

# CONSUMER ADVOCATE PROGRAM Implementation Guide

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## Purpose & Introduction:

The Consumer Advocate Program is comprised of individual members who serve as watchdogs to keep abreast of local issues impacting real estate and private property rights within the community in which they live.

The purpose is to assist Association leadership in staying ahead of issues before they are enacted. The goal is to have at least one advocate (member) in each of the communities within your association's jurisdiction. One member may elect to serve for more than one community, particularly in smaller towns.

The Program is overseen by the Government Affairs Task Force and the designated staff liaison. The concept of volunteer leadership managing the Advocates is meant to reduce the administrative burden on Association leadership.

### Objectives:

- To capitalize on relationships between politically engaged members and local municipal leaders
- To build relationships between local municipal leaders and less experienced or engaged members who have an interest in their community
- To develop an early tracking system to identify and address issues of concern
- To consider a course of action in response to an issue
- To build a sense of confidence and ease among REALTORS® to engage in the decision-making process in their community and be advocates for/against issues effecting real estate and private property rights
- To position REALTORS® as having an impact on local decisions effecting real estate and private property rights, and be seen as such by the community
- To place the REALTOR® in the forefront as a defender of private property rights, and the point person when issues arise
- To develop Association leadership
- To increase member involvement in association government affairs programs

## Workflow:

The responsibility for the various steps and workflow can be assigned based on the Management Model the Association chooses.

## Administration:

### Step 1: Recruitment

- Conduct a [survey](#) of members to:
  - Identify who is already volunteering or active in their town
  - Identify who is interested in becoming more involved
  - Tease out the program
- Make announcement about consumer advocate program
- Hold twice yearly information sessions
- Staff or Government Affairs Committee members will alternatively attend Association events representing the Consumer Advocate Program to recruit new Advocates.

#### Resources:

- Consumer Advocate Program Description
- Model Survey

### Step 2: Training & On-Boarding

- Add them to a listserv or Google Folder where Training Materials and Resources can be readily accessed.
  - Send email introducing them to the rest of the Advocates
  - Send them an email introducing them to other Advocates in their town (if applicable)
- Provide new Advocates with training material and handbook
  - In either a Quarterly Welcome session or after a Government Affairs Task Force meeting
  - Ask them to commit to watch the training videos within two weeks of the meeting (this will help ascertain who is serious and who isn't). Alternatively, videos can be watched together, and the Advocate Action Assignments can be worked on collaboratively.
  - Engage them as a group in hands-on problem-solving. Provide them with one or two examples of issues that might come up and challenge them to work through how they would answer the questions in the Issue Assessment Worksheet.
  - Ensure they are clear that they are not to represent the Association on issues unless asked. Otherwise they are engaging as private citizens.
  - Set expectations that approximately 1/5 of issues reported will result in action so they aren't discouraged when nothing happens.

#### Resources:

- Application form to become a Consumer Advocate

- Consumer Advocate Handbook & associated Cheat Sheets & Work Sheets
- Training Videos

### Step 3: Engagement & Content Curation

Many non-profit volunteer programs fail because volunteers aren't regularly engaged, informed, and don't feel a sense of ownership for their role and the organization. Therefore, it is critical to have regular communication with the Consumer Advocates (at least quarterly).

- Educational content creation (which can be as limited as 3-4 lines)
  - Designed to get Advocates thinking about different issues to be looking out for or how to engage in their communities. (For example, if the Board of Health changed the definition of a bedroom or the Fire Inspector changed the inspection process it could drastically impact their business.) Should to be used in either check-in emails or as prompts for Government Affairs meetings.
  - Should follow the Issue Assessment format (who, what, where, when and why) so Advocates get used to asking those questions themselves
- Regular (at least quarterly) speaker/panel discussions on Government Affairs topics (either process or issue based)
  - Whenever possible, follow the discussion with a hands-on hypothetical issue to work through as a group to get them into the practice of approaching issues as an Advocate.
- Regular check-ins (emails and/or conference calls with at least one personal phone call per year to each Advocate):
  - Spring: Regular (ideally monthly) check-ins with advocates about town meeting warrant
  - Summer: One check-in
  - Fall: Regular check-ins about fall town meeting warrant
  - Winter: Regular check-ins with advocates about town meeting warrant
- Celebrate success and engagement:
  - Include shout-outs to Advocates who have engaged properly and/or been particularly helpful in emails to fellow Advocates (but this could also be included in the regular newsletter to promote the program and the value of membership).
  - Have an annual Government Affairs thank-you party for Advocates
    - Create a "Consumer Advocate of the Year" award with an accompanying gift card/basket

#### Resources:

- Issue Assessment Worksheet

#### Step 4: Issue Identification and Vetting

- When a Consumer Advocate identifies an issue, ensure they use the Issue Assessment Worksheet to get the information to their liaison.
- Investigate the issue further.
- Share the outcome of the research with the CEO/Board along with a recommendation to oppose, support, or stay neutral.
  - Can also share with the Government Affairs Task Force
- CEO/Board makes final decision about action and shares that decision with the Program Manager.

#### Resources:

- Issue Assessment Worksheet

#### Step 5: Action

When the CEO/Board decides to act on an issue, it may require members act.

- Create Talking Points using the Talking Points Template, including how and when to testify or contact decision makers. Make the action as easy as possible for members! This may mean providing phone numbers or email addresses for decision-makers.
- Program Manager reaches out to Consumer Advocates in the town where the issue is arising. This should be done via phone call to ensure responsiveness.
  - Begin with the most engaged Advocate. Ask them to if they will accompany new members to hearings.
  - Inform them of the issue (unless they reported it) and the position of the Association.
  - Ask them to take the specific action step.
  - Offer the support of the more engaged Advocate, if applicable.
  - Get confirmation they are willing and able to take the action.
  - Send an email with the Talking Points
  - Send follow-up emails to either remind them of their commitment or remind them of the date of the hearing.
- Consumer Advocates report response to Local Political Coordinator.

#### Resources:

- Talking Points Template

#### Step 6: Issue Monitoring and Information Sharing

To ensure engagement, it is critical the Consumer Advocate is updated on, at the very least, the outcome of the advocacy.

- Designated staff liaison or volunteer leader monitors issue, checking in with town staff.
- Consumer Advocates from that town are sent email updates thanking them for their advocacy and letting them know the current status of the issue.
- Once the issue is passed or defeated, another email goes out to the Advocates for that town.

- The issues, the action, and the outcome should also be shared with the rest of the Advocates to a) prompt them to keep an eye out for similar issues in their town b) promote a sense of friendly competition amongst the Advocates to be more engaged and c) see their work has value and impact.

#### Step 7: Program Assessment & Revision

- At the end of the year, ask Consumer Advocates to take a survey to assess what parts of the program worked well, what could use improvement, and other suggestions they have.
- Once revisions are made, be sure to share those changes with the Advocates to show their feedback has value.

#### Annual Schedule: (Suggested)

##### Spring:

- Government Affairs Task Force attends other Association events to recruit
- Info Session I
- Regular (ideally monthly) check-ins with advocates about town meeting warrant
- Content Curation
- Government Affairs Task Force Topical Meeting and/plus
  - Training & On-Boarding Session

##### Summer:

- Government Affairs Task Force attends other Association events to recruit
- One check-in
- Content Curation
- Government Affairs Task Force Topical Meeting and/plus
  - Training & On-Boarding Session

##### Fall:

- Government Affairs Task Force attends other Association events to recruit
- Info Session II
- Regular check-ins about fall town meeting warrant
- Content Curation
- Government Affairs Task Force Topical Meeting and/plus
  - Training & On-Boarding Session

##### Winter:

- Government Affairs Task Force attends other Association events to recruit
- Regular check-ins with advocates about town meeting warrant
- Content Curation
- Government Affairs Task Force Topical Meeting and/plus
  - Training & On-Boarding Session
- Awards/Thank You celebration
- Annual Program Assessment Survey & Program Review

## Program Structure & Apportionment of Responsibilities

### Management Structures:

Because each Association has a unique staffing and volunteer situation, it's up to each Association to determine the best management structure for them. It's critical whomever the Association chooses to manage the program has a sense of ownership, is responsible and responsive, and understands fully the role they are committing to. (See Program Manager Workflow.)

Even under shared leadership models, there should still be an internal champion of the program from the Government Affairs task force.

Associations should also consider creating a designated email account which is copied on all Consumer Advocate Program communications. That way if the volunteer or staff leadership changes, all the communications are still preserved.

Here are some models:

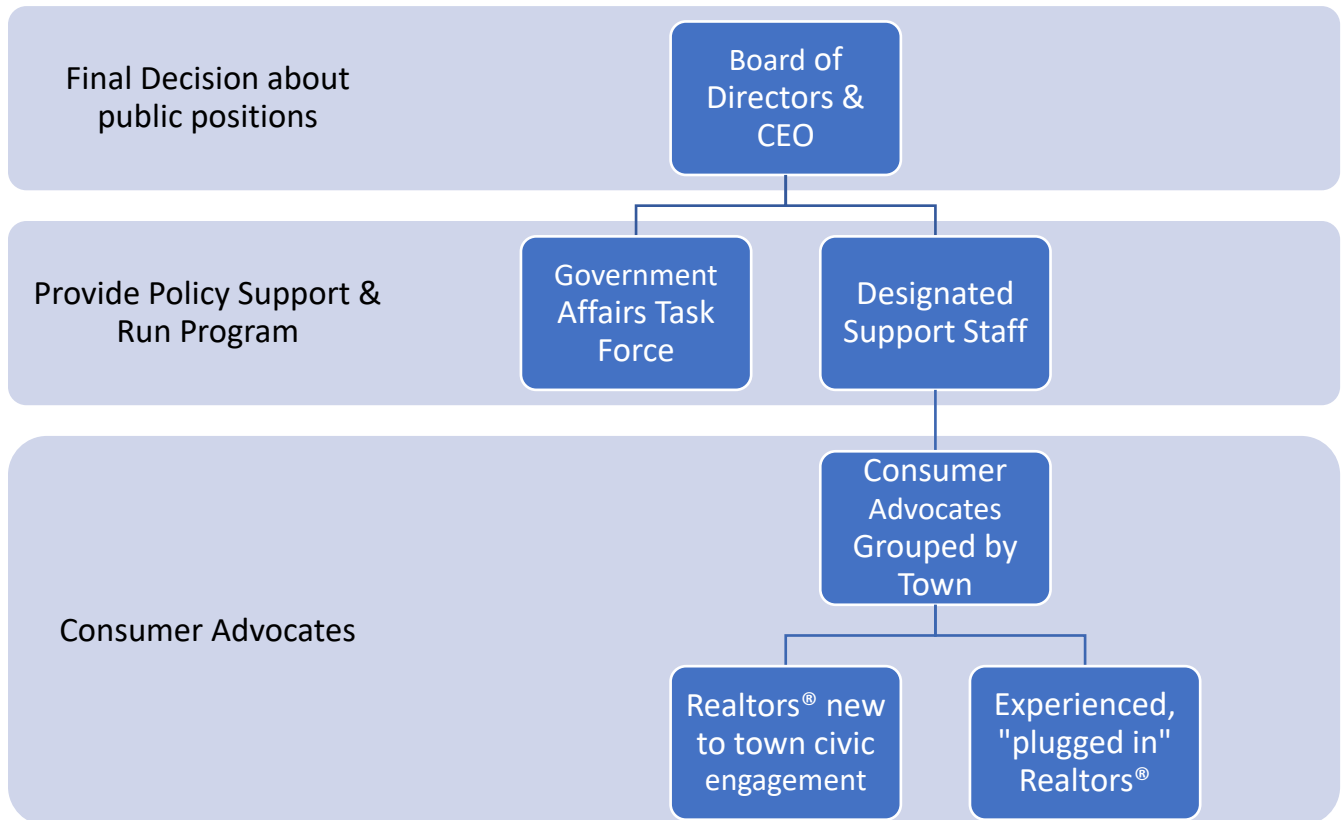
**Management Model #1:**

*Designed for Associations with a designated staff person, such as a Regional Government Affairs Manager.*

Description:

The Chief Executive Officer chooses a staff person manage the effort. Under this model, the staff person serves as Program Manager and either:

- 1) Completes the Program Management workflow themselves and has volunteer support from Government Affairs Task Force; or
- 2) Manages a group of other volunteers to serve as Program Liaisons, such as the Government Affairs Task Force, who do the workflow





**Management Model #2:**

*Designed to minimize staff involvement and maximize volunteer leadership. Best for Associations with robust and engaged volunteers and for organizations with limited staff resources.*

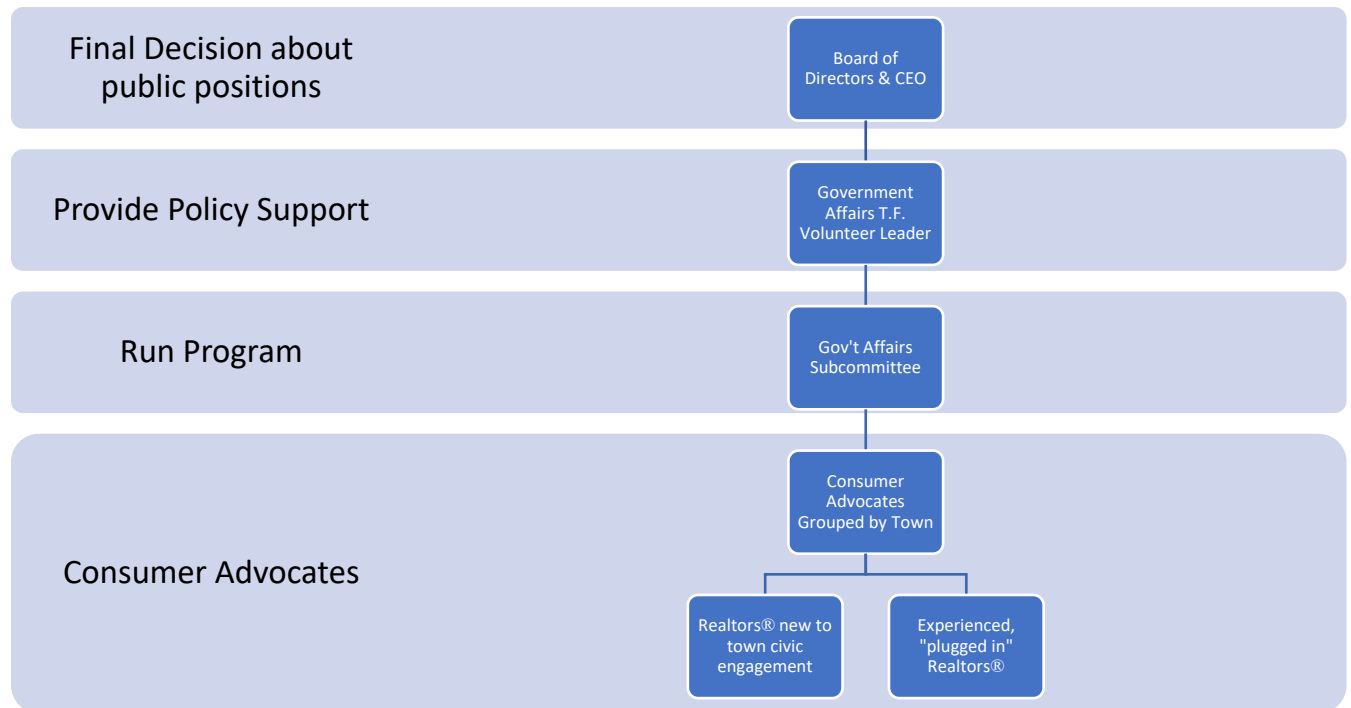
Description:

The Government Affairs Task Force chooses a member (or appoints another appropriate volunteer) to chair the effort. Under this model, the volunteer leader serves as Program Manager and either:

- 1) Completes the Program Manager workflow themselves; or
- 2) Manages a group of other volunteers who do the workflow

Application Process:

Under this model, rather than chasing down volunteers, it is recommended the Association create a competitive application process where volunteers are vying for a coveted position.



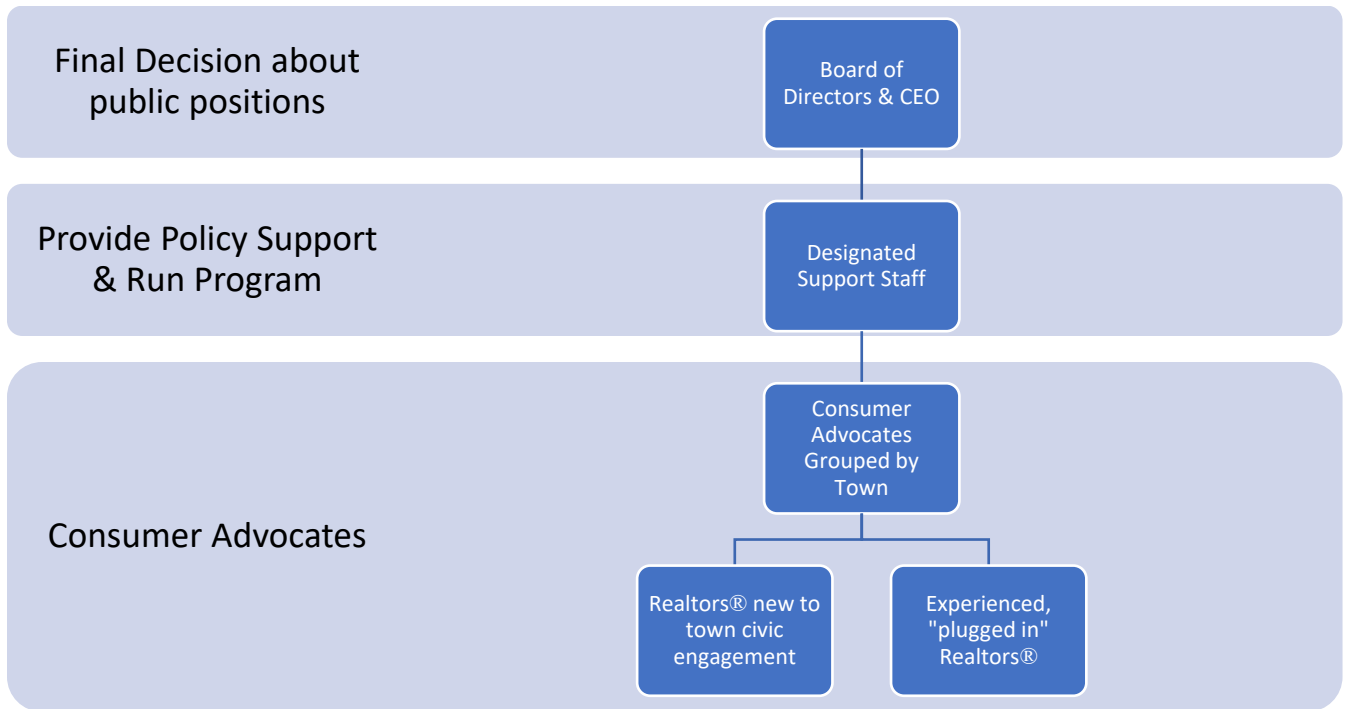
Management Model #3:

*Entirely staff managed and separate from Government Affairs Task Force.*

Description:

The Chief Executive Officer chooses a staff person manage the effort. Under this model, the staff person serves as Program manager:

- 1) Completes the Program Manager workflow themselves



## Board of Directors & CEO:

### Responsibilities:

- Review vetted policy issues and determine official course of action
- Communicate action or non-action to Program Manager or Designated Support Staff

## Designated Support Staff:

As different Associations have different staffing resources, this role could be filled by a) designated (possibly regional) Government Affairs Manager b) the CEO or c) other staff. While volunteer leadership is designed to vet an issue as much as possible, it is important to have some level of staff support.

### Responsibilities:

*Insert workflow based on Management Model.*

## Government Affairs Task Force:

### Responsibilities:

*Insert workflow based on Management Model. But ideally responsibilities include, at a minimum:*

- Monitors the life of an issue, tracking its outcome
- Hosts speaker meetings once a quarter to engage & educate the membership
- Committee members will alternatively attend Association events representing the Consumer Advocate Program to recruit new Advocates.

## Convening/Meeting Topics:

Committee members will obtain a speaker or panel of speakers to discuss how a local decision can impact the real estate business and/or private property rights as well as speakers on civic engagement topics. Subjects may include (but are not limited to):

- Zoning
- Fire Inspections
- Taxes
- Public Speaking
- How Town Meeting/City Council works
- Current affairs

## Program Manager:

Description: Volunteer chair or staff member who “owns” the program. Can do it entirely themselves or manage a team of volunteers. Serve as liaison between the advocates and executive leadership.

### Qualifications:

- Has a history of involvement in the Association (serving on a committee, regularly attending events, etc.)
- Shows good judgment and commitment to program goals
- Ability to lead others and build consensus
- Moderate political/civic engagement knowledge and experience
- Has \_ hours/week to devote to managing the program *\*Depends on the Management Structure*

### Responsibilities:

- Recruits Consumer Advocates (either personally or thru Government Affairs Task Force)
- Serves as a point of contact for Advocates (this is best divided up evenly or as the committee agrees)
  - Invites them to Government Affairs Task Force speakers' meetings.
  - Answers questions they have as they come up
  - Reaches out to & receives report of issues from Advocates
    - Ensures the Advocates ascertain pertinent information
    - Shares information with Designated Support Staff person or CEO
  - Communicates advocacy action from Government Affairs Task Force & Designated Support Staff
    - To Advocate who reported
    - To other Advocates in town, when appropriate
    - Follows-up to ensure action taken
    - Reports action taken back to Designated Support Staff or CEO
  - Communicates outcome of action
    - To Advocate who reported
    - To other Advocates in town, when appropriate
- Commits to regular reporting of program to Designated Support Staff or CEO
  - Weekly/Monthly one-page update including:
    - Three recent accomplishments
    - Three challenges
      - Where they are stuck
    - Number of Advocates reporting during designated period
    - Next steps
  - Weekly/Monthly phone call with executive leadership to review update and discuss particulars of issues coming up in communities
- Conducts annual review & celebration

### Application Process (if volunteer):

Under this model, rather than chasing down volunteers, it is recommended the Association create a competitive application process where volunteers are vying for a coveted position.

### Consumer Advocates:

Ideally, Associations should recruit members who are already politically engaged in their community. But since volunteerism, particularly for civic engagement, is often challenging, the program also works for political newcomers.

### Responsibilities:

- Builds relationships & “plugs in” to their community
- Identifies Issues of Concern: Policy proposals impacting REALTORS®/property rights/homeowners within the city or town in which they live.
  - Uses the Issue Assessment Worksheet as best they can to help the Association look into the issue more
  - Sends Worksheet to Consumer Advocate Program liaison
- Investigates issue further when asked
- Follows-up with advocacy – only when asked and provided with clear guidance on doing so.
  - Uses Association-provided talking points & Elevator Speech cheat sheet
  - Communicates outcome to liaison

### Training Materials:

Advocates training videos are short, subject-related videos. Members with more political experience can skip the material they are already familiar with.

### Cheat Sheets & Worksheets:

- My Town Worksheet
- Issue Assessment Worksheet
- Elevator Speech Cheat Sheet

### Resources & Sample Documents:

- Survey on involvement/interest (5 questions)
- Consumer Advocate Program Description
- Pledge Form
- Talking Points Template
- Consumer Advocate Handbook & Frequently Asked Questions

- My Town Worksheet
- Issue Assessment Worksheet
- Elevator Speech Cheat Sheet