'S LIAISON HANDBOOK

National Association of REALTORS®



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About This Document

This handbook is designed to serve as an all-in-one reference guide for both REALTORS[®] interested in becoming a President's Liaison as well as current President's Liaisons. The handbook is divided into two parts – *About the President's Liaison Program*, which contains everything you need to know about the program as you make your decision to apply for an appointment, and *For President's Liaisons* which has information and instructions on forms as they relate to the role and staff's contact information.





ABOUT THE PRESIDENT'S LIAISON PROGRAM



Program Overview

President's Liaisons are U.S.-based NAR members, appointed by the NAR President to serve as his or her liaisons to real estate professionals in their assigned country. They help maintain NAR's relationships with its bilateral partners. Appointees are generally CIPS designees and, ideally, have some knowledge of the country's real estate practice, culture, and language. Appointments are made each year prior to the REALTORS[®] Conference & Expo and run concurrent to the NAR presidential term, with the term beginning at the conclusion of the Conference. For a current list of President's Liaisons, please see <u>NAR's Global Alliances Network</u>.

President's Liaisons serve for a term of one year. However, in many cases, it takes longer than one year to develop significant working relationships with international partners. With this in mind, consideration will be given to re-appointment where such action will strengthen and intensify relationships. In most cases, President's Liaisons will not serve for more than four terms.

President's Liaisons are not empowered to officially represent the views and positions of NAR, except when specifically directed to do so by the NAR President.

Global Objectives

NAR's Global mission statement is "to render the global real estate markets accessible, profitable and ethical for *REALTORS*® to conduct business." To that end, President's Liaisons work to help maintain NAR's relationships with its bilateral partners around the world and help fellow NAR members understand business in the country to which they are assigned. Specifically, the objectives of the program are:

- to promote the REALTOR[®] brand through International REALTOR[®] Membership, education, products and services;
- to drive business to NAR by inciting bilateral partners to promote NAR's products and services to their members.

President's Liaisons should assess the ability and willingness of the bilateral partners to work with NAR toward the aforementioned objectives, and render their conclusions to NAR staff and Regional Coordinators.

President's Liaisons should identify organizations and private companies located in the country to which they are assigned that could potentially collaborate with NAR to achieve its objectives and call the attention of NAR staff to these potential new partners.

Responsibilities of the President's Liaisons:

- 1. To the extent that participation in the Cooperating Association's annual meeting or convention can potentially help NAR reach its objectives, the President's Liaisons are encouraged to attend the events as a representative of NAR.
- 2. When traveling to their assigned country on NAR business, President's Liaisons should identify potential partners in real estate, other than NAR's Cooperating Association notably master franchises, institutions of higher learning, exhibitions, property listing websites, professional networks and tour groups and meet with them to compare objectives. In doing so, President's Liaisons must keep in mind that any potential partner must institute a code of ethics compatible with that of NAR.

President's Liaisons should be prepared to share relevant information on their respective country's real estate industry with interested NAR members. Presidents Liaison's contact information will be housed in a directory on nar.realtor.

- 3. President's Liaisons, in conjunction with the Ambassador Association, host the president, executive officer and/or delegation of the respective international Cooperating Association during the REALTORS[®] Conference & Expo. This includes but is not limited to:
 - Attending special meetings set up by NAR staff with the leaderships of the Cooperating Association and NAR.
 - Participating in events organized by the Cooperating Association.
 - Guiding and assisting the Cooperating Association's delegation to relevant meetings and social activities.

President's Liaisons should contact the Cooperating Association's delegation in advance of their arrival to plan an in-person meeting and go over the Conference agenda. NAR staff will provide President's Liaisons with periodic lists of Cooperating Association registrants at the convention.

- 4. President's Liaisons meet twice annually at the REALTORS® Conference & Expo in November and the REALTORS® Legislative Meetings & Trade Expo in May. President's Liaisons are urged to attend meetings of the Global Business and Alliances Committee, especially at the REALTORS® Conference & Expo when many foreign delegations are present. As official appointees of the NAR President, President's Liaisons are required to serve on and participate in the meetings of the Global Alliances Advisory Board. President's Liaisons who cannot attend this meeting must request to be excused. Attendance by President's Liaisons at the meetings of the Global Alliances Advisory Board will be a determining factor in the travel grant application process and the reappointment process.
- President's Liaisons communicate regularly with the Ambassador Associations assigned to the Cooperating Associations. In addition to serving as the liaison between the international partner and the NAR President, a President's Liaison serves as the link between the Cooperating Associations and Ambassador Associations when needed.
- 6. President's Liaisons must communicate directly with NAR Global Staff and the Amabassador Association before planning a trade mission in order to best utilize resources from across our membership base, associations and bilateral partners.

- 7. President's Liaisons are required to submit annual reports documenting activities concerning the Cooperating Association throughout the year. If periodic reports are provided as a result of visits to the international partner country and/or other activities, an annual report may not be necessary.
- 8. NAR President's Liaisons may be asked to assist NAR staff in the event of a dispute or problem about a specific Bilateral Agreement or Memorandum of Understanding. This may require special meetings and/or conference calls to agree upon a course of action. President's Liaisons should be familiar with the terms of the partnership between NAR and the Cooperating Association.
- 9. President's Liaisons should communicate regularly with NAR Global staff and the Regional Coordinator throughout the year to discuss relevant aspects of the NAR/Cooperating Association relationship, including association leadership changes, and country real estate market information. Although President's Liaisons are accountable to the NAR President, generally they communicate with the Chair of the Global Business and Alliances Committee, the Global Alliances Advisory Board, the assigned Regional Coordinator, and/or the Global Alliances staff who communicate in turn and if necessary, with the NAR President.

Month	Event	Hours
January	Work with Regional Coordinator and NAR staff to set goals for the coming year. Attend the year's first webinar.	
February	Communicate via phone/skype/email with Cooperating Association, RC and Ambassador Association.	
March	Invite Cooperating Association leadership to REALTORS® Legislative Meetings & Trade Expo.	1 hour
April	Follow up with Cooperating Association leadership to REALTORS® Legislative Meetings & Trade Expo.	
May	Mandatory attendance at REALTORS® Legislative Meetings & Trade Expo in Washington, D.C. and necessary post-meeting follow up.	About 5 days
June	Cooperating Association meeting in respective country or region (one trip a year and can fall in <i>any month</i>), pre-trip preparations such as discussing with RC and staff and applying for a grant, post-trip follow ups such as debriefing with RC and staff and compiling a trip report.	
July	Communicate via phone/skype/email with Cooperating Association, RC and Ambassador Association. Attend a PL webinar.	2 hours
August	Work with NAR Staff and RC to invite Cooperating Association leadership and general membership to REALTORS [®] Conference & Expo in November.	2 hours
September	Send invite reminders to Cooperating Association leadership and general membership to REALTORS® Conference & Expo.	2 hours
October	Work with NAR Staff, RC and AA to help Cooperating Associations schedule and attend relevant events at Conference. Attend a PL webinar.	4 hours
November	REALTORS® Conference and Expo and necessary post-meeting follow up.	About 5 days
December	Debrief Cooperating Association to determine which events were useful and then start to determine goals for next year that will help expand upon issues or trends of interest to Cooperating Association.	3 hours

Sample Time Commitment for a President's Liaison



NAR Regional Coordinators

Each President's Liaison serves within one of the following regions:

- 1. North America, Central America, Caribbean
- 2. South America
- 3. Asia/Pacific
- 4. Western Europe, Israel, Turkey
- 5. Central/Eastern Europe, Middle East, Africa

Each region is assigned a Regional Coordinator, who monitors and, in some cases, oversees the activities of all President's Liaisons. Regional Coordinators are also appointed annually by the NAR President. President's Liaisons can expect to meet with their Regional Coordinators at NAR meetings and should contact them with specific issues throughout the year.

2018 Regional Coordinators:

- 1. North America, Central America, Caribbean: Carla Rayman, Sarasota, FL, carla@carlarayman.com
- 2. South America: Mario Rubio, Annandale, VA, mariotrubio@gmail.com
- 3. Asia/Pacific: Nancy Suvarnamani, Chicago, IL, nancy@century21sgr.com
- 4. Western Europe, Israel, Turkey: Hanne Sagalowsky, Dallas, TX, hanne@DavePerryMiller.com
- 5. Central/Eastern Europe, Middle East, Africa: Zola Szerencses, Orlando, FL, zola@2ndhomemarkets.com

APPLICATION



Application

Due to NAR Staff, Supap Jitta, Manager, Governance & Global Volunteer Services at <u>sjitta@realtors.org</u> by April 15 of each year for the appointment serving the following year. You may be asked to come to NAR's Legislative Meetings in May in Washington, D.C. for an in-person interview with the Regional Coordinator of the country to which you wish to be assigned.

Please use additional paper as needed and feel free to submit additional information that relates to your candidacy. All appointments are made by the NAR President. If appointed, you must be able to attend the Global Alliances Advisory Board meetings at the REALTORS® Legislative Meetings and Trade Expo, and the REALTORS® Conference and Expo.

Personal Information

Name:
Address:
(as it should appear on your PL business cards)
City/State/Zip Code: (must be a U.S. address)
Email:
Phone:
Your local REALTOR® Association:
Please describe your involvement in your local and/or state REALTOR® Association:

Please list the **top 3** countries for which you would be interested in serving as President's Liaison.

Please limit your list to 3 or fewer:

Education

Are you a CIPS Designee? _____

If you are not a CIPS Designee, which CIPS courses have you taken?

Other Real Estate Education, Designations, or Certifications held:

Have you taken any other business education or hold other degrees that you think might benefit this position? If so, please describe them.



International Experience

List languages you speak (besides English) and estimate your degree of proficiency.

Describe any in-depth knowledge you have of a particular country, region, or culture.

Describe your current level of involvement in international business.

What percentage of time do you spend on international business activities?

Please describe why you would like to be a President's Liaison.

Please explain how you can help NAR recruit International REALTOR[®] Members and NAR conference attendees, and/or promoting NAR courses in the country to which you would like to be assigned.



FOR PRESIDENT'S LIAISONS



Annual Schedule of PLs' Required Administrative Responsibilities:

Dates for some items may vary based on your specific country and goals

What	When	How
PL Commitment Agreement form	Appointed/reappointed PLs sign and turn in the form to NAR staff about 2 weeks after appointments are announced.	Due by email to NAR Global staff Supap Jitta <u>sjitta@realtors.org</u>
First PL WebinarNAR Global staff hosts this webinar either in December- Orientation and Goal Settingor early January		NAR staff will send the announcement, reminders, and log in information.
PL Goals	Due to Regional Coordinator and NAR staff, Supap Jitta by January 31.	Final goals due by email to Supap Jitta <u>sjitta@realtors.org</u>
PL Grant Application	 For trips between January 1 and March 31, applications are due on December 1 of the previous year. For trips between April 1 and June 30, applications are due on February 1. For trips between July 1 and December 30, applications are due on May 1. 	Due by email to Supap Jitta <u>sjitta@realtors.org</u>
PL Trip Report	30 days after the last day of the PL Trip. PL must debrief with RC and country staff executive before filling out the form.Due by email to Supap J sjitta@realtors.org	
Additional Webinars	Additional webinars will be hosted throughout the year. PLs will receive notices several weeks before each webinar.	NAR staff will send the announcement, reminders, and log in information.
NAR'S Legislative Meetings and Trade Expo	May. See dates on www.nar.realtor/midyear	PLs must attend in-person the Global Alliances Advisory Board Meeting at the NAR's Legislative Meetings and Trade Expo.
Reappointment Request (if you wish to be considered for a reappointment in the following year)	Early-Mid June.	Supap Jitta will send a questionnaire to PLs. PLs must reply by a deadline to be determined.
REALTORS® Conference and Expo	November. See dates here: www.nar.realtor/convention	PLs must attend in-person the Global Alliances Advisory Board Meeting at the REALTORS® Annual Conference and Expo.



Commitment Agreement

NAR President's Liaisons: required duties and obligations

In consideration of the opportunity to serve as a NAR President's Liaison, and to receive any and all benefits which result from this endeavor, including without limitation, recognition of Liaison's participation therein, opportunities for Liaison to interact with colleagues in foreign markets, and any travel reimbursements for which Liaison qualifies, the undersigned Liaison agrees and commits to the following:

Please initial each of the below points and sign below. Return form by the date specified by staff to sjitta@realtors.org.

- 1. ____ To attend REALTORS[®] Legislative Meetings & Trade Expo, and REALTORS[®] Conference & Expo, and participate in all events pertinent to President's Liaisons, including without limitation the meetings of the Global Alliances Advisory Board.
- 2. ____ To host the delegation from the foreign association at the REALTORS[®] Conference & Expo, and to facilitate their participation at the business meetings and social events to which they are invited.
- To communicate regularly with your Cooperating Association and to inform its representatives, the Global Alliances Advisory Board and your Regional Coordinator of news, updates and problems, and to offer assistance with same in a timely manner.
- 4. ____ To be familiar with the terms of any agreements between NAR and your Cooperating Association and to assist NAR's Commercial and Global Services staff with disputes or problems that involve your Association's Global Partner.
- 5. ____ To the extent that participation in the Cooperating Association's annual meeting or convention can potentially help NAR reach its objectives, the President's Liaisons are encouraged to attend these events as a representative of NAR, promote International REALTOR® Membership; promote NAR courses, certifications and designations; encourage participation by foreign delegates in the annual REALTORS® Conference and Expo.
- 6. ____ Assist U.S. REALTORS[®] who seek to establish business relationships or engage in transnational referrals by "introducing" them to appropriate contacts affiliated with the Cooperating Association.
- 7. ____ Provide Regional Coordinator and NAR Global staff with quarterly reports outlining relevant activities and policies, including relationships, trade mission plans and member business opportunities, as well as any communication with representatives from your country, and the assigned Ambassador Association.
- 8. ____ Submit a report to the Regional Coordinator and NAR Global staff following any official visit to your assigned country. A report template will be provided.
- 9. ____ To assist NAR, as needed, in gathering information on your Association's Global Partner and its real estate market and business practices, and in otherwise implementing the Bilateral Agreement between NAR and that Cooperating Association, as requested by NAR.

COMMITMENT AGREEMENT



- 10. ____ To at all times conduct yourself in a professional and ethical manner, and to not engage in any behavior or speech that is defamatory, obscene, unlawful or otherwise inappropriate, including without limitation any behavior or speech that constitutes harassment or discrimination based on race, sex, religion, age, national origin, disability or of any kind whatsoever.
- 11. ____ To immediately disclose any situation that arises in connection with your role as President's Liaison that actually or reasonably could present or be perceived to be a conflict of interest. While it is understood that you may have active cross-border business or that as a result of your role, opportunities may arise to develop business in your assigned country that is outside of your role as President's Liaison, a conflict of interest occurs when you are in a position to financially profit or otherwise personally benefit directly or indirectly because of your role as President's Liaison. Examples of such conflicts of interest include, but are not limited to, efforts to market properties or seek listings in your assigned country, to seek or promote a specific investment, joint venture or business relationship, efforts to seek or promote teaching or writing opportunities other than those owned or sponsored by NAR, consulting arrangements with a Cooperating Association or conducting non-NAR related business while traveling on a NAR travel grant. You must immediately report all actual or potential conflicts of interest to the Director of Global Alliances and the Senior Vice President of NAR Commercial & Global Services. Once you have reported the situation NAR staff will determine whether the situation presented poses a prohibited conflict of interest. Failure to comply with this paragraph may result in suspension or removal from your position as President's Liaison. Understanding the importance of global interactions on the real estate industry and the shared goals of REALTORS®, and acknowledging that NAR shall have the right to terminate the Liaison's service as a President's Liaison at any time for any or no reason, the undersigned Liaison hereby agrees and commits to meeting the requirements stated above.

Country:_____ President's Liaison Signature: _____

Print Name:

_____ Date: _____

Please e-mail your completed Commitment Agreement to Supap Jitta at sjitta@realtors.org. Failure to return the completed and signed agreement to the NAR offices may result in forfeiture of your President's Liaison appointment or your eligibility for NAR Travel Grants.





Travel Grant Policy

The objective of the National Association of REALTORS[®] Global Travel Grants program is to equitably provide reimbursement to President's Liaisons who travel abroad to represent NAR.

The travel grants provide partial support for travel and subsistence for a meeting or conference in the applicant's assigned country. Grants cannot be provided for travel to regional real estate conferences and meetings in countries other than the assigned country, or for domestic travel to NAR meetings for hosting visiting delegations. Grants are issued as reimbursements; applicants must complete a trip report and expense report within 30 days of return (see below for reimbursement policy).

Requests for full funding are rarely granted, so applicants must be prepared to cover a percentage of their foreign travel through other means. Grant award amounts will be determined based on resources and will be prioritized by the leadership of the Global Alliances Advisory Board and by the Global Business and Alliances Committee.

Grant recipients must attend the bi-annual meeting of the NAR Global Alliances Advisory Board. Direct requests for NAR-member travel from foreign Cooperating Associations will be denied.

Grant Award Criteria and Priorities: Travel grants will be prioritized based on the applicants' support of NAR Global's objectives. *Every applicant, regardless of prior experience, is strongly encouraged to review his or her application with his/her Regional Coordinator prior to submitting it.*

Eligibility: Applicants must be current NAR President's Liaisons. Applicants must attend all meetings of the Global Alliances Advisory Board to be eligible for grants. Partial travel support from the applicant's local/state association of REALTORS[®], or from other sources is welcome and does not make the applicant ineligible, but must be disclosed.



Application Deadlines: There will be three grant periods each year:

- For travel planned between January 1 and March 31, the application deadline is December 1 of the previous year.
- For travel between April 1 and June 30, the application deadline is February 1.
- For travel between July 1 and December 31, the application deadline is May 1.

The deadline is for receipt date. Applications will be reviewed within two weeks of each Travel Grant Deadline. Priority will be given to grant applications that advance the international objectives of NAR.

An applicant must send copies of:

- a Travel Grant Application which includes the conferences or other events, along with the amount of support requested;
- a description of how the proposed travel would benefit NAR's Global Network; if applicable, a description of the
 presentation/educational programming the applicant has been asked to make by the Cooperating Association in the
 country to which the President's Liaison has been assigned;
- a brief description of any non-NAR business you expect to conduct while traveling to the country;
- a budget for the proposed travel;
- a list of all current and pending travel funding (local/state association and/or other sources) and the amounts available for your proposed trip.

Send a complete copy of the application materials to Supap Jitta, Manager, Governance & Global Volunteer Services, at <u>sjitta@realtors.org</u>.

To receive reimbursement, travel must be pre-approved by the chairs and vice chairs of the Global Alliances Advisory Board, the Global Business and Alliances Committee, and be confirmed by NAR Global. Following travel, grant recipients must submit a trip report.

If grant recipients fail to request approval prior to traveling abroad on behalf of NAR and/or submit a trip report within 30 days of the trip, there is no guarantee that expense reimbursements will be processed. The expense refund procedure is now fully electronic: all documents are scanned by the President's Liaison, including receipts. We strongly urge you to conserve original receipts, especially those for expenses exceeding US\$ 75.00. See NAR member travel policy for complete details.

Global Alliances Travel Grant Application

Request for Approval for Official National Association of REALTORS[®] Business-Related International Travel. **Please e-mail** completed document or send questions to Supap Jitta at <u>sjitta@realtors.org</u>. **Please do not use abbreviations**.

Full Name:		
President's Liaison to:		
Departure airport in the US:	For Travel to City/Country:	
Name of Event to be Attended: (specify if A	nnual General Meeting, Conference, Other Event	
or standalone visit)		

Dates of Event: _____

Requested Grant Amount (application will not be considered without a detailed budget):

Category	Cost		Total	Notes (please be specific)
Air Fare				
Hotel	/night	nights		
Meals	/day			
In-country travel				
Airport parking	/day	days		
Miscellaneous				

Total \$ _____

Any other Travel Funding Amount (detail personal funds, funding by local association or other) that you will receive, or have received in the last twelve months:

Description of Planned Presentation(s) Abroad:

If you are a seasoned PL (2 or more years on the job), did you travel to your country in previous years? If so, what was the purpose of your trip(s)? What were the successes and challenges?

Please state the **annual goal(s)** of your country that you had establised with your RC, Cooperating Association and staff contact:



GLOBAL ALLIANCES TRAVEL GRANT APPLICATION

Please clearly list **3 trip goals**, which are not necessarily your annual goals, for this trip and how they 1) help you achieve your annual goals during this appointment and 2) benefit the NAR international network and promote business development between NAR and the Cooperating Association in the long run.

Description of any non-NAR business to be conducted while traveling:

Have you contacted relevant stakeholders (ex., Regional Coordinator, Ambassador Association, past liaisons, NAR staff) for background, advice, and/or coordination in conjunction with this visit?

I certify that this travel and all expenses claimed will be incurred on official business on behalf of the National Association of REALTORS[®] and its Commercial and Global Services Team. I understand that I will not be reimbursed for my expenses until I have submitted a complete field report on my trip.

Signed: _____ Date: _____

Full Name: ______



NAR Member Reimbursements

Instructions:

- 1. Access the NAR Member Expense Report via <u>www.nar.realtor/membership/nar-member-travel-policy-and-</u> <u>expense-report</u> or visit <u>www.nar.realtor</u> and type "Member Expense Report" in the search box.
- 2. Complete the form online. Ensure the sections highlighted in red are completed.
- 3. Print the completed form and make copies of required receipts (airfare, hotel, and any other expense over \$75).
- 4. Sign the expense report and scan it, along with receipts, into a single PDF file.
- 5. Submit the document, along with the required receipts via e-mail to <u>expenses@realtors.org</u>, and please copy Supap Jitta, Manager, Governance & Global Volunteer Services: <u>sjitta@realtors.org</u>.
- 6. If you have questions regarding covered expenses for a specific meeting, please contact Supap at sijitta@realtors.org or (312) 329-8829.
- 7. If you have questions regarding the completion of an expense report or the member travel policy, please contact Candace Bodnar, Senior Finance Representative at (312) 329-8824.

6. Was other NAR Leadership in attendance? NAR Staff?

NAR President's Liaison Trip Report Template

Please e-mail completed forms to Supap Jitta at <u>sjitta@realtors.org</u>. Trip Reports must be submitted either before or with your member expense report, but in separate files.

1.	Name:
2.	Assigned Country:
3.	Dates of Visit:
4.	Grant amount received from NAR: \$
5.	Cooperating Association(s) visited:

7. What were the goals of the trip prior to departure? What potential deliverables could be identified prior to departure?

8. Who did you meet with and what was the format of the meetings? Were you a featured speaker? If so, what was the topic of your presentation?

9. At the trip's conclusion, which goals and deliverables were achieved and which were not? For those that were not, what were the obstacles?

NAR PRESIDENT'S LIAISON TRIP REPORT TEMPLATE

- 10. What follow up to the trip will be carried out?
- 11. What are your observations during this trip with regard to real estate conditions and general economic conditions in this country?

12. How are NAR's products and services perceived by real estate brokers and agents in the country you visited?

- 13. Other highlights or information?
- 14. Please provide a high-level summary of your visit and/or NAR's partnership with the Cooperating Association for *NAR Leadership.* For example, executive staff change, new or renewed IRM agreements, etc.

15. Is there any detailed information, as it pertains to the cooperating association's partnership with NAR, that *NAR staff* should be aware of? For example, a difficulty arranging the meeting, specific questions about NAR programs, etc.