

# Best Practices Plan for FIABCI-USA Local Councils



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## **FIABCI Background Information & United Nations Relationship**

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### **WHAT IS FIABCI?**

FIABCI, the International Real Estate Federation, was founded in 1951 – the first World Congress was in 1948 – in Paris, at a time when today’s global real estate franchises and networks did not exist. FIABCI was one of the original association of real estate associations (Fédération Internationale des Administrateurs de Biens et Conseils Immobiliers). Over time, FIABCI’s role in the international real estate industry grew and today it is a prestigious global network of 80 professional associations, 84 academic institutions and 3,000 members in 65 countries.

### **WHAT IS THE FIABCI ADVANTAGE?**

The FIABCI advantage is true globalism and diversity with the aim of growing business opportunities for our members. What sets FIABCI apart from other organizations is that FIABCI embraces, at a local and global level, all categories and sectors of the real property industry. FIABCI members cover the whole spectrum of real estate specialties including brokerage, consulting, development, architects, financing, appraisal, property management, urban planners, insurance advisors, and educators.

### **THE FIABCI GLOBAL EXPERIENCE**

FIABCI members have opportunities to attend world class professional and educational programs at the local, national, and international level. With active FIABCI chapters around the world, members can connect with like-minded professionals anywhere in the world. The FIABCI calendar is filled with business and professional networking opportunities at meetings, congresses, trade missions and expositions.

### **FIABCI and the UNITED NATIONS**

FIABCI has had a firm and lasting commitment to working with the United Nations since 1954 when the organization was granted special consultative status at the United Nations Economic and Social Council (ECOSOC). ECOSOC serves as a central forum for discussing international economic and social issues and for formulating policy recommendations. FIABCI focuses on real property issues.

Working through the FIABCI International Organizations Committee, the World President appoints official representatives each year who contribute their expertise to the UN offices in New York, Geneva and Vienna as well as Economic Commissions in Europe, Africa, Latin America, the Asia-Pacific, Western Asia and the Department of Public Information. In addition any FIABCI member can apply for a short-term pass to visit any UN Office to participate in specific events.

Starting in 2016, FIABCI has been an official partner to the UN Habitat’s World Urban Campaign and continues “The City We Need is Affordable” campaign to focus on sustainable urban development and successful and scalable private sector solutions to quickly address the worldwide shortage of workforce housing in cities around the world.

### **HELPFUL LINKS:**

<https://www.un.org/ecosoc/en/>

<http://csonet.org/index.php?menu=134>

<http://unhabitat.org/>

## Local Councils

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The Local Council structure of FIABCI-USA provides the life-blood of the organization. Local Councils are FIABCI-USA's indispensable tool to attract and retain members. Local Councils also provide its leaders with high-level methods for building networks and business. Due to this mutually beneficial dynamic, it is our imperative to revive our Local Councils and provide our local real estate communities with global business development tools they cannot access elsewhere. We appreciate your service and have created this Best-Practices Document to guide and train our leaders to excel.



## Goals and Objectives

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Our Goals are simple – revive each FIABCI-USA Local Council to serve and educate global real estate professionals. By reviving each Local Council with top-notch programming and services we hope to grow our membership to 1,000 by the end of 2019.

Our Objectives will be reached by working as a team using the same game plan. This document serves as that plan. Followed by training and regular meetings, FIABCI-USA Local Council leaders will be supported by staff consultants as they guide their Local Councils to growth measurements established by FIABCI-USA leaders.

## Membership Benefits

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### Membership Benefits

- Make global connections, locally
  - Strategic collaboration with other globally focused groups (economic development entities, Consulates & trade groups, local Principal Members, international sections of local/state REALTOR organizations)
- Provide leading-edge resources and information sessions
  - Networking on a local/regional/national level about global issues and provide access to other globally connected professionals
  - Garner resources through our Local Business Councils (e.g. members only mastermind sessions, networking session, Business Clubs, book club, etc.)
  - Assemble a tool kit to help our members close global deals.
- Attract Members via the World Councils
  - Showcase international networking and available resources to specific areas of expertise.



## FIABCI-USA Member Toolkit

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Tool Kit Items - there are three key items designed to save our members time and money. They include:

- **FIABCI's International Referral Platform** – This is a formal, trackable request for global referral coordination. If FIABCI-USA members need assistance in placing business in other parts of the world, members now have the option of using the outstanding services of Leading Real Estate Companies of the World. You can link here: [www.fiabci-intro.com/](http://www.fiabci-intro.com/)
- **OFX Money Transfer** – This global money transfer partnership with OFX can literally save our members thousands of dollars on any transaction. It's also simple and safe to set up on line. Learn more here: [http://transfers.usforex.com/fiabci\\_ofx/](http://transfers.usforex.com/fiabci_ofx/)
- **Mortgages for Foreign Nationals from the UN Federal Credit Union** - Link to a representative of the Credit Union to help your clients secure a mortgage. Since the UNFCU is a portfolio lender, they originate and maintain mortgage loans, enabling an accelerated pace of processing, approving and closing their loans. Their flexible underwriting guidelines allow them to lend to those with little or no US-based credit and/or G4 visas. For more information click here: <https://jfagan-unfcu.mortgagewebcenter.com/>



## Membership Types

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- **Regular Individual Membership is \$595 per year.** A Regular Member can attend all local, national and international events at the member rate and hold any leadership office. Regular members are listed in the FIABCI International and FIABCI-USA Member Directories. Half of your FIABCI-USA dues goes to supporting operations of the international headquarters in Paris.
- **Local Affiliate Membership (LAM) is \$295 a year.** A Local Affiliate Member can attend all local events, but must pay the non-member rate for international events and cannot be an Local Council Officer. Local Affiliate Members will only be listed in FIABCI-USA Member Directory.
- **Young Members (\$289)** are those active in the industry who are 35 or younger.
- **Student Membership (\$195)** is available for full-time students of Academic Member Universities & Colleges.
- **Student Affiliate Membership is \$25.** Student Affiliates would only be listed in the FIABCI-USA directory.

Our membership is based on the calendar year. Members who join mid-year will have their second year invoice prorated. Members who join in the 4<sup>th</sup> quarter are covered until December 31 the following year.

Principal Membership for national real estate associations and Company Membership for companies or state associations is also available. For more information about Principal or Company Membership please connect with a FIABCI-USA staff consultant

FIABCI-USA Principal Members include the Appraisal Institute, AREAA, BOMA, CRS, IREM, NAA & NAR membership as of February 2017.

## Membership Marketing and Engagement



## **Ideas for how to promote the LAM membership category to potential/past Local Council members**

- Have membership brochures available at all events. Collect Business Cards and send a follow up e-mail to all nonmembers.
- Create email messages that specifically market the LAM membership to prospects and current members who will invite their associates. (a template email documents exists & can be shared on request.)
- Invite former members to take a new look. Include in email drip campaigns.
- Invite Principal Member Local Chapters - This could begin by building relationships with local chapters for Principal members, invite their members to events and give membership brochure, add to Local Council contact list and send email as part of a drip campaign.

## **Get Involved Section of Web Site**

- Staff consultants will write new content that invites and proposes different opportunities to get involved locally.
- Offer local opportunities to get involved in different mission-type opportunities eg: Sustainable Communities and Affordable Housing.
- Consider selecting a different cause or charity that the Local Council sponsors every year. Great way to give back and attract more mission driven millennial members.

## **Local Council Group Pages**

- FIABCI-USA Staff Consultants will provide training and support around how to use these tools.

## **Survey Reports**

- Create and disseminate Local Council surveys and report back the results. The results also give guidance for operational decision-making for the coming year.

## **Create a Membership “Drip Campaign”**

- Create a plan to dissemination frequent email prospecting messages designed and executed on a regular basis. Use the Global | Local | Connected jpg for a consistent look. Appoint one person to oversee this important task with other volunteers who will feed information to that point person. Local Council Leaders and staff consultants should discuss facilitation of this important task.





## Ideas for Educational Events/Information Sessions

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- Brown Bag Lunches/After Hour Sessions for MBA students/members (Collaborate with Academic Members and invite Industry Partners to provide content)
  - Please promote the FIABCI Scholarship during and after the program.
- Speed Networking Sessions – Link new professionals/students with long-time members from various real estate disciplines to help the new executive discover the correct career path and the long-time member to recruit and give back. Similar to speed dating, participants exchange business cards and engage in 5 minute conversations and then rotate around the room. (Can be done in conjunction with other events and is a way to invite and engage Principal Members.)
- Develop "Hot Spots" workshops – Where are the hot global markets? Invite a local expert to give a market trends report for a country or region. Consider the following resources: Local Consulates, Trade Groups, Academics and Local Associations (such as a Chamber of Commerce) with members in that market? Create a panel discussion and networking session afterward.
- Members only Mastermind Sessions – Up to 15 Members or prospective members only. Select a hot topic and work as a group to find solutions.
- Business Socials – invite experts from Principal Members to bring in cross sections of the industry to talk about trends and topics from different fields inside the real estate industry.
- Mentoring program – harness the power of experience matching FIABCI-USA leaders with tech savvy MBS students or new professionals. Set them up and then let them arrange how/when to communicate.
- Harness, leverage & promote Subject Matter Experts (SMEs) for mutual benefit. (Use at Brown Bags, After Hours and Hot Spot Workshops.)

### Educational Events



## Event Frequency

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### Frequency: Plan 4 Events Each Year (1 each quarter)

- 1 High-Level Cocktail party to kick-off promotion of the Grand Prix Award (feature past recipients if possible or hold the event on the site of a past Grand Prix Award Recipient if feasible.)
- 1 for installation of local leaders & award recognition – Members Only event with a market trends speaker. Consider making this an annual breakfast meeting.
- Collaboration with local chapters of Principal Members – invite Principal Member local chapters to participate when applicable and ask for them to include your members at similar events. Collaborate with other local global organizations when it adds value to FIABCI-USA members.

- Pick a local cause or charity – this may be a way to involve millennial members and build name recognition within your community. Pick a charity with applicability to real estate.
- Who do you know? Invite your high-profile contacts to Local Council events and introduce them to your fellow FIABCI members.

## **Event Planning and Marketing**

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### **Event Planning Basics**

- Create a “to-do” list when planning an event. (An template excel document exists and is available on request.)
- Assign specific tasks to volunteers and include due dates. This will help keep everyone on task.

### **Event Marketing**

- Create a marketing schedule and send save the date and event registrations via social media and emails.
- Plan your marketing schedule at least 6-8 weeks before an event. Once speaker and venue have been secured, a simple save the date notice can be sent.
- Use the speaker logistics form to ensure you have the correct audio/visual media needs ordered for your speaker before the event begins.
- You can use the FIABCI-USA on-line system to collect registrations & credit card payments. (after updated site is operational.)
- Inform FIABCI-USA staff so that your Council will be supported. FIABCI-USA will add the event(s) to the web calendar, newsletter calendar and help with marketing and planning if necessary.
- Create post event press release prior to event and have link to pictures that can be quickly downloaded.
- Add information about the event on Social Media sites.
- Send a thank you and template event survey to all those who attended.

### **Event Execution**

#### **Before Event**

- Create a registration table manned by volunteers. Print out, check off names and warmly welcome everyone as they enter.
- One of the top member benefits identified the FIABCI-USA member survey is networking. Make sure you have pre-printed or sticker name tags to help facilitate networking.
- Secure member to introduce speaker and have speaker biographies available before the event. Introducing member should read the biography beforehand.

### **Post Event Follow-Up**

- Send a thank you email with event survey (sample event survey will be provided).
- Please add pictures and brief overview to social media outlets within 24/48 hours.
- Distribute simple press release to you press and industry partner contacts.
- Send info to FIABCI-USA for inclusion in the next newsletter.

## Communication | Local Collaboration & Engagement

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### Seeking Support and Sponsorships from Local Industry Partners & Local Associations

- If your local Principal Member organizations have international programs, seek collaboration or financial assistance to mutually support each other. They too are likely looking for local programming and membership benefits.
- Once your calendar is set, let your past sponsors and possible sponsors know the dates and topics.
- Use the sponsorship brochures to explain sponsor options and benefits.
- If sponsors want something specific, not mentioned on the sponsorship form, negotiate with them.

### Introducing Local Councils to local Principal Member Organizations, Related Real Estate Organizations & Globally Oriented Arts & Cultural Institutions

- Seek out collaborations that makes sense with local international groups – make building these relationships a priority – networking with these groups likely will provide additional benefits for your professional life as well.
- Create an email list of local global civic and arts organizations that you would like to invite to your programs. Ask them to invite their members to attend.



### Building rapport with local press

- Building trusting relationships with the press is a worthwhile activity.
- Invite members of the press to contact you if they need information or comments about the impact of global issues on the local marketplace. Become a press “go to” resource for globally oriented real estate topics.
- Build a pipeline of members who know the local press. Introduce your replacement to the press to continue the relationship with the FIABCI-USA Local Council.
- Grand Prix Promotion and Post Award Press – send information about the Grand Prix at the time you seek proposals and hold an event. Invite the press to help you spread the word and build the brand of the award.

## Local Calendar of Events

- Find a source that lists international or real estate events and always send your event notices to them for publication. EG in Chicago it is <http://calendar.itagc.org/>
- Work with FIABCI-USA Staff Consultants on setting a newsletter Editorial Calendar & feeding newsletter content/Thought Leaders. Newsletter topics could be one part of a Membership Drip Campaign to attract possible new members.
  - FIABCI-USA staff consultants are looking for items to include in the National monthly newsletter. If you identify a local thought leader you would like to promote nationally, please identify to staff.
- Local Have/Want information Exchange – please make sure there is always a Have/Want table at each of your events. Invite members to distribute their marketing materials at the event.
- Alerts and Notifications | Spreading the Word About Local Public Affairs Matters
  - FIABCI-USA is a non-partisan organization taking no stands on political matters, but if there is a local issue that impacts your members, consider sending news items via your FACEBOOK and TWITTER feeds.
- Web Site Resources – Update on How to Use
  - FIABCI- USA staff consultants will set up a separate training with handouts to explain how to use the Online Member Community web site for greater productivity and connectivity.
- Social Media Strategy
  - Please use Social Media outlets to promote events, keep Local Council members abreast of pertinent updates and news items. Train two volunteers on how to use.
- Building Communication Platforms
  - We will schedule regular Go-To-Meetings for Local Council Leadership to connect with each other and exchange ideas and discuss issues.
- Local Global Market Updates – Where/When
  - Consider planning at least one annual local market update on foreign investors coming to your area using a local expert and invite all principal members.
- FIABCI-USA engagement of local/regional economic development organizations & consulate and trade groups in your area
  - Reach out to these groups by subscribing to their email newsletters or tracking on Facebook. Attend their meetings and introduce yourselves. Invite their key staff to your events when applicable.
- FAQs
  - FIABCI-USA staff will be creating an FAQ page on the web site. Please let them know what common questions you receive so that we may create a place for you to refer possible new members.

## Governance

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- Creating and Documenting Systems that Work
  - This best-practices document is a living document and will continue to evolve. Being organized involves implementing systems that work and communicating consistently to membership.
- Board Leadership Roles | Responsibilities
  - The Board of Directors shall consist of a Council determined number of Vice Presidents or Directors including the President, Immediate Past President, at least two (2) Vice Presidents, and Secretary/Treasurer.
  - Other Past Presidents of The Local Council can be ex-officio directors without voting rights.
  - All directors will serve one (1) year terms. Officers shall serve no more than two (2) consecutive years in the same position but may be re-elected at another time for that position.
  - Please refer to Chapter IV & V of the Local Council Bylaws.
- Committee Meetings, Role & Responsibilities
  - Please refer to Chapter VI of the Local Council Bylaws.
- Financial & Fiduciary Responsibilities
  - Local Councils operate under the organization's tax number and cannot incorporate separately.
  - Each must report to the organization all income and expenses each year.
  - FIABCI-USA will provide proper oversight by implementing financial controls and monitoring income and expenses of each Local Council.
  - Please refer to Chapter VIII of the Local Council Bylaws.



## **Financing Local Council Events/Educational Offerings**

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FIABCI-USA staff consultants are here to assist Local Council volunteers with fundraising and the seeking sponsors. Also, in late 2016 the new Local Affiliate Membership (LAM) category was created to help support all Local Councils financially. For each new LAM who joins, the associated Local Council will receive \$100 from FIABCI-USA. When a new LAM joins, the President should be notified electronically (as of February 2017). Local Council Presidents should work with Local Council Treasurers to keep a tally of the amount. When needed, the Local Council can request those funds in writing from FIABCI-USA, who will disburse a check to the President for use paying for event expenses. Please note: two FIABCI Local Councils have their own checking accounts. This practice, is not recommended for the other eight councils. Going forward, FIABCI-USA will work closely with each Local Council to ensure financial issues are streamlined, efficient and effective.

## **Other Considerations**

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- Understanding the Millennial Mindset – Growing Young Members
  - Appoint a working group of young members from each Local Council to assist with membership development activities.
  - Learn more from research provided by Lynn Yazbec of Yazbec Consulting
- Non Dues Revenue Generation
  - We are interested in your ideas – what events or services could we create to produce non-dues revenue. Any profit made at the local level can be used for further organizational development at the local level

## **Evaluation (impact assessment)**

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The activities of each Local Council should be evaluated to measure how much it has contributed to the pre-defined organizational growth goals. Information can be gathered by tracking attendees at events, survey replies and any other written feedback

The evaluation process can be conducted as part of annual Local Council Compliance Reporting process.

*Thank you very much for your commitment to growing FIABCI-USA. Staff consultants look forward working with you to help grow this fine organization which has added so much value to members work and lives.*

## Appendix – Additional Tools/Forms Needed

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- **Important Documents**

- Planning Calendar
- Meeting Agenda
- Meeting Minutes
- Prix Documents & link to on line registration materials
- Sample Press Release about Grand Prix
- Sample General Press Release form
- Email message using the Global | Local | Connected graphic
- Membership Recruitment Email with Instructions
- Event thank you message with generic survey
- Speaker agreement forms/media logistics wish list

FIABCI-USA Bylaws

Local Council Bylaws

- **Research Needed for Each Council**

- Press Outlets with RE Reporter Contacts
- Councils/Org with specialty in sustainability, smart cities etc.
- Consulates & Trade Groups (with contact information)
- Real Estate related Local orgs, architects assoc, designer orgs, escrow company
- Local contacts for FIABCI-USA Principal Members (staff/key leadership)
- Other groups?