



## **Chapter Education Handbook**

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# I. Successful Chapter Education Meetings

## Type of Education Program

1. Determine if program is to be a RLI LANDU Course or a Chapter developed program
2. Determine if program is in-person or webinar format

### *RLI LANDU Course*

1. If conducting a RLI LANDU Course, go to the RLI web site, LANDU Education, LANDU Instructor Center to choose a course and instructor
2. See [Appendix A](#) for the procedure for requesting a course by the Chapter Administrator
3. After approval from RLI, follow the information below on setting up the program

### *Chapter Developed Education Program*

1. If conducting a chapter developed education program, determine a topic
2. Present programs on subjects pertaining to the business of land development, sales, financing, etc. It is especially important to present speakers or programs, which will bring help and encouragement to the members who are having difficult times in the real estate business
3. Select an instructor to deliver the program and contact him/her directly and negotiate the instructor/speaker fee
4. See [Appendix B](#) for possible education topics and sources of instructors/speakers
5. After selecting topic and speaker, follow the information below on setting up the program

## Meeting Preparation

1. Meet with the hotel/meeting space coordinator and audio/video staff to arrange appropriate meeting space, including a registration table and chairs be placed outside the entrance.
2. Arrange for master billing of charges
3. Determine authorized signer for all charges
4. Review last minute changes
5. If it is a multi-day event, continue to communicate with hotel staff to ensure that all aspects of the event run smoothly

## Meeting arrangements

1. Reserving Meeting Space: As far in advance as possible reserve meeting space with the hotel. Many times, if a meal is being served in conjunction with the meeting there will be no charge for the meeting room. Shop around because there is a big difference in costs from hotel to hotel. Be careful to be reasonable in your expectations and not overcommit your chapter financially.
2. Food
  - a. If food is being served, the hotel may request the final count of attendees 48-72 hours prior to the event

- b. When ordering food, you need to keep in mind not only the cost of the meal, but also the hotel automatically adds on charges for tax and gratuity. Each hotel charges a different amount
  - c. Make arrangements to have water and coffee/sodas (if being served) to be refreshed throughout the day
- 3. Audio/Visual Equipment
  - a. Order all audio/visual equipment that is needed - overheads, screens, microphones, etc. If you bring your own projectors be sure to order a screen
  - b. Also order all extras needed for the meeting room, such as chalkboards, cork boards, flip charts, etc. or bring your own to save on costs
  - c. The best time to bargain for extras in the meeting room is BEFORE the contract is signed with the hotel
- 4. Speaker(s)
  - a. Obtain a biographical sketch from the speaker well in advance of the meeting and provide a copy to the person who will make the introduction
  - b. Make sure to find out any requests the speaker may have such as audio/visual, handouts, etc.

### Room Set-Up

1. You will need to give an estimated number of people attending to determine the room size.
2. You will need to determine how to arrange the tables and chairs throughout the room i.e.; classroom, conference, table rounds, etc.
3. Specify if you need a raised platform for the speaker's or head table. This costs extra.
4. Arrive early for changes that may be needed in set up
5. Agenda
  - a. Prepare an agenda and give a copy beforehand to officers, speakers and attendees.
  - b. Put time slots on the agenda
  - c. Agendas and sign in sheets should be typed and professional looking

### Determining Price of Program for Attendees

1. Chapter should not lose money on conducting programs, unless it is pre-determined to do so
2. Determine cost of conducting the program, including meeting room space, rental of equipment, food/drinks, instructor/speaker fees and travel, RLI Royalties (if LANDU Course) and any other expense for the program
3. Determine the price of the program for each attendee to cover the expenses and provide a profit to conduct future programs
4. Utilize Chapter Program Budget Worksheet ([Appendix C](#))
5. Chapters are reminded to charge non-RLI members at least 25% more for chapter programs to show the value of RLI membership.

### Consider Sponsors to Defray Expenses and Reduce Cost for Attendees

1. Develop list of potential sponsors

2. Determine the value to the sponsor to support the program and defray cost for attendees
3. Determine best person to present opportunity to potential sponsor

### Registrations

1. Determine registration and payment process for students to attend the program
2. Determine the cancellation and refund policy for the program
3. Track students through the registration vendor and bring final attendee list to program for check-in process
4. At the registration/check-in table, include nametags for all attendees, handouts, evaluation etc. Utilizing another table, place chapter and RLI membership applications, member service packets, upcoming chapter and national RLI event information
5. Meet with hotel/meeting space coordinator prior to the meeting to discuss final details. Make sure the hotel coordinator is aware of who will be the authorized account signer, as well as being the only one authorized to make any changes
6. This is the time to discuss any changes, additions, and concerns with the hotel. If the meeting is beginning early in the morning, this meeting is usually held the day before

### How to Promote Attendance

1. Be sure the meeting is publicized well in advance through newsletters, flyers, etc. and follow up on the publicity close to the meeting date, particularly to those who have not responded
2. Create flyer for program using the RLI Chapter Course Flyer Template in the Chapter Resource Center, Tool Box, note that the template is a WORD document to update all the program information and it is suggested to save as a PDF document before sending it to members
3. Promote program on chapter website and social media (Facebook, Twitter, LinkedIn, etc.)
4. Chapter Administrator submit program information (both LANDU course and chapter developed program) to RLI so it can be promoted on RLI's website
5. The chapter might want to consider paying for tickets of new members for first program
6. Consider a drawing or a door prize to promote attendance
7. Make a list of who should really attend and call them
8. Email an invitation to all Chapter members by Chapter Administrator using the database through the RLI website (riland.com), My Account, CHAPTER LEADERSHIP, Chapter Admin-Access Database

### Conduct the Meeting

1. Always start the meetings on time and adjourn on time. Do not let them drag. Keep them interesting and to the point
2. Let the Board of Directors conduct the chapter business - keep the general meetings for education or social functions
3. Have a nametag for every member so that the friendliness prevails. This is especially important in identifying and welcoming new members
4. Let the program committee do its job. Don't dilute the meeting with a lot of business or trivia.

5. Encourage open forums and question and answer sessions
6. Vary the programs
7. If at all possible, hold the meetings at a luncheon or dinner session and in an attractive and convenient location

### **Day of Meeting Preparation**

1. Determine chapter person(s) who will be on site to conduct the education program
2. Arrive in meeting room approximately 1 hour prior to meeting to double check on room arrangements. Check all audio/video equipment to ensure they are all working correctly.
3. Prepare/lay out nametags for all attendees
4. Check-In attendees
5. Provide handouts and program evaluation
6. Make sure RLI and chapter membership applications are available
7. Provide chapter Member Service packets
8. Have available calendar and information about upcoming chapter and RLI events
9. Have available information about the ALC designation and requirements on how to attain it
10. Have available a schedule of RLI Land University courses

### **End of and After Education Meeting**

1. Remind attendees to fill out evaluations for the program
2. Collect evaluations for tabulation of results and provide to chapter board or education committee and implement changes as needed
3. Collect tests and give to instructor for grading
4. Send tabulated evaluation results to instructor and RLI (if LANDU course)
5. Send Thank You notes to speakers/instructors and sponsors
6. Pay any outstanding bills for the program (including Royalties to RLI)

### **Continuing Education Credit**

1. Chapters can contact the State or Local REALTOR Association for information on how to obtain Continuing Education Credits for RLI LANDU courses and Chapter developed education programs

### **Chapter Education Meeting Checklists**

1. Chapter Education Meeting Check Lists can be found in [Appendix D](#)

### **Suggested Officer Duties and Responsibilities**

1. President:
  - a. Welcome guests upon arrival
  - b. Introduce guests (head table)
  - c. Introduce guests (other tables)
  - d. Conduct question/answer session
  - e. Conduct "thank yous"

- f. Write, "thank you" to speakers
2. Vice President
    - a. Check catering schedule
    - b. Welcome guests upon arrival
    - c. Introduce program and speaker
  3. Secretary
    - a. Set up program space and A/V equipment
    - b. Conduct program registration/check-in of attendees
  4. Treasurer
    - a. Conduct program registrations
    - b. Pay all program costs
    - c. Determine if profitable

## II. Chapter Sponsored RLI Programs/Events

### *Marketing Sessions Program*

1. The success of any marketing session is dependent upon:
  - a. Complete knowledge of the physical property
  - b. Complete knowledge of the financial aspects of the property.
  - c. Complete understanding of the needs and motivation of the property owner.
  - d. Exclusive control of the property.
2. What You Will Need:
  - a. Have/Want Sheets
  - b. Mini Offer Forms
3. The president or a member selected by the president needs to attend a "Let's Make Deal\$" Session at the National Land Conference to see how these work or jointly sponsor a Marketing Session with another chapter.

### *Suggested Agenda for Annual Chapter Meeting*

1. Chapter President calls to order
2. Invocation
3. Moment of silence for members who are ill or have passed away
4. Pledge of Allegiance
5. Introduction of new members
6. Introduction of principal speaker
7. Installation (See Oaths of Office)
8. Acceptance Address of Incoming President
9. Thank you to previous year's officers

10. Upcoming chapter and/or national events
11. Announcements
12. Adjournment



## Chapter Course Provider Procedures

Providers should review and follow the Chapter Course License Agreement. The below information is useful when organizing and conducting LANDU Courses.

### Course Set Up

1. Determine the Chapter Contact for the LANDU Course
2. Determine the On-Site Coordinator for the LANDU Course
3. The Chapter determines the LANDU Course to host and contacts an approved RLI LANDU instructor to schedule the course and location. For a list of approved RLI LANDU instructors, please visit the [LANDU Instructor Center](#).
4. Upon scheduling the course the Chapter shall input the relevant information: course title, date, location, contact person, phone number, registration directions, and instructor name, to the Chapter Portal of the RLI website.

To submit a course, please follow these four easy steps:

- Step 1: Navigate to 'Courses'
- Step 2: Select 'Add New+'
- Step 3: Complete all information\*
- Step 4: Click the 'Add' button

After submission of the Course, the Chapter will be sent an Invoice by email for the Course Scheduling Fee of \$250.00

5. Upon receipt of the Scheduling Fee Invoice, the Chapter will remit the \$250 Course Scheduling Fee which will be credited to the royalty payments to RLI. Send fee to:

REALTORS® Land Institute  
Attention: Amanda Morrone  
430 North Michigan Avenue  
Chicago, Illinois 60611

Upon receipt by RLI of the Scheduling Fee, the Chapter will be sent a Course approval email along with access to Course materials, which includes Facilitator Guide and Participants Guide. Once the scheduling fee has been received the course information will be promoted by RLI National Upcoming Courses web page.

*Note: RLI follows a no course cancellation policy. However, in the cases where a course provider is considering a course cancellation, RLI should be contacted immediately to see how to best serve those who registered. If the course is cancelled, the scheduling fee is non-refundable.*

6. RLI will send the following, for the Chapter to distribute to the attendees and instructor:
  - a. Electronic course materials which will include the official manuals, the exam, and sheets for responses. *An answer key will be sent which is **confidential** and should only be provided to the Instructor of the course.*
  
7. It is the Chapter's responsibility of distributing the appropriate course materials to the instructor and attendees. The materials can be distributed to the instructor and attendees as hard copies or electronically.
  - a. Instructors must receive the Instructor Guide, PowerPoint, Exam and Answer Key, and Evaluation form
  - b. Students must receive the Participant Guide, Resource Guide (if provided) and excel spreadsheets (if provided).
  
8. Make sure to send confirmation email to all course registrants. These confirmations should include the following information:
  - a. Payment amount received
  - b. Course title, date, time, and location
  - c. Contact information for questions i.e. phone contact number, contact name, email address
  - d. Special tools/supplies needed for the course i.e. calculators, should be noted in the confirmation. *Check with the instructor regarding what students should bring to class*
  - e. Whether meals will be provided or not. If not, include a list of nearby eateries
  
9. When managing the Chapter's Course registrations, please make sure to capture the following information from each attendee, which will be required for the course roster to RLI National:
  - i. First Name
  - ii. Last Name
  - iii. Company Name
  - iv. Email Address
  - v. Address
  - vi. City
  - vii. State
  - viii. Zip
  - ix. Phone Number

### **On Site Course Coordinator**

1. The On-Site Coordinator staffs the registration table near the classroom for registrant check-in on all days of the Course. The Coordinator will also provide information about the Chapter and RLI for display, such as cards, brochures and flyers. Electronic copies of RLI information pieces can be requested from RLI National.

*Note: The only collateral i.e. cards, brochures, flyers to be placed in the classrooms or on tables are those provided by RLI National, course sponsors, RLI Chapters/providers, and promotional material approved by National a minimum of fifteen days prior to the start of the course.*

2. On-Site Coordinator: A provider host should
  - Welcome participants/students and facilitate introductions of participants (if time allows)
  - Give a meaningful, brief introduction about the Chapter and RLI and the **Accredited Land Consultant (ALC)** designation using the script provided by RLI.
  - Introduce the Course and the instructor with information from his/her bio.
3. If an On-Site Coordinator cannot be available at the registration table throughout the entire course, the Coordinator needs to be available, at least, during the first two hours, during the breaks, during lunch, and at the end of class each day to respond to latecomers and questions.
1. On the final day of the course, the Instructor will administer the exam.
2. **Students should not keep copies of the exam.**
3. The Instructor grades the exams.
  - a. *Students must pass with a score of 70% or higher. If a student does not pass the exam with a score of 70% or higher on their first attempt, the instructor must provide the student with two additional attempts to earn a passing score on-site.*
4. Remind the participants that classes are added to the schedule throughout the year to contact RLI National if they have any questions about courses, membership, and/or the **Accredited Land Consultant (ALC)** designation.
5. The Coordinator must collect the graded exams from the instructor and completed evaluation forms to send to RLI National.

### **After the Course**

1. Within 5 days of the course the following information (course roster, graded exams, completed evaluation forms) must be sent electronically to RLI National at [amorrone@realtors.org](mailto:amorrone@realtors.org).
  - a. The course roster must be uploaded to the course listing in the Chapter portal of the database, by using the excel spreadsheet import template, and must include the following info::
    - i. First Name
    - ii. Last Name
    - iii. Company Name
    - iv. Email Address
    - v. Address
    - vi. City
    - vii. State
    - viii. Zip
    - ix. Phone Number
    - x. Exam Score
  - b. Scored student exam answer sheets  
***Note: 70% is the passing grade***

- c. Completed course evaluation forms from the students
- d. Upon receipt of the required documents, the Chapter will receive an invoice by email for the Course Royalty Fee. *The royalty is \$80 per Non-ALC student and \$40 per ALC student. The \$250 scheduling deposit will also be deducted from the overall total of the course royalty fee. The royalty fee can be paid by check or credit card.*

Send payment to:  
REALTORS® Land Institute  
Attention: Amanda Morrone  
430 N. Michigan Avenue  
Chicago, IL 60611

2. Upon receiving payment, RLI National will provide the Chapter an electronic file of the students' course completion certificates. It is the Chapter's responsibility to distribute the course certification certificates to the students.

### **Frequently Asked Questions (FAQs)**

1. What if the student does not pass the exam?  
*If a student does not pass the exam with a score of 70% or higher on their first attempt, the instructor must provide the student with two additional attempts to earn a passing score on-site. If the student does not pass the exam within that timeframe, he/she would need to retake the course.*
2. If the student has to leave the course for a few hours, does he/she still earn credit for having taken the course?  
*Students may leave the course for a total of two hours if a conflict occurs. Special circumstances must be approved by RLI prior to the course start. For CE credit, absences depends upon the rules of the State.*
3. How can I find out more about the ALC requirements?  
*Students can use the information distributed during the class to view the requirements. They may also visit the website at <http://www.rliland.com/alc-requirements>. They can also call RLI at 1.800.441.5263.*
4. What should be done with the copies of the course exams?  
*All exams and answer sheets should be sent to RLI National with the other post course required documents.*
5. Do the courses count for Continuing Education (CE) credit?  
*Since RLI National does not submit the courses for CE approval, students should submit this question to the organization that would be issuing the CE credits. The issuing body makes decisions on what is accepted for CE credits.*
6. Is there a time limit for the courses to count towards the ALC Designation?  
*No, at this time courses do not expire from a student's record.*

## Suggestions for Program Topics/Panel Discussions

1. Broker and salesman relations
2. Better office procedures and modern office equipment
3. How to appraise a farm or other types of land
4. How to go into escrow
5. How to make an exchange
6. Taxes and their effect on real estate sales
7. How to obtain better listings
8. Direct mail to obtain listings
9. Using the Internet to sell
10. New business from old clients
11. Negotiating the sale
12. Closing the sale
13. What to look for in selling a property
14. Real Estate Advertising
15. Problem properties
16. Sales contracts, options, etc.
17. Real estate syndication
18. How to conduct office sales meetings
19. Cooperation between REALTORS® in urban and agricultural areas
20. Office policy
21. Customer follow up
22. Creative listing
23. Multiple listing
24. Exchanging
25. Demonstration appraisals
26. Trade in plans
27. Highways and their effect on farm and transitional lands
28. Office location and its effect on sales
29. Use of open listings, land contracts, options, trust deeds
30. Financing
31. How to hire, train, and retain salesman

## Possible Sources of Speakers

1. Successful land developers and syndicators
2. City, regional and county developers
3. Chapter Departments of Development and Expansion Representatives
4. County Farm Advisors
5. County supervisors, council members, executives, planners
6. Chapter association officers
7. Chapter and local chamber of commerce president or officer

8. District Farmers Home Administration Officer
9. Representatives of the city governments
10. Banks, escrow and trust companies - presidents, managers, etc.
11. Representatives from the local Board of Education
12. Local executives of utility companies
13. Local or chapter bar association.
14. Chairpersons of local planning board
15. Members of local Toastmaster's Club
16. College and university professors from schools of agriculture, real estate, urban economics, etc.
17. Local military - public relations officers
18. Local attorney who is a specialist on taxes, estate, etc.
19. Chapter Real Estate Commissioner or Director of Licensing
20. Chapter Highway Department Real Estate Personnel
21. Chapter Parks and Recreation Director
22. Certified Appraiser
23. RLI accredited member on specialized land utilization.
24. President of a farm organization such as Farm Bureau, etc.
25. Speaker from US Department of Agriculture Extension Division
26. Housing and Urban Development (HUD) or Department of Commerce or Interior Official
27. Find speakers who need exposure or who are potential members.
28. Representative from Federal Bank in the area

## Chapter Program Budget Worksheet

EXPENSES:

Location/Room: \$ \_\_\_\_\_

AV equipment: \$ \_\_\_\_\_

Appetizers/Meals/Drinks: \$ \_\_\_\_\_

Speaker Fee/Honorarium: \$ \_\_\_\_\_

    Speaker Travel: \$ \_\_\_\_\_

    Speaker Hotel: \$ \_\_\_\_\_

Marketing/ Promotion Costs: \$ \_\_\_\_\_

Printing/Copying: \$ \_\_\_\_\_

RLI Royalties (if LANDU Course): \$ \_\_\_\_\_

**TOTAL EXPENSES:** \$ \_\_\_\_\_

REVENUE:

Sponsorship: \$ \_\_\_\_\_

Program Attendee Fee\*: \$ \_\_\_\_\_

Number of attendees needed  
to break even on expenses with revenue: # \_\_\_\_\_

**TOTAL REVENUE:** \$ \_\_\_\_\_

**Determining Chapter Program Attendee Fee:**

Adjust Program Attendee Fee (higher/lower) if necessary or solicit more sponsorships to lower cost of Program Attendee Fee.

\*Chapters are reminded to charge non-RLI members at least 25% more for chapter programs to show the value of RLI membership.

## Chapter Education Meeting Check Lists

### Setting up education meeting Check List:

- Select a topic and determine format (In-person, webinar etc.)
- Book an instructor/speaker (request approval from RLI if LANDU Course) and request speaker bio for introduction
- Reserve a meeting space and determine room set-up
- Develop registration process for students
- Develop a calendar of events to promote the meeting and courses
- Develop a brochure/flyer/email message to publicize the meeting
- Get any requests the speaker may have such as audio/visual, handouts, etc.
- Order all audio/visual equipment that is needed (don't forget a screen if you are bringing own projector), including flip charts, chalkboards etc.
- Give a final count of attendees if serving food/drinks at event
- Make arrangements to have drinks refreshed throughout the day
- Prepare a timed agenda for the education meeting

### Day of education meeting Check List:

- Give the speaker bio to the person making the introduction
- Make sure the room is set up correctly (check at least 1 hour prior to start)
- Let the hotel know if the number of attendees in the room has changed
- Give copies of timed agenda beforehand to officers, speakers and attendees
- Conduct on-site registration process for students. Check in, sign in, and provide agenda/handouts and meeting evaluation
- Remind attendees to fill out evaluations for the program

### After education meeting Check List:

- Collect evaluations for tabulation of results and give to Board for review and future program changes
- Collect tests and give to instructor for grading (if LANDU course)
- Send tabulated evaluation results to instructor and RLI (if LANDU course)
- Send Thank You notes to speakers/instructors and sponsors
- Pay any outstanding bills for the program (hotel, food etc., including Royalties to RLI)