



Chapter Leader Handbook

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I. Introduction

The REALTORS® Land Institute, provides the expertise, camaraderie, and resources that are the foundation for all land real estate professionals to become the best in the business.

The various structures of the organization, whether national, state or local, are designed to support members' business and career goals. The REALTORS® Land Institute and local RLI chapters are sustained through member dues and other types of non-dues revenue such as programmatic fees that provide education, property marketing and other business opportunities.

The *RLI Chapter Leader Handbook* is designed to assist those who lead RLI chapters to successfully support their members through the various chapter benefits and services. The *Handbook* provides a job description and a proven roadmap for success for chapter leaders and administrators giving chapter leaders the tools needed to lead and succeed.

While the focus of this *Handbook* is on chapter leadership, it can also be used as a resource by those organizing informal RLI marketing networks in areas not served by a local RLI chapter.

II. RLI Contact Information

RLI staff is always available to help you flourish in your chapter volunteer role and lead your chapter to success. If you have questions about the Chapter Leader Handbook, chapter operations, or RLI programs and resources, contact RLI staff at:

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III. RLI Overview

Purpose

RLI shall be the organization for REALTORS®, REALTOR-ASSOCIATES®, and other real estate professionals whose interests are related to our most precious resource: the land. RLI shall serve its members by providing the foundation for all land professionals to become the best in the business through world-class education, member services and benefits, and governmental advocacy for the preservation of private property rights.

Objective

The objectives of RLI shall be to bring together REALTORS®, REALTOR-ASSOCIATES® and other real estate professionals interested in the improvement of their professional competence in activities related to land including land brokerage, agribusiness, land management, planning and

development, appraising, acquisition, syndication, and any other land specialty areas and to make known to the public and real estate industry the following RLI specialty classifications of expertise:

- Farms and ranches
- Open tracts of land including recreational, timberland, and other resource lands
- Transitional and development land
- Subdivision and wholesale brokerage of lots
- Site selection and assemblage of land parcels

Directives

To achieve these objectives, RLI shall seek:

- To develop and establish professional standards of practice in land specialties through the education of our members and to identify these members to the public.
- To designate those members who have met rigid educational and experience requirements as "Accredited Land Consultants (ALCs)" of RLI and to identify these members to the public.
- To cooperate in the development of chapter and regional programs and to assist in their implementation.
- To formulate recommendations to the membership and to NAR for public policy affecting land.
- To advocate the wise use of the land and the reasonable rights and privileges of private ownership.

Mission: The REALTORS® Land Institute, "The Voice of Land," provides the expertise, camaraderie, and resources that are the foundation for all land real estate professionals to become *the best in the business*.

Vision: The REALTORS® Land Institute continually strives to maintain its status as the acknowledged leader for all matters pertaining to the land real estate profession. RLI endeavors to remain the essential membership organization for the extraordinary real estate professionals who broker, lease, sell, develop, and manage our most precious resource: the land.

Values:

- **Integrity:** We do the right thing in all situations, putting the best interest of our organization and membership above all else. We do what we say with the goal of earning trust and respect through keeping our word. Our stakeholders can be assured of RLI's character, abilities, and viability through our actions. Together, our leadership, staff, and members create a transparent environment where trust flourishes.
- **Commitment:** We are committed to and will do whatever it takes to achieve our vision of being "The Voice of the Land" for land agents and landowners. We are devoted to the land industry, those we serve, and to the stewardship of the land.
- **Excellence:** We always strive for the highest standards in everything we endeavor. We aspire to understand and consistently exceed the expectations of our membership. We provide a competitive advantage to our members by providing excellent service and resources that enhance the level of excellence our members can achieve.
- **Collaboration:** We create a competitive advantage for our members by the relationships and networking we foster. We continually work together with our members, our partners, and internally to achieve our mission and vision. We seek and value collective wisdom to create an environment that encourages camaraderie.

- Expertise: RLI and its members are the most knowledgeable resources in the industry on all matters pertaining to land real estate and the land market. We are committed to continuous learning and keeping up with industry trends to help us best serve our members so they can best serve their clients. We validate ourselves as “The Voice of the Land” by our knowledge and expertise that we share with the industry.
- Innovation: We want to be forward thinking. Seeking new opportunities to be the best at bringing value to our members and the industry. We will strive to innovate to bring positive change for RLI, our members, and the Land. We want to use innovation to adapt to our changing world and the changing needs of our members.

IV. RLI Chapters

Commitment and dedication describe RLI’s Chapter organizations. The REALTORS® Land Institute enjoys strong and active chapter programs because of the superior commitment and dedication of its volunteers. RLI chapters routinely sponsor LANDU courses, as well as an array of professional development programs and special events.

Members of RLI can elect to join one or more chapter organizations and benefit from participation on a regional or local basis. Members must be in good standing with national to elect chapter membership.

With 19 chapters across the US, you are able to connect and exchange information and ideas about what’s happening in the industry. It’s an invaluable tool for knowledge building, leadership opportunities and networking alike. Getting involved in your local chapter is a great way to:

- Quickly integrate and network with local land experts
- Connect with local business resources
- Expand your conceptual, planning, and execution skills through local event management and meetings
- Expand your management, leadership, and public speaking skills by volunteering to become a chapter leader

THE RLI CHAPTER: WHAT IT IS AND HOW IT WORKS

How the RLI Chapter is and is not like your business

1. Non-profit Association:
 - a. “Non-profit” means that profits are not distributed to members, the way they are distributed to partners and shareholders in a for-profit business.
 - b. Non-profit does not mean “no profit”. If your Chapter is going to continue to offer the benefits and services that members need, it REQUIRES both dues and non-dues income.
2. Why volunteers?
 - a. One of the unique features of the United States has always been that citizens are able to voluntarily gather together to achieve a common good. Volunteering is central to the American way of life and is almost unique throughout the world.
 - b. Volunteer involvement ensures the right focus. It takes members to identify and make decisions about member needs and the best ways to meet them.

- c. A knowledge-based Chapter depends on volunteers who bring that knowledge to the table.
 - d. Volunteers form a no-cost workforce to achieve a common goal cost effectively, especially in the absence of paid staff.
3. Accountability:
- a. Volunteer doesn't mean unaccountable – it means freely contributed time and energy to achieve the outcomes that are best for the members. The responsibilities for meeting commitments and accountability for producing results are no less important to your Chapter's success than they are to your business success.
4. Reality:
- a. Vision needs to be realistic otherwise it is delusion – sometimes there is a thin line between the two! The fact is you can never have all you want. So you'll need to:
 - i. Decide what is realistic.
 - ii. Prioritize desired outcomes and select ones you must and can afford to do.
 - iii. Ensure there are sufficient resources, both financial and personnel.
 - iv. Find the fastest, most cost-effective way to achieve the highest quality results.
 - v. Remember that "Not now" doesn't have to mean "Not Ever"; tuck those good ideas whose time hasn't yet come into a follow-up system and pull them out for reconsideration each time you do planning.

V. Chapter Overview and Organizational Structure

As part of a North American association, your chapter's operations and policies must be consistent with those of RLI as well as local, state, and federal laws. RLI's ruling documents are its Bylaws and Governance Policy Manual. Individual chapter bylaws must not conflict with these documents. RLI has model chapter bylaws which are a great resource to ensure your chapter bylaws align. Should you find that your chapter bylaws are in conflict with RLI's, you should take immediate steps to revise your chapter's bylaws.

RLI has created the below set of operating standards to help guide its chapters:

- The RLI and Chapter Agreement outlining the responsibilities of RLI and the Chapter to serve the membership of RLI
- Be formally authorized by the RLI Board of Directors.
- Request an EIN from the IRS:
 - You can apply for an EIN on-line, over the telephone, via fax or through the mail. See the [instructions](#) for Form SS-4, *Application for Employer I.D. Number*, for further details.
 - To apply on-line, use the [on-line EIN application](#) available on this website.
 - To get an EIN over the IRS's toll-free telephone number, call (800) 829-4933. See [EIN Toll-Free Telephone Service](#) for more information.
 - To request an EIN via fax, 24 hours a day / 7 days a week, dial the fax number at the location accepting applications from your state. The instructions on the Form SS-4 indicate which location will accept your faxed request.
 - To receive an EIN through the mail, complete [Form SS-4](#) . The [instructions](#) for the form provide the correct address.

- Be separately incorporated and file for 501(c)(6) tax-exempt status by filing a [Form 1024](#) with the IRS and file appropriate documents and returns (*Information in this guide is not to be construed as recommending any course of action regarding financial, legal, or accounting matters. Chapters should seek professional counsel on these matters*).
- File with the Secretary of State for Articles of Incorporation: every state is different, so check with your state government website for more information.
- Maintain chapter bylaws in compliance with the RLI's bylaws (RLI Model Chapter Bylaws available).
- Conduct annual elections and maintain a minimum of President, President-Elect, Secretary, and Treasurer (or Secretary/Treasurer combined). It is strongly encouraged to also have a chapter administrator if at all possible.
- Ensure that all chapter members are members in good standing of RLI.
- The chapter President and/or President-Elect (or if they are not available, any chapter leader) must attend the annual RLI-sponsored Chapter Leadership Session at the NLC meeting each year.
- The chapter is identified as "RLI (State or Region Name) Chapter". This identification should be used in all official communications and literature.
- Adhere to and support RLI's policies related to the course provider agreements, visual standards, membership, and related activities.

VI. Chapter Board

All chapters must have a minimum of President, President-Elect, Secretary, and Treasurer (or Secretary/Treasurer combined). This group of leaders represent the Chapter Board. Additionally, it is highly recommended that each chapter also have a chapter administrator. Many successful chapters have stated that this position allows them to focus on big picture chapter programs that elevate the chapter with its members, while allowing the chapter administrator to focus on day to day operations and compliance.

The members of a Chapter Board of Directors serve as the core leaders of the organization.

The successful Chapter Board of Directors has 2 roles

1. Board as **Leader**.
 - a. The Board provides vision: crafts and communicates it in such a way that members understand it and choose to share in it.
 - b. The Board provides direction: defines the desired outcomes (goals) and selects the best strategies to produce them.
 - c. The Board prioritizes: you can't do everything so the Board selects the most important programs from all the available options and allocates the resources needed to accomplish them.
 - d. The Board is accountable: for its own outcomes and those of other Chapter Committees, taskforces, and other governing units

In summary, the Board as Leader determines:

- What outcomes are needed most
- The best strategies to achieve them
- The timing for implementing them
- The most effective allocation of available resources to make it happen

2. Board as *Caretaker*.

The Board has a fiduciary responsibility to manage operations for the well-being of the organization. Remember, a Board's fiduciary accountability goes beyond the financial to include due diligence in decision making, safeguarding the Chapter's tangible and intangible assets including its image, reputation and service-value to its members.

Successful Boards are accountable for four (4) governance activities

1. Successful Boards Scan:

- a. They practice knowledge-based decision making by relying less on opinion and anecdotal evidence and more on researched facts because "sometimes what you know, just isn't so."
- b. The successful Board regularly tests Board member assumptions with unbiased research to validate beliefs about:
 - i. The professional landscape,
 - ii. The organization's members;
 - iii. Member needs, opinions and expectations.

2. Successful Boards Plan according to the 10-3-1 Principle:

- a. Mission is what drives the organization and generates Vision.
- b. Vision is what the Board wants the organization to look like in 10 years. Vision creates a picture of what the members want their professional world to look like in the next decade, which provides the focus for this decade's efforts to make that picture a reality.
- c. Goals are the Board's clearly articulated, measurable outcomes for the next 3 years.
- d. Strategies are the programs, services and initiatives we will undertake to produce those outcomes during the next 3 years.
- e. Prioritize strategies – this is what drives the decisions about which strategies are most time critical, have the greatest impact on achieving our goals and deserve the most resources. In prioritizing, it is often better to do one "great thing" with significant impact than many less consequential things.
- f. The successful Board develops an annual operating plan and budget for the next year that is driven by strategic decisions and priorities. Remember, the programs are the strategies that achieve the outcomes and how they are prioritized should determine which programs would be funded.

3. Successful Boards Monitor

- a. Rather than monitoring how a Chapter program or activity is being implemented or managed, Boards should ask: "are we producing results?" The focus needs to be on outcomes, not the process!
- b. The primary monitoring role of the successful Board is to monitor progress against attaining the desired outcomes. Monitoring the process is of secondary importance, receiving attention only as one of several possible causes when desired outcomes aren't being achieved.

4. Successful Boards Adjust

- a. Dynamically, throughout the year, using quarterly reviews to assess progress in attaining the desired outcomes.
- b. Change strategies that aren't working: sometimes strategies don't play out as expected. If that's the case, make the appropriate adjustments:
 - i. Adjust the strategy – try another approach

- ii. Adjust priorities to accommodate new situations and circumstances.
- iii. Adjust budgets to accommodate strategic and priority changes.
- iv. Adjust workforce resources by shifting volunteer or staff roles and the number of workers needed to accomplish the outcome.
- v. If repeated adjustments are still unsuccessful, sunset what can't be fixed, take what you've learned and move on.

VII. Chapter Board Position Duties

President

The President is not the one who implements the plan but is the one who gets others focused on it. Successful presidents:

- Look to the future – beyond their own year in office.
- Keep everyone focused on the plan.
- Appoint for success first, rewards second.
- Carry the torch to influence and inspire members to achieve the organization's goals.
- Hold governing bodies accountable for achieving outcomes: the Board, committees and workgroups.
- Monitor volunteer performance against the desired outcomes.
- Take action when volunteers aren't meeting their organizational commitments.

The President:

- Is the main point of contact for the chapter and is accountable for the functioning of the chapter
- Decides on officer duties and the chapter's organizational chart
- Develops chapter committees and identifies responsibilities. Appoints committee chair persons, such as nominating, membership development, professional development/education, budget, and public relations/promotion, according to the chapter's Bylaws
- Plans yearly event and meeting calendar
- Delegates and follows up on status of assigned tasks
- Presides at chapter meetings
- Serves as head of the chapter's Executive Committee and ex-officio on all committees
- Follows up with chapter members who have chosen not to renew membership and reenrolls
- Attends national RLI events; informs chapter members of what was covered at these meetings and makes sure appropriate actions are taken
- Participates in chapter leadership training opportunities
- Promotes professional development to members
- Attends all state conventions and chapter Board of Directors meetings
- Completes appropriate state and tax forms for the chapter
- Signs and returns the RLI Course Provider Agreement to RLI National (if applicable)
- Responds to chapter requests from RLI National and is accountable for daily operations

President-Elect

The time of being President-elect is a time of learning and moving things along behind the scenes. It is not a period of inactivity until the current president's term of office is over!

1. The successful president-elect: Doesn't wait until stepping up to chapter presidency to get their administration started. The president-elect's term is the time to participate in developing the chapter's plan for their presidential year. The best practice is to participate in scanning and planning to place the president-elect's own desired outcomes for their Presidential year on the table for consideration and prioritization along with all other possibilities.
2. The successful president-elect: Is a partner to the president and fellow Board members, actively involved with governance through chapter committees and workgroups.
3. The successful president-elect: Starts building a sound working relationship of reciprocal advice and support with the Chapter's executive director or primary staff support. In that way, when they assume the Presidency there is a seamless transition built on an existing partnership of mutual confidence and support.
4. With an eye to the future, the president-elect learns the RLI organization from top to bottom:
 - a. Attending the Chapter Leadership session at the National Land Conference prepares the president-elect to step up to presidency and to represent the Chapter and its needs to RLI National.
 - b. Developing a working relationship with the RLI National president-elect will ensure that the relationship continues when you both move up to presidency.
 - c. Becoming familiar with RLI National staff and their roles will come in handy to make sure the Chapter is involved in the total organization and for enlisting the assistance of RLI staff.

Typically, the President-Elect:

- Assumes responsibilities of the President in the event he/she is unable to perform those responsibilities
- Attends all committee meetings of the chapter
- Assists the President as delegated
- Prepares to take over as president in the upcoming year
- May serve (or have served) as a Committee Chair to ensure strong leadership transitioning

Secretary

- Becomes an expert in the chapter bylaws and supplies copies to all new members and/or posts them on the chapter web site
- Keeps minutes of chapter and board/executive committee meetings

Treasurer

- Balances and keeps chapter checkbook and financial records
- Keeps copies of banking statements/documents related to the account
- Prepares and mails annual dues notices when applicable and contacts members delinquent on dues payments
- Changes bank signature cards when appropriate
- Keeps copies of meeting contracts and/or work orders

Chapter Administrator

- Administers chapter elections and advises RLI National of the results. Elections should be completed by September 15 of each year so that the leadership transition can take place in tandem with the transition of RLI National's leadership team.
- Inputs upcoming chapter courses into the online system and follows RLI National's course provider policies and procedures.
- Notifies RLI National of upcoming chapter events and/or member news
- Updates all online presence of the chapter including any websites and social media
- Manages the day to day administration of the chapter
- Ensures annual legal filings/tax forms are filed for chapter to remain legally compliant

VIII. RLI Chapter Leadership Council

The Council shall be made up of Chair, Vice Chair, and a maximum on nine total council members, with at least one being a Chapter Administrator. The Council will meet in person at the National Land Conference with additional teleconferences throughout the year.

Purpose: To empower chapter leaders to deliver value, engage professionals, enhance the overall RLI member experience, and work with RLI National to ensure chapter success. To do this, the CLC provides mentorship to chapter leadership, monitors chapter performance, and designs and maintains resources and tools for chapter leaders and assists each chapter in raising awareness of the unique characteristics of their region. The CLC facilitates RLI's chapter development strategic plan and leads comprehensive initiatives such as leadership training for chapter leaders and the Chapter Awards program.

Responsibilities:

- Provide a direct line of communication from chapter leadership to the RLI National leadership team and Board of Directors
- Raise awareness of national initiatives and how chapters can take advantage of such initiatives
- Raise awareness of the objectives of RLI's Strategic Plan and how to implement those when devising their own organizational plans
- Provide a forum for chapter leaders to share best practices
- Grow and build the chapter function of the national organization
- Select the recipient of the Outstanding Chapter Award, given on an annual basis
- Help coordinate the Chapter session at the National Land Conference
- Create and/or revise chapter policies as needed

IX. Chapter Start-Up Procedures

RLI is always excited to see the formation of new chapters of the organization. Strong chapter organizations provide a valuable member benefit, by offering LANDU courses, creating opportunities for local networking, and increasing awareness of the Accredited Land Consultant (ALC) designation and the land profession. The bylaws of the chapters must be in line and approved by RLI. All members of chapters are required to be members of RLI. Also, see section V. Chapter Overview and Organizational Structure (page 6).

A one-page document detailing steps to start up a chapter can be found in the Appendix.

X. Chapter Bylaws

All chapters must adopt an official set of bylaws which need to be in line with the RLI National bylaws. The board has created a set of [model chapter bylaws](#) for each chapter to implement. Each Chapter may elect to amend these model bylaws based on their particular needs, as long as the amendments do not conflict with the bylaws and policies of the REALTORS® Land Institute or the National Association of REALTORS®. All amendments must be approved by both the Chapter Board of Directors and the RLI Board of Directors before they are final.

XI. RLI Membership

Only active members of RLI may be active members of chapters. Members are not required to be a member of a chapter (there are not chapters in every state), and members may choose to belong to more than one chapter to expand their regional connections.

Chapters should be aware of the formal membership categories of RLI. The following membership categories currently exist:

Accredited Land Consultant

Accredited Members are members who have satisfactorily completed all the requirements of RLI's candidacy program and who have been awarded the right to use the Accredited Land Consultant (ALC) Designation by fulfilling all professional competence requirements as established by the Board of Directors. Accredited Members must hold a category of membership as a REALTOR® or REALTOR-ASSOCIATE® member of the National Association, or hold an Institute Affiliate membership in a member Board/Association. Accredited Members may vote and hold office and may retain their accreditation as long as their REALTORS® Land Institute membership is maintained. These members qualify for Accredited Member-level member benefits.

Institute Members

Institute Members are RLI members who have not yet achieved the ALC designation. They may vote and hold office only if they hold a category of membership as a REALTOR® or a REALTOR ASSOCIATE® member of NAR, or hold Institute Affiliate membership in a member Board/Association. Institute members retain their candidacy status and all coursework credit earned toward the ALC designation as long as their membership in the organization is maintained. These members qualify for Institute Member-level member benefits and do not fall into any of the other Non-Accredited Member categories.

Military Transition Program Members

Military Transition Program (MTP) members are those members eligible for a one-year RLI program designed to assist transitioning service members into the land real estate industry. The program is available to veterans who transitioned out of the military within the last five years and are now looking to build or enhance a career in the land business. The program offers unparalleled networking and camaraderie among land professionals as well as the ability to learn from fellow members' knowledge and years of experience to gain competence and confidence as a land professional.

Associate Members

REALTORS® Land Institute Associate Members are industry service providers, partners, and other non-real estate professionals who are engaged in endeavors related to the objectives of RLI but who do not aspire to hold the Accredited Land Consultant (ALC) designation. Associate members may include, but are not limited to, the following: real estate-related professionals who do not have a real estate license, government and non-profit employees, students, and professors. They may not vote

or hold office and are not required to hold a category of membership in NAR. As a benefit, associate members gain access to over 1,300 land real estate professionals looking for services to build their business, are allowed to participate in the Member Advantage Program brings your company promotion to all members, and receive member rates on education and event registrations.

Student Members

Student members are those individuals attending high school or an institution of higher education, who are not licensed as real estate practitioners, and who are interested in the land specialty and real estate profession. They may not vote or hold office and are not required to hold membership in NAR.

Non-Producing Members

Non-Producing Members shall be either accredited or non-accredited members who are no longer actively selling real estate but still desire to maintain membership in RLI. To qualify for non-producing membership status, members must show proof of having an inactive real estate license from their state's real estate commission.

Emeritus Members

Emeritus Members are members who have made outstanding contributions of personal time and effort to the Institute at the national or chapter level, have had continuous membership in RLI for at least twenty years, and who are at least seventy years of age. Emeritus Members have voting privileges and are entitled to receive all services and benefits provided through an RLI membership. Emeritus Members are not required to pay any national annual dues. To apply for Emeritus status, all requirements must be met and a letter of intent must be submitted to the Board of Directors.

XII. Chapter Membership

There shall be two categories of membership: accredited members and non-accredited members. Accredited Members shall be those members that have satisfactorily completed all requirements of RLI National's candidacy program and have been awarded the right to use the "Accredited Land Consultant (ALC)" designation by RLI National. They may vote and hold office. Further, Accredited Members must:

- a. Maintain active membership in RLI National.
- b. Abide by the Code of Ethics of the National Association of REALTORS®, and the rules, regulations, and Bylaws of this Chapter and of RLI National.
- c. Be REALTORS® or REALTOR-ASSOCIATE® members of the National Association, or hold Institute Affiliate membership in a member board/association.

Non-accredited members shall be those members who have not yet achieved the ALC designation. Non-accredited members include the following:

- a. Institute Members shall be RLI members who have not yet achieved the ALC Designation. They may vote and hold office only if they hold a category of membership as a REALTOR® or a REALTOR ASSOCIATE® member of NAR, or hold Institute Affiliate membership in a member Board/Association. Institute members retain their candidacy status and all coursework credit earned toward the ALC designation as long as their membership in the Institute organization is maintained. They must:
 - i. Maintain active membership in National RLI.
 - ii. Abide by the Code of Ethics of the National Association of REALTORS®, and the rules and regulations and Bylaws of this Chapter and National RLI.

Here are some ideas to help grow your membership:

- i. Request membership materials from RLI National and distribute at local meetings and events
- ii. Ask the state and local associations of REALTORS in your region to help promote courses and membership meetings
- iii. Make individual outreach efforts through mail, email, phone, or social media to land professionals in the chapter's marketplace
- iv. Write articles on the land business and reference the Chapter organization
- v. Run advertisements in local or regional print and electronic communications
- vi. Create and distribute a Chapter membership directory
- vii. Hold marketing sessions and related programs
- viii. Partner with other chapter or regional organizations
- ix. Send welcome back and welcome "aboard" letters
- x. Invite potential members to meetings
- xi. Create a "refer-a-member" program
- xii. Host a quarterly lunch meeting and invite local subject matter experts to speak to your membership
- xiii. Host an RLI course

XIII. Chapter Publicity

Keeping Fully Informed

1. Keep the region fully informed as to the activities of the Institute and the chapter in particular. Send newsworthy material to the press and local magazines and obtain suitable recognition of and understanding for the chapter's operations and activities.
2. Send pictures of chapter events and other newsworthy information to be included in the LandNews e-newsletter or monthly Chapter e-connections.
3. Seek the assistance of the local boards or chapter association to promote chapter events and activities. Remember you can help each other.

Public Relations

1. Good Public Relations include participation in community events such as:
 - a. Service club activities - Lions, Optimists, Kiwanis, etc.
 - b. Talks before service clubs, farm groups, investors, builders, etc.
 - c. Water committees - storm drainage committees
 - d. Builders and trade committees
 - e. Planning committees - subdivision development
 - f. Active participation in the local board and chapter association functions.
 - g. Participation in national meetings.
2. Represent the land real estate industry at meetings considering:
 - a. Water and air pollution problems
 - b. Wildlife and parks
 - c. Highway construction
 - d. Redevelopment
3. Recognize honorary directors:
 - a. Local government planning director
 - b. City mayor or manager

- c. Outstanding citizen
4. Who to send PR release to:
 - a. Local newspapers
 - b. Chapter association bulletin or magazine
 - c. Chapter newsletter or magazine
 - d. State Association newsletter/magazine
 - e. REALTOR® Magazine
 - f. RLI Land News Newsletter
 - g. Publications or Trade Journals - from such organizations as:
 - i. Builders Unions
 - ii. Chambers of Commerce School papers

XIV. Visual Standards Guidelines

Ensuring that our brand remains clear, concise, and consistent is essential to maintaining the integrity of our brand and organization as a whole. The purpose of the Visual Standards Guidelines Manual is to provide our community with the visual guidelines for appropriately conveying the REALTORS® Land Institute brand. Through implementation across our platforms and membership, we will build a stronger brand that benefits all using it

All chapters are provided with logo marks for their specific chapters and should use these logo marks in accordance with the guidelines of the official [Visual Standards Guidelines Manual](#).

RLI National expects its Chapter leaders and administrators to help us monitor and protect our official logos. If you see someone using the wrong logos or using the logos inappropriately, please either remind them of the proper logo usage or notify RLI National.

XV. RLI Chapter Websites

REALTORS® Land Institute offers chapter websites that are designed to make it easier for RLI chapters to manage their members and courses while providing a standardized look that will strengthen the RLI brand in the industry. With a simple to use interface that integrates with the RLI National database, chapters will have easy access to more information than ever before. Chapters will also be able to more easily manage and update their own websites.

The cost of the initial website setup is a one-time fee of \$250. Afterwards, chapters will be responsible for paying a monthly maintenance fee of \$30 which includes their annual domain fee, website updates, and maintenance. All payments will need to be made to LandBrokerWebsites.com, not RLI National. Chapters will continue to be responsible for managing their own finances and all fees associated with payment processing. More detail can be found in the Chapter Website Proposal and Agreement in the Appendix.

The Chapter Website Manual can be found on the Chapter Resource Center page on RLI's website and goes into detail on how to update the site and how to manage the database.

XVI. Social Media

- Creating a Social Media Presence for Your Chapter, How to Set-Up Accounts on Social Media
 - Facebook: <http://www.socialmediaexaminer.com/facebook-page-for-business/>

- LinkedIn: <http://www.socialmediaexaminer.com/create-a-linkedin-company-page-to-promote-your-business/>
- Instagram: <https://www.outboundengine.com/blog/how-to-set-up-an-instagram-business-account/>
- Twitter: <https://www.outboundengine.com/blog/how-to-set-up-an-instagram-business-account/>
- Social Media Best Practices in General: <https://moz.com/beginners-guide-to-social-media/best-practices>
- Social Media Best Practices for REALTORS®
 - <https://blog.wishpond.com/post/58926524787/social-media-for-real-estate-agents-21-tips>
 - <http://rismedia.com/2016/06/14/a-social-media-cheat-sheet-for-realtors/>
- Social Media Best Practices for Non-Profits: <https://www.dunhamandcompany.com/2015/11/15-social-media-best-practices-for-nonprofits/>
- Branding
 - Make sure to use your approved chapter logo and follow the [Visual Standards Guidelines](#) on all social media pages
- Make sure you follow RLI's social media pages and posts so that you can repost those on your own outlets

XVII. Dues, Budget, and Finances

Chapter dues are not required, but if a chapter does have dues, they are billed by and payable to the chapter of RLI. Dues are established by the chapter Board of Directors and shall be payable in advance. The amount of dues may vary based upon the class of membership and the status of the member. Said Dues are to be used to defray the operational expenses of the chapter and shall be in addition to any dues paid to other local, state or National organizations.

The Board of Directors shall administer the finances of the chapter. An annual operational budget for the fiscal year shall be prepared and submitted to the Chapter Board of Directors for approval. From time to time, supplements to the budget for the current fiscal year may be submitted to the Board for approval; however, under no circumstance shall the Board of Directors incur any non-budgeted obligation in excess of 10% over the available cash on hand without the approval of a majority vote of the chapter members.

Below are some common guidelines for the chapter budgets:

1. An audit of the chapter accounts are completed by the end of the calendar year for the prior year. One Past President and two members at large serve as the Chapter Audit Committee with assistance from the Treasurer.
2. When possible, each chapter builds a reserve account equal to the annual operating budget of the chapter. The chapters keep these funds in interest bearing accounts or in certificates. The reserve fund is reserved for chapter program deficits or an income transition resource.
3. In preparation of the budget, an amount of five to ten percent is designated as a contingency account to off-set planning deficits.

XVIII. Chapter Resource Center Page

The Chapter Resource Center page is where RLI houses important deadlines and resources that are important in running your chapter. This is where you go if you need certain guidelines, forms, templates, dates, webinars, and any other tools that RLI provides to chapter leaders. If you are looking for something, check there first. If you can't find it, contact RLI Staff.

XIX. Chapter e-Connections Newsletter

The last Thursday of every month, RLI sends out a chapter newsletter via email to all chapter leaders. This newsletter has important updates, deadlines, chapter recognition, bright ideas, and important resources to help you run a successful chapter.

XX. Education

Whether aspiring to the prestigious ALC Designation or simply desiring to learn more about the land real estate business, RLI's LANDU Education program is the industry-leading resource for top-notch education courses and webinars on one of the most unique real estate specialties: the land.

Course Provider Agreements: chapters are extended the opportunity to become official "Course Providers" for RLI's LANDU courses. Chapters that elect to act as course providers must review, sign, and adhere to the official Course Provider Agreement for each course. Chapters may also elect to collaborate with other regionally connected chapters or other state and local associations to offer LANDU programs.

RLI's Chapter LANDU Course Provider Policies and Procedures can be found in the Chapter Education Handbook.

XXI. Outstanding Chapter Award

The award recognizes chapters for innovative programming and raising the bar on chapter activities. An award plaque is presented to the Outstanding Chapter at the RLI Land Conference during the awards luncheon.

XXII. RLI Chapter Leaders

Volunteers like you are crucial to the success of RLI and we believe in the importance of recognition and appreciation of volunteers for all they do. In 2016, RLI developed the following Statement of Beliefs reflecting the importance of volunteers to the organization:

Statement of Beliefs

Volunteers represent a key strategic asset of RLI:

- They provide an integral role in guiding the content deliverables to the membership.
- Their land experience allows RLI content to be current and relevant to the various constituencies.
- The work that they do on behalf of RLI allows far broader and deeper support to the membership than would otherwise be possible.

In recognition of the importance of Volunteers to the organization, RLI will:

- Treat our volunteers as partners.
- Support our volunteers with appropriate resources.
- Respond to their requests thoroughly and in a timely manner.
- Truly appreciate the work that they do on behalf of RLI.
- Acknowledge the contributions that they have made to the organization.
- Thank them sincerely for their efforts.

We truly value all that you do for RLI as leaders of your chapters. Thank you.

XXIII. Important Dates

- Early November (day after the NAR Board of Directors meeting at the NAR Annual Conference and Expo): Incoming National RLI Leadership take office
- December 1: NLC early bird registration deadline
- December 31: Fiscal year ends
- January 1: New fiscal year starts
- February/March: National Land Conference
- June: LANDU Education Week
- June: Nominations open for RLI Board of Directors (BOD)
- August: BOD Slate of Candidates announced to membership
- September: first 10 business days – RLI National Board of Directors election
- October 1: National Land Conference Registration opens

Appendix



Chapter Start-Ups Steps

The REALTORS® Land Institute is always excited to see the formation of new chapters of the organization. Strong chapter organizations provide a valuable member benefit, by offering LANDU courses, creating opportunities for local networking, and increasing awareness of the **Accredited Land Consultant (ALC)** designation and the land profession. The bylaws of the chapters must be in line and approved by the National organization. All members of chapters are required to be members of the National organization.

The following is checklist of activities for chapter startups or for re-establishing chapters:

1. Let the National REALTORS® Land Institute know that you are starting a chapter organization. The National office will provide you with a list of current members in your state and will provide updated new member lists on an on-going basis. **Only members of RLI National can be members of chapters, and members can choose to belong to more than one chapter.**
2. Consider hiring an accountant or attorney to assist with forming a legal incorporated entity. Incorporation is recommended for all chapters since this structure protects officers and directors from personal liability and allows the chapter coverage under NAR's insurance program.
3. File for 501(c)(6) tax-exempt status. Obtaining 501(c)(6) status should minimize a chapter's tax burden. Chapters file for tax-exempt status by filing a [Form 1024](#) with the IRS. Once approved, the IRS will issue a determination letter to the filing entity. And of course, chapters need to file taxes.
4. Request an EIN (Employer Identification Number) from the IRS (see the Chapter Leader Handbook Section 5. Chapter Overview and Organizational Structure for details).
5. Create Chapter Bylaws. The RLI National has Model Chapter Bylaws available (in Chapter Resource Center) that should be used to "jump start" the formation of a chapter. All bylaws must be in line with RLI's bylaws and approved by RLI National.
6. Sign a RLI and Chapter Agreement which define the relationship between the two parties and their responsibilities.
7. Adopt governance documents. The National Institute can provide model documents for a Conflict of Interest Policy, a Whistleblower Policy, a Confidentiality Policy, and a Records Retention Policy.
8. Elect officers and notify National of the results.
9. Develop a chapter operating plan accordingly. Consider the development of a chapter dues structure, but note that not all Institute chapters require dues payments.
10. Determine source of administration support. Some chapters hire administrative support, some depend on all volunteer support, and others partner with a local or state association for administrative support. All administrators should follow RLI National policies which will be provided to the chapters.
11. The names and contact information of all leadership and administrators of the chapters are to be sent to RLI National as soon as they are in place.
12. Send news announcement to all state and local associations that the new chapter has formed and conduct personal outreach to appropriate organizations in your state. Establishing relationships with like-minded organizations can expand opportunities.
13. Become familiar with the organizational mission and Strategic Plan of the National organization so that chapter programs and services align with the National goals.
14. Contact other Institute chapter presidents to discuss "lessons learned" and best practices. In addition, begin participation in chapter meetings and related meetings and conference calls



RLI Chapter Websites Agreement

Prepared for: RLI Chapters

GOALS & OBJECTIVES

The new REALTORS® Land Institute Chapter Websites are designed to make it easier for RLI Chapters to manage their members and courses while providing a standardized look that will strengthen the RLI brand in the industry. With a simple to use interface that integrates with the RLI National database, chapters will have easy access to more information than ever before. Chapters will also be able to more easily manage and update their own websites.

DEFINITIONS

- **Frontend**
Refers to the part of the website that users see when they visit your website page.
- **Backend**
Refers to the part of the website only approved admins and leadership (Website Administrators) may see which integrates with the RLI National Database.

WEBSITE FRONTEND INCLUDES: (Stage 1 – Purchased Option)

- An intuitive, easy to navigate WordPress website template which comes pre-populated to include the new RLI brand elements and color scheme.
- A standardized, branded website URL domain (i.e. www.rlitexaschapter.com).
- A Chapter Land Connections listing page with properties from only your chapter members.
- A Chapter Find A Land Consultant page with a directory of only your chapter members.
- An automatically updating 'Upcoming Courses' Page with your chapters courses.
- Ability for your members to login to register for courses, renew their dues, and update their member records.
- A 'Welcome New Chapter Members' page and a 'Congratulations new ALCs' page that automatically update.
- An intuitive WordPress website template editor which is easy to update with custom content and images.

WEBSITE BACKEND INCLUDES:

(Stage 2 – Available to all Chapters at no cost)

- An e-commerce system that allows chapters to take payments through registration and renewal forms on the website OR the ability to use a payment processor of your choice outside the system (not included if not purchasing Stage 1).

- **Education Management**
 - + Submit to host courses to RLI National through a form, for approval by National.
 - + Manage course rosters that connect to a member's record eliminating the need to submit Excel rosters to National.
 - + Add/specify an additional charge to a course if registrant is taking it for CE credit.

- **Membership Management**
 - + Ability to email to a list of chapter members through the database.
 - + Ability to add custom fields to your chapter members' records.
 - + Ability to view and update contact information in a chapter member's national record.
 - + Ability to view a chapter member's course history.
 - + Ability to export lists of your chapter members as well as new national members and prospects from the RLI National database in your Chapter Region.
 - + Ability to set up dues rates and payments by membership level/type.
 - + Ability to add a prospect record to the National database.

- **Chapter Management**
 - + Ability to access National's templates and resources available through RLI national at any time (i.e. PPT, brochure, flyer, e-newsletter, etc.)
 - + National's promotional flyers and membership applications.
 - + Data forms, evaluations, and other course related documents.

PROCESS AND TIMELINE

A Chapter may purchase a website at any time.

Step 1: Sign this document agreeing that you understand and intend to transition to the new RLI Chapter Website. Make initial payment to LandBrokerWebsites.com.

Step 2: Front-end customization. Chapters will be given access to the template editing side of the site where they can update copy and images to customize the page before it goes live. [A recorded video](#) on how to use the different functionalities on the frontend of the website is available online on the Chapter Resource Center page..

Step 3: Backend integration. The backend functionality will be automatically added for you, if it is not already installed. [A recorded video](#) on how to customize the backend of your new website is available online on the Chapter Resource Center page.

INVESTMENT OVERVIEW

The cost of the initial website setup is a one-time fee of \$250. Afterwards, Chapters will be responsible for paying a monthly maintenance fee of \$30 which includes their annual domain fee, website updates, and maintenance. All payments will need to be made to LandBrokerWebsites.com, not RLI National. Chapters will continue to be responsible for managing their own finances and all fees associated with payment processing.

** If located in Texas and you are not a non-profit organization, 100% of the project cost is taxable under Texas State Sales Tax, 8.25%

NEXT STEPS

1. Sign this agreement and return to RLI National
2. Submit \$250 payment to LandBrokerWebsites.com through the following payment link: <https://crystalcore.net/rli-chapter-payment>
3. Upon initial payment, crystalcore.net will begin initial project scheduling and creation of a production timeline.

FAQS

- **What support will I have for my website?**
RLI's Marketing Manager will be the first line of support for Chapters to answer questions about the website. Should further assistance be needed, the issue will be escalated to be taken care of by LandBrokerWebsites.com
- **What parts of the website will I need to update?**
All updates to content, images, courses, and member records will be the responsibility of the chapter. All updates to the functionality and maintenance of the website will be the responsibility of LandBrokerWebsites.com

TERMS AND CONDITIONS

- Once the project fee is paid in full to LandBrokerWebsites.com, any elements of text, graphics, photos, contents, trademarks, or other design artwork furnished by the chapter for inclusion in the website are owned by the client.
- REALTORS® Land Institute & LandBrokerWebsites.com expects the chapter to have permission from the rightful owner to use any images, design elements and/or content that are provided for inclusion in the website, and will hold harmless, protect, and defend from any claim or suit arising from the use of such elements.
- REALTORS® Land Institute & LandBrokerWebsites.com retains the right to chapter websites, content and other website elements as examples in literature, training, documentation, portfolios and in business related projects.

FINAL AGREEMENT

- This agreement becomes effective only when initial payment is received from agents of Realtor Land Institute and RLI Chapter, by crystalcore.net. This contract was entered into in Texas and any dispute will be litigated or arbitrated in Texas.

Chapter Name: _____
Chapter Admin: _____
Chapter Address: _____

Signature: _____

Date: _____

Aubrie Kobernus, CEO

REALTORS® Land Institute, 430 N Michigan Ave, Chicago, IL

60611 Signature: _____

Date: _____

Mike Ciesienschky,
President
crystalcore.net

PO Box 181231, Dallas, TX 75218

Signature: _____

Date: _____