

**Page: Entry Information**

**Chapter**

Community Associations Institute of Orange County

**Chapter Size**

Extra Large (1201+)

**Category**

Public Affairs

**Program Name**

OC Realtor Outreach Program

**Each question is worth 20 points and will be scored using the following rubric:**

**(1-5) Poor** Didn't effectively answer the question

**(6-10) Fair** Answered the question

**(11-15) Good** Answered the question with more detail

**(16-20) Excellent** Went above and beyond with proven results and visible data

## **Describe the program and why it fits the category. (20pts)**

OC Realtors® Outreach Program. The program centers around an educational presentation, a three-hour interactive discussion, that is designed to educate the Realtor® population on homeowner association law and practice so they may better serve the consumers they represent in transactions within an HOA, who are either currently CAI constituents, or will soon become CAI constituents. Although California requires real estate salespersons and brokers to complete 45 hours of education over a four-year licensure renewal period, none of the hours are required to be HOA specific education, even though, in some communities, sales of units within an HOA make up half of all residential sales transactions.

CAI-OC felt HOA specific education could be of great benefit to the real estate industry and the customers they serve. The challenge for our friends in real estate sales is the standard entry level HOA education program is 10-12 hours over multiple days. So, we condensed the education program, leaving just the information a Realtor® would need to know, not the full program which teaches one how to manage and govern HOA's. If one lives or owns in an HOA, and particularly those that serve on a HOA board, we encourage signing up for a full education series offered by the chapter. The goal for the What Every Realtor® Should Know presentation is to stick to the issues every Realtor® should know.

The program allows CAI to expedite the timeline for individual HOA members awareness of CAI and its member services by reaching them at the transaction process. CAI-OC has educated hundreds of Realtors® since the program began in 2019, and based on participant surveys, approximately 60% of attendees live-in, or own property in, a HOA personally, therefore, we are able to educate our current constituents, and those who may lead us to our future constituents, simultaneously. Access to OC Realtors® and its 15,000 members is an enormous opportunity for CAI-OC to reach the Orange County homeowner population.

As the program is not core to their credentialing and continuing education requirements, all the attendees are there for the specific education, and therefore more likely to be active agents working with clients interested in HOA living. The Realtor® programs have produced the best attendance with the least resources expended for the CAI-OC Education Committee. The OC Realtors® provide the facilities, refreshments, and materials when conducted in-person, and the technology needs when conducted remotely. CAI-OC provides the instructors. With no other way to find home buyers before they purchase, vs people who already own real estate and show up on tax rolls, using the Realtors® population to achieve earlier CAI awareness is an enormous opportunity, one that multiple Fortune Five Hundred companies invest significant resources to cultivate.

The long-term goal is to expand upon the opportunities. One way towards that is to have more interaction with other CAI-OC committees. Such as Publications. Attached for reference are two articles published in the OC Realtor® magazine in 2019 ("5 Things..."). CAI has multiple issues of overlapping interest with the Realtor® population. Governmental relations, for instance. CAI and Realtors® both have an interest in understanding local issues and working with the various agencies on transparency and community involvement. Areas of overlapping interest also includes crime prevention, public transportation, disaster preparedness, parks and recreation usage, and regional healthcare services available, to name just a few. Published articles in Realtor® magazines authored by CAI member experts would help the agent population and the consumers they serve while creating a greater awareness of CAI and the myriad of products and services we have to offer by reaching a new and larger audience.

Another opportunity may involve membership recruitment. Over half of all Realtor® participants thus far have had some form of relationship with at least one HOA. Follow-up programs with attendees that offer incentives to participate in other CAI events, use other CAI resources, and, ultimately, achieve CAI membership may be worth dedicating volunteer time to administer. Additionally, the Realtor® population meets the HOA population most in need of CAI member services – HOA's with deferred property maintenance, legal, and/or financial issues - and wanting professional advice on topics that also pose an obstacle to their needs of facilitating sales transactions of units within these challenging HOA's. Making the OC Realtor® population aware of the multitude of services membership offers could motivate them to be a referral source for CAI, to ensure the associations within their service area are part of the housing stock available to market.

## **How did this program meet the mission and vision of the chapters and CAI as a whole? (20pts)**

By educating professionals and consumers. CAI-OC respects the fact there many professions involved in creating and maintaining a vibrant community. Working with real estate sales professionals involved in the development and the sales of homes within an HOA is essential to the overall success of individual communities, as is working with qualified professionals to maintain the facilities once created. By targeting licensed and credentialed professionals we are able advance the excellence of education in community association living by reaching more consumers through related professional fields.

## **What was the impact on the chapter and its members after completing the program? (Growth of membership, financially, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20pts)**

The program is still in its infancy, therefore there are few measurables to compare. However, there are already benefits from the program, including:

- CAI-OC has educated over 400 unique licensed real estate agents in Orange County in the first 3 years of operation. As the population of educated Realtors® grows, the number of consumers exposed to CAI grows exponentially.
- A video of the program is available via the OC Realtors® website and is now part of the OC Realtors® essentials in the new agent training course. Since 2021, all new licensee members of OC Realtors® are given a link to the program as part of their orientation package to the industry. OC REALTORS (vimeo.com). The video is replaced with each new updated version of the program.
- As previously noted, CAI-OC has had multiple pieces published in the OC Realtor® magazine, who's membership and readership are ten-times that of CAI-OC. The ability to reach this large, specific audience, is unprecedented in CAI-OC's history. The attached link is a 2021 article authored by a committee member.  
[https://issuu.com/ocar/docs/2021\\_may\\_and\\_june\\_magazine\\_template\\_web\\_final](https://issuu.com/ocar/docs/2021_may_and_june_magazine_template_web_final)
- Developed relationship with an important stake holder. In California, and most other states, the real estate lobby is among the largest and strongest in legislative affairs and public relations. In a 3-year time span we have been able to develop a relationship with paid professional staff, and volunteer board members, of the OC Realtors®. Realtors® and Community Managers working together to educate one another, and expand our knowledge of each other, will facilitate greater open dialog to all subjects, which can be immensely helpful when we find ourselves on opposite sides of an issue. Additionally, working closely with the Realtors® will demonstrate to them, to us, and to consumers and legislators that we are all committed to being responsible partners in the housing eco system.
- CAI Exposure. As the program is hosted by the OC Realtors® it is promoted on all their social media outlets and branded publications. Exposing CAI and its mission of education and promoting the benefits of HOA living to tens of thousands of OC Realtors® members and followers.
- CAI-OC has access to two OC Realtors® educational classrooms, one at each end of the county. The OC Realtor® management has been so impressed with the quality of education we provide to their members, in a show of gratitude, have offered the CAI-OC Education Committee complementary use of their excellent facilities for our programs that do not involve their members. These are A level classrooms – seating for 100, great AV system with multiple giant screens, comfortable chairs, phone charging stations, and complementary coffee and water. The fees to rent similar accommodations would be thousands of dollars.

## **Please provide quantifiable data supporting the rationale for success. (20pts)**

The What Every Realtor® Should Know education program is a condensed version of CAI-OC Community Leadership Training Program. The CAI-OC Education Committee has been providing these types of classes to homeowners and Community Managers for more than 20 years. They have been offered in daytime and evening hours, weekdays, and weekends. They have been conducted in a single day, and over 2-6 days. We have done them for free, done them with nominal costs to cover expenses, we have sponsorships, funded via business partners, available to most anyone wanting to attend. Great attendance has been 30 persons, average attendance in the low 20's, many of whom are affiliated with the same HOA. CAI-OC hosts the events, on-site or via video conference, and has a few hundred dollars in hard costs for each program.

All of the OC Realtors® programs have been above 30 persons in attendance, with the highest in the 60's. The OC Realtors® programs have \$0 cost to CAI-OC.

CAI-OC has educated over 400 hundred unique Realtors® since the program began in 2019, and based on participant surveys, the satisfaction level of the attendees is extremely high (they get free high-quality education in a comfortable setting; high satisfaction is anticipated). Therefore, we know that over time the good word of mouth will create greater brand awareness of CAI in the real estate community.

Another sign of the programs worth and success is the volunteer faculty. CAI-OC only uses Education Committee members as presenters. The committee faculty all maintain the appropriate CAI credentials. The OC Realtors® program necessitates an attorney, an insurance professional, a reserve analyst, and a financial expert or community manager. These professionals donate their valuable time to provide the education. The presenters are all experienced, successful practitioners and have multiple options when donating their time to the industry. The fact that we have had a full slate of presenters for the 17 programs, in 2 locations and via video conference, over 3 years is a testament to their belief that educating the Realtor® population is a worthwhile endeavor.

## **Based on the results, will the program be a regular part of the chapter's programs in the future and why?**

Yes. And we believe there is more to come.

Like other professional associations, the California Association of Realtors® (CAR) has various committees. One of those committees, Consumer Protection, has participation from all the AOR's in the State, approximately 40, representing CAR's membership. It is a forum where industry business partners, such as the lending and insurance groups, home inspectors, escrow officers and other real estate related fields liaison with the Realtors®. They discuss new products, trends, legislative actions, etc. It is designed to create communication among the interested parties in the real estate transaction process. A CAI-OC committee member served on the committee in the '90's when in the home inspection industry. CAI should strive to have a representative liaison with the Realtors® at the state level. They (pre-pandemic) meet twice a year in-person in conjunction with CAR's annual conferences. They typically have two per year. One each in the Spring and Fall. They hold one in Sacramento as part of their legislative efforts, the other rotates to major cities around the State.

Once we have a relationship with CAR, we can begin to seek volunteers in other CAI Chapters. As the Power Point program is there for their use, they would simply need to find instructors willing to teach the classes locally, either via video conference or in-person. The more local CAI chapters and AOR's that work together, the greater the bond developed among the statewide groups. We can work with CAI-CLAC to ensure all CAI chapters have an opportunity for input and to participate in the delivery of information. We may also persuade CAR to have the program at one of their two annual meetings. As you know, the information changes annually with the legislative changes, so having it as a staple for their members serves their interests.

Nationally

Our OC Realtor® contact, Cassie Cardenas, also works with NAR on education and certification programs. She is a strong supporter of the program and has offered to arrange meetings with NAR's group to discuss offering Realtor® education nationally, and/or creating a "HOA Specialist" certification that members could achieve and demonstrate their expertise in the marketplace. While any product created would be for NAR, having CAI as the source of information, and potential providers of the programs, would broaden CAI's profile in the real estate industry. CAI-OC hopes to show locally, what is possible nationally.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

**Would you like to upload additional documents?**

Yes

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