



Texas REALTORS® 360 Meeting Guidelines

Meetings are planned so members across the state can meet the Texas REALTORS® Leadership as schedules permit. Working in partnership with the other associations in the region and Texas REALTORS® staff, these events are planned by a key contact association staff member of the hosting association. RVPs should promote the meeting with the mega region and assist the key contact staff member.

It is the goal of the Texas REALTORS® that the members of the mega-region work together to maximize participation and provide an affordable meeting for members of the mega region. The Texas REALTORS® 360 Meeting is not intended to be a revenue generator for the hosting association at the expense of the other associations in the mega-region.

The Texas REALTORS® Meetings staff will send a save the date message to members in the region, post the meeting on the website, and send an invitation to register at the appropriate time. Please be sure to inform the team as soon as a date and location are set and as soon as registration is available.

Please note these are guidelines only. Every regional meeting is a little different and is intended to meet the specific needs of the region. If you want to change the meeting structure, please reach out to Meeting Planning at 360meetings@texasrealtors.com

Who Should Attend: All members in the region(s) are encouraged to attend the Texas REALTORS® 360 meeting. Members who fall into one or more of the categories below should be specifically invited to participate:

- Texas REALTORS® leadership representatives
- All Local Association Leadership, Directors, and Association Executives
- Field Representative(s)
- Texas REALTORS® Directors
- Texas REALTORS® Regional Vice President(s)
- NAR Directors
- TREPAC Trustee(s)
- Texas REALTORS® Political Involvement Committee member(s)
- TRLP participants
- All Texas REALTORS® and local association Committee Members
- TRIP Trustees

Meeting Content/Purpose

Part I: Industry Issues & Updates – Discussion: This morning program is open for all members and includes a discussion of industry updates & industry transient issues. Part I of this program includes 2 hours of CE and therefore should be *no less than 2 hours* and is designed to be more conversational. This discussion will be led by the pressing needs and issues expressed by the mega region. Texas REALTORS® Leadership is available for start and stop times that work best for your local association. The suggested time for this event is 9 – 11:30 a.m.

Part II: Industry Issues & Updates – Formal Presentation: The second program should run during lunch and is a formal presentation of current industry issues and updates. Please allow 1.5 hours in total for the second program. We ask that the program doesn't conclude later than 2:00pm. The suggested time for this event is Noon – 1:30 p.m., the presentation takes 1 hour.

Additional Activities/Events: Many regions opt to offer an education session of 2 to 4 hours in length with CE credit whenever possible. Texas REALTORS® staff and the host association coordinate the content of this session to best meet local interests and needs. Please do not plan conflicting education sessions against the morning or lunch programs. Please note that leadership plans to arrive around mid-afternoon on the day prior to the day that Part I & Part II are scheduled.

Including additional events is at the discretion of the region but is not required. Possible events the evening before the meeting include, but are not limited to:

- Welcome reception;
- Host leadership dinner;
- Major investor dinner (please note that there are time constraints involved in this possibility);
- TREPAC auction; or
- Regional caucus to discuss local issues.

Event coordination and the expenses associated with additional activities are the responsibility of the meeting hosts (and/or associations in the region). To hold such an event, you may want to consider informing attendees that the event will be a Dutch treat, adding the event to the registration form to collect a fee, or utilizing sponsorships to fund the event. In the absence of an evening event, a dinner for RVPs and Texas REALTORS® leadership may be held.

AV Requirements: Please note that a screen, projector (with HDMI Connector), a sound connection for the presenter's laptop, 5 panel seats (either on a stage/riser or in bar height chairs), 3-5 wireless microphones, (1) 6' table to be offset at the front of the room, and available outlet for a laptop near projector, is required for this meeting. An internet connection is not required. We suggest that you also bring or request back up batteries for the microphones.

It is advised to visit the facility in advance to ensure that the room accommodates the needs of the meeting, ie room size, visibility, adequate space, audio/visual equipment. It is also advisable to arrive early to ensure that the facility has properly set up the space and audio/visual equipment is functional.

Cost/Assistance: The fee to attend the session should be based on the cost of the meeting (meal, taxes, room rental, etc.) and should not be an obstacle for members to attend.

Budget: Up to \$2,500 per mega-region is available for meeting expenses. A request must be submitted in writing along with receipts/invoices no later than 90 days following your event to receive the assistance.

Texas Association of REALTORS® is responsible for travel and hotel expenses for the leadership team representatives, and the Regional Vice President(s). These expenses are not taken from the \$2,500 allotted for meeting expenses. Expenses that exceed the allotted budget must have advance written approval from meeting planning staff.

RVP Roles and Responsibilities: The following are the roles and responsibilities of RVPs as they relate to Texas REALTORS® 360 Meetings:

- Facilitate the discussion to reach a consensus regarding a host and date for the meeting. This date must be approved by all associations in the region. Please make sure to report to Texas REALTORS® Meetings (360meetings@texasrealtors.com); Facilitate a meeting/discussion between all association executives and/or leaders in the region to discuss meeting details and expectations to help with the host association's planning efforts;
- Assist leadership in identifying local issues by reaching out to AEs, Board Presidents, and Field Reps to solicit topics for discussion;
- Reach out to the host association's association executive to offer assistance if needed;
- Assist in fundraising or securing sponsorships to support the cost of the meeting;
- Actively promote meeting attendance to local associations and encourage all members to attend.

Local Association Responsibilities: Local associations are requested to distribute the meeting invitation and/or provide an email list for invitation purposes if being sent by a single entity, support with sponsorships as needed, encourage their members to attend, assist with door prizes if needed, and offer support to the host.

Mega Regional Grouping:

- Region 1
- Regions 2 & 6
- Regions 3, 4, & 12
- Regions 5 & 9
- Regions 7 & 13
- Regions 8 & 15
- Region 14
- Region 11
- Region 16

Questions? Meetings, 512-480-8200 or 360meetings@texasrealtors.com.



Best Practices for a Successful Texas REALTORS® 360 Meeting

Selecting the Venue

- It is best to host the meeting in a central location for all attendees.
- If your region has long travel distances, request a courtesy block from a local hotel. Alternatively, provide a suggested local hotel in your communications with other locals and the Texas REALTORS® Meetings Team.
- You can request attendance history from Texas REALTORS®.

Setting the Schedule, Pricing, Etc.

- Begin your planning as early as possible.
- It is best practice to host the morning session at no cost to attendees, if possible.
- Rely on your region (other local associations and RVPs) to assist with as much as possible including sponsorships, if needed.
- Hold regular check-in/status meetings or keep open, organized communication (via Basecamp, Trello or some other shared platform) with regional representatives (RVPs and local AEs or Presidents.)
- Have discussions about expectations of other local associations covering topics such as:
 - When you plan to open registration;
 - If you will need lists to promote the meeting, keep in mind that Texas REALTORS® posts the event and sets a save the date and registration email to the entire region; and
 - When you will be able to provide current registration lists.

Regarding the Facilities

- Trust the venue to determine its capacity, as they are most familiar with their space. However, consider the presence of Texas REALTORS® representatives and other essential attendees who may not always be included in your registration numbers or may register at a later date (such as staff, sponsors, local leadership, etc.). Set registration deadlines according to the needs of the facility but ask if they are prepared to serve a percentage over your guarantee (industry standard is 3%) that way you will know if you can accept registrations at the door.
 - Request U.S. and Texas Flags for pledges. (Texas Flag always goes on the right when facing the stage.)
 - Make sure the AV is clearly visible in your planned facility. Keep in mind that projector screens are difficult to see in rooms with a great deal of natural light.
 - Request an early set up time and ask to hold a sound check in advance of the start time.
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Texas REALTORS® 360 Meeting Checklist

The following items are required in the planning of a successful regional meeting. Based on an individual meeting format and content, it may be necessary to complete these items in a different order.

- ☐ Review meeting format with regional representatives and local association representatives by mid-way through the prior year.
- ☐ All associations in mega region agree on three potential meeting dates and dates (avoiding dates on the [Three-Year Calendar](#)) are reserved at the host association office or held at an off-site facility, if required.
- ☐ Host association submits meeting date request to 360meetings@texasrealtors.com.
- ☐ Texas REALTORS® Meetings Team coordinates with leadership team to confirm a meeting date.
- ☐ Region representatives (local AEs and RVPs) are notified of date approved by leadership.
- ☐ Host association finalizes contracting with off-site facility (if required). Texas REALTORS® Meeting staff is available to assist with contract review if necessary.
- ☐ Upon confirmation of venue, TEXAS REALTORS® immediately publishes via email the meeting date and location to members in region.
- ☐ At least sixty days in advance, the host association determines registration procedures, fees to be assessed (if any), and develop a registration process (with TEXAS REALTORS® staff, if assistance is requested to process registrations).
- ☐ Registration process is approved by TEXAS REALTORS® staff.
- ☐ Thirty days prior to meeting, REALTORS® distributes via email a flier/registration form to the members in region.
- ☐ Registrations are processed by host association or TEXAS REALTORS®.
- ☐ Texas REALTORS® coordinates with host association overnight accommodations for leadership/staff.
- ☐ At least fifteen days prior to meeting, the role of all meeting participants to be confirmed. Texas REALTORS® develops a meeting agenda to be distributed to Texas REALTORS® officers and local leadership.
- ☐ At least fifteen days prior to meeting, Texas REALTORS® forwards bios on all Texas REALTORS® speakers to the host association and confirm meeting roles (opening remarks, leadership/RVP intros, pledges, etc.)
- ☐ Ten days prior to meeting, host association to confirm all final arrangements with off-site facility.

On-Site Facilitation Checklist for Host Association

- ☐ Coordination of room set-up / F & B (if any) with facility.
- ☐ Copy meeting agenda for all participants, if necessary.
- ☐ Confirm that bios on all speakers are in-hand.
- ☐ Staffing of registration.
- ☐ Establish a CE monitor.
- ☐ Put together an on-site supply box including blank registration forms (or a way to collect registration), petty cash, pens, pencils, Sharpie, stapler, paperclips, tape, scissors, extra microphone batteries, etc.

Post Event Check List for Host Association

- ☐ Local host reports final attendance totals to Texas REALTORS®.
- ☐ If requesting a stipend, the local host submits receipts no more than 90 days after the event.