



A F F I L I A T E B U S I N E S S P A R T N E R S

Guidelines & Procedures

Updated July 2021

Mission Statement

As Affiliates of the Pinellas REALTOR® Organization and Central Pasco REALTOR® Organization, our mission is to work together with the REALTOR® members to provide products and services that add value to all its members. We will focus on building relationships and supporting the community through education, events, and charitable activities that promote more success in our industry.



New Affiliate Member Checklist

To maximize your membership, the following items should be completed within 60 days of becoming an Affiliate Business Partner.

AFFILIATE ORIENTATION

Attend an Orientation session held prior to the first Affiliate Meeting of each month. These meetings begin at 9:00 a.m. and are held at the Pinellas REALTOR® Organization. A virtual option is available. *(THIS IS MANDATORY WITHIN 60 DAYS OF JOINING)*

MEET WITH A MENTOR

Once you've completed Orientation, a Mentor will be assigned to you. They will contact you to set up a meeting or phone call to review membership benefits and discuss any questions you may have.

BUSINESS CARDS

Place your business cards in ONE slot on the Affiliate Wall.

AD ON THE TV SCREENS

Email the Affiliate Liaison the following item(s):

- a. An ad in JPG format, size 1920 pixels wide x 1080 pixels high

OR

- a. Your company's logo in the highest resolution possible
- b. Your company's tagline OR a short sentence describing the services your company offers
- c. The contact information you want displayed

CONNECT NETWORKING EVENTS

Start attending the monthly Connect events – get your name out there and let people get to know you so they feel comfortable referring your business!

2021 Affiliate Board



Dylan Barrie, Rock's Moving Co.

Chairman

727.643.1364 | DylanBarrie67@gmail.com



Tina Housdan, All Western Mortgage

Vice Chair

813.351.9965 | THousdan@allwestern.com



John Barcelo, Valucentric

Past Chairman

813.817.6382 | JBarcelo@valucentric.com



Samantha McDermott, IBERIABANK

Membership

727.201.5533 | Samantha.McDermott@iberiabank.com



Kim Bauer, 1-800-GOT-JUNK

Community Outreach

727.743.4458 | Kim.Bauer@1800gotjunk.com



John Ricker, Baxter Title

Treasurer

727.743.2965 | John@baxtertitle.com



Tara Birchfield, Home Solution Title

Secretary

678.409.0346 | tara@hstitle.net



Rick Haupricht, GreenLeaf Title

Membership

727.409.3277 | Rick@greenleaftitle.com



Pat Stobie, Total Title Solutions

Membership

727.422.3124 | Pat.Stobie@mytotaltitle.com



Joshua Sandon, Sandon Mortgage Group

CPRO Liaison

727.503.9588 | JoshuaSandon@openmtg.com

2021 Affiliate Mentor Team



Denee Doud, Peace of Mind Home Inspections **Mentor**

727.944.1117 | Denee@inspectpom.com



Michael Luedtke, Skyline Inspections **Mentor**

765.404.6810 | MaLuedtk@gmail.com



Chris Raia, Suncoast Credit Union **Mentor**

813.621.7511 | CJRaia@yahoo.com



Debbie Trowbridge, Amerifirst Home Mortgage **Mentor**

727.455.6914 | DTrowbridge@amerifirst.com

Staff Support



AFFILIATE LIAISON :

Kim Simmons **VP of Communications & Affiliate Relations**

4590 Ulmerton Rd. | Clearwater, FL 33762

727.216.3034 | KSimmons@pinellasrealtor.org

AFFILIATE GUIDELINES AND PROCEDURES

Established February 20, 2013

Amended July 2021

1. AFFILIATE ORIENTATION:

It is mandatory that Affiliates attend an Orientation within 60 days of joining. The schedule of Orientations is available at <https://pinellasrealtoraffiliates.com/affiliate-meetings/> Once Orientation has been completed, an Affiliate Mentor will be assigned to the new member.

2. AFFILIATE MENTOR:

Once the Affiliate member has completed an Affiliate Orientation session, they will be assigned an Affiliate Mentor. Mentors are responsible for teaching the new member the ropes of the Affiliate Program, help them to understand about building relationships with fellow members, and help them learn about bringing value to REALTORS®. Once the new member has met with their Mentor, a name badge will be ordered for them.

3. BUSINESS CARDS:

Affiliates' business cards can be placed on the Affiliate Walls at PRO and CPRO as soon as they are in the membership database and have received the welcome email from the Affiliate Liaison. Do not rearrange the cards and do not place your cards in more than one slot.

4. HOSTING AN EVENT/CLASS AT PRO:

PRO/CPRO reserves the right to deny any Affiliate member the opportunity to host or teach a class at PRO. Affiliate members interested in hosting or teaching a class at PRO have three options:

1. Avoid the room rental fee, have staff promote it to the membership and facilitate registrations – you may not promote your company, products, or services during your class. Your company name will be mentioned in the event description on the registration page. Contact Angela Emerson (aemerson@pinellasrealtor.org) to coordinate it. She will determine if it is something that would be a benefit to our members. If you would like to choose up to 2 Affiliate Members to 'sponsor' your class, you may do so. You must notify Angela at least one week prior to your class of who the sponsor(s) is/are. You all will be responsible for room clean-up once the event has concluded.

2. Same as #1, but if you would like a sponsor and don't have anyone in mind, the Affiliate Liaison will facilitate a drawing either via email or at an Affiliate Meeting. There will be a fee associated with the sponsorship.

Affiliates may only host/teach classes 4 times per year, spaced at least 3 months apart.

3. Pay the room rental fee, you are responsible for handling promotion and registration – you MAY promote your company, products, or services during your event. Contact Diana Katz (727-216-3009 or DKatz@pinellasrealtor.org) to book and pay for the room. PRO will NOT promote your rental class.

NOTE: The sponsor(s) chosen by the Affiliate hosting the class MUST be a paid Affiliate Member of PRO/CPRO. Sponsors are not permitted to distribute marketing materials on the tables inside the classroom. Sponsors will have up to 3 minutes of speaking time prior to the class start time. The Affiliate hosting the event is not permitted to charge the sponsor a fee.

5. BANNERS ON SITE:

Roll-up/freestanding banners are NOT allowed at either facility, including the classroom, auditorium and atrium spaces. Table top signs and other marketing collateral are allowed when you sponsor a class or event, but not standalone banners.

6. NEW MEMBER WELCOME (NMW) SPONSORSHIPS at PRO:

NMW sponsors must arrive at PRO by 7:45 a.m. Sponsors must remove their marketing materials from their table when they leave PRO that day.

7. 'CONNECT' SOCIAL EVENTS:

No hard-selling will be permitted during Connect events. Children are not permitted at Connect events. Blanket passing out of business cards is not permitted. The promotion of other networking groups is not permitted. If you have dual membership (REALTOR® and Affiliate) you must represent yourself as one or the other, not both. Non-members may attend ONE Connect event prior to joining.

Each event will have one host who must be at the venue with their marketing materials placed on the check-in table by 4:45 p.m. The host is responsible for purchasing one drink for each of the 5 REALTORS® whose business card is drawn. 5 business cards will be randomly drawn between 5:45 p.m. and 6:00 p.m. and those REALTORS® whose cards are drawn will receive the drink. The host is also responsible for greeting and checking-in event attendees. They may put up a pop-up banner stand. Each event will have up to three sponsors who will pay \$50 each. Each sponsor will be able to place one item of marketing material (pens or brochures or other giveaway type items etc.) on the designated sponsor table, and may put up a pop-up banner stand. To be a host or sponsor, the Affiliate member must have completed Affiliate Orientation.

8. ADS ON THE TV SCREENS AT PRO AND CPRO:

To place an ad on the TV screens at PRO and CPRO, Affiliate members must email the Affiliate Liaison their ad in JPG format, size 1920 pixels wide x 1080 pixels high. If the member cannot provide an ad, they can email the Affiliate Liaison their company logo, their company tagline OR a short sentence describing the services the company offers, and the contact information of the Affiliate member. The Affiliate Liaison will insert the ad onto the TVs within 10 business days of receiving the ad.

9. AFFILIATE MEETINGS:

Non-members may attend ONE meeting prior to joining. Introductions consist of each attendee stating their name and company name. If an attendee wishes to say their tagline, they may do so for a \$5 minimum donation to that quarter's charity. Networking may be done prior to the meeting at 10:00 a.m. and may continue after the meeting adjourns. Affiliate members may not promote any upcoming events of their own during the meetings. Testimonials may only be given for fellow Affiliates or REALTOR® members and it must be related to business.

Three Affiliate Members per first meeting of the month will have the opportunity to sit on that month's Affiliate Expert Panel. The topic will be chosen in advance, and the Affiliate Liaison will put the call out for panelists via email. Two Affiliate Members per second meeting of the month will have the opportunity to make a 5-minute presentation with a PowerPoint. PowerPoint presentations must be emailed to the Affiliate Liaison at least 3 days prior to the Affiliate Meeting. Affiliate Members who are interested in making a presentation must email the Affiliate Liaison.

10. NAME TAGS:

Affiliate branded name tags are ordered once per month for those Affiliates who have met with their Mentor. Name badges will not be mailed out to members. Name badges may be picked up at the PRO office during business hours. Affiliate branded name tags must be worn during meetings, Connect events, and when sponsoring classes or events. Affiliate members must be mindful that while wearing the name tag they are representing the association and the Affiliate Program and must conduct themselves with the highest standards possible. If a member switches companies and would like a replacement badge, they must request one from the Affiliate Liaison. If a Primary Affiliate Member leaves a company, the new person taking their place will NOT automatically receive a name tag. They must order one and pay the \$20 fee. Additional tags or replacements may be purchased for \$20. Contact the Affiliate Liaison to order.

11. MAJOR EVENTS SPONSOR TABLES:

During major events (Affiliate Expo, Wine & Food Festival, etc.) various types of tables will be available for sponsorship, each with different pricing. Affiliate members may only use the type of table they paid for. They are not permitted to use a

different type of table, or additional tables. When tables are being raffled off, only one business card per company membership may be submitted. Those selected to sponsor must be present when their business card is drawn.

12. AFFILIATES SPONSORING LIVE CLASSES/EVENTS:

A maximum of two paid Affiliate members of PRO/CPRO may attend sponsorships. For example, company XYZ Bank has two Affiliate members – Jack and Nancy. Jack signs up to sponsor a class at PRO. On the day of the sponsorship, Jack, Nancy and Bill from XYZ Bank show up. Since Bill is not a member, he must either leave or submit an application that day. Only one paid Affiliate member may speak during their sponsorship. Affiliate sponsors must have their table completely set up 30 minutes prior to the class start time. Affiliate sponsors are not permitted to distribute marketing materials on the tables inside the classroom.

13. AFFILIATES ATTENDING CLASSES AT PRO

Affiliates may attend all classes offered by PRO/CPRO. If there is a fee to attend, you must pay and register using your ID and password. If you need this info, you must email the Affiliate Liaison. Keep in mind that you are attending the class to learn, not to promote yourself or your company. During breaks you may not hand out business cards or solicit. You may not wear your Affiliate or company name badge to the class. Those who violate this guideline will not be permitted to attend classes until further notice.

14. COMPLIMENTARY MEETING ROOM USAGE AT PRO: (NOT CURRENTLY APPLICABLE)

Affiliate members may use the Board Room and any of the two Conference Rooms at PRO to conduct company business between 8:30 a.m. and 5:00 p.m., Monday through Friday. Rooms are not to be used for personal reasons. Rooms must be reserved with Diana Katz (727-216-3005 or DKatz@pinellasrealtor.org). There is a 2 hour maximum on utilizing the room space. Usage over 2 hours will result in an hourly fee, in addition to an attendant and janitorial fee (if applicable). When reserving a room Affiliate members must inform her that they are an Affiliate member.

15. AFFILIATE WEBSITE:

All Affiliate members will get a complimentary listing on PinellasRealtorAffiliates.com, which is linked from the association's main website. Listings include first and last name, company name, address, email address, phone number, website, and logo. After joining, you must email your logo to the Affiliate Liaison in order for your logo to be placed in your listing. Listing information comes directly from the membership application that you filled out. Any edits requested must be submitted via email to the Affiliate Liaison.

You may enhance your listing by utilizing images, video, a biography, testimonials, or an ad. All of these items are available to you for additional fees. Contact the Affiliate Liaison for more information.

16. CHANGING COMPANIES OR LEAVING PRO/CPRO:

If an Affiliate member leaves the company they are with, they must notify the Affiliate Liaison in writing. If an Affiliate member leaves the company they are with, then joins a company that also has Affiliate membership, they must fill out the application and pay the \$60 membership dues, as Secondary Affiliate Membership is not transferrable.

17. REPLACING THE PRIMARY AFFILIATE MEMBER:

The Primary Affiliate Member may be replaced free of charge if the company paid for the initial membership. To replace a Primary Affiliate Member, this form must be filled out and submitted: <http://form.jotformpro.com/form/23025978841965> The Affiliate Liaison will email the new Primary Affiliate Member a confirmation once PRO/CPRO has updated their records. The new Primary Affiliate Member must attend an Orientation and meet with an Affiliate Mentor to obtain a name badge.

18. FAMILY CONNECT MEMBERSHIP

If an Affiliate Member loses their job, they may apply to be an Affiliate 'Family Connect' member. They must submit the application and \$25 fee to the Affiliate Liaison. They may remain a Family Connect member for up to 12 months. Family Connect members are permitted to attend Affiliate Meetings and Connect events.

PINELLAS REALTOR® ORGANIZATION AFFILIATE CODE OF ETHICS
Effective January 1, 2015

Affiliates are zealous to maintain and improve the standards of their calling and share with their fellow Affiliates a common responsibility for the Affiliate Program's integrity and honor. The Affiliates have expended significant time, energy, and expense creating an Affiliate Program that is respected on a local, state, and national level, and the Affiliates desire to maintain and protect the public's confidence in the Affiliate Program and the Affiliates.

In order to eliminate practices that could damage the public or otherwise discredit or bring dishonor to the Affiliate Program, the Affiliates have agreed to adopt and enforce this Code of Ethics.

The term Affiliate has come to connote respect. In all professional functions, an Affiliate should be competent, prompt, diligent, and respectful to others.

Section 1 – Opinions Regarding Competitors

Affiliates should not attempt to gain any unfair advantage over their competitors, and all Affiliates shall refrain from making unsolicited comments about other practitioners. In instances where an Affiliates' opinion is sought, or where an Affiliate believe that comment is necessary, any opinion shall be offered in an objective, professional manner, and shall be uninfluenced by any personal motivation or potential advantage or gain.

Section 2 - Honesty

Affiliates remain obliged to treat all parties honestly. The behavior of each Affiliate is a reflection on all of the Affiliates, and each Affiliate should ensure that he/she does not mislead clients and customers as to savings or other benefits that might be realized through use of the Affiliate's services.

Affiliates shall be honest and truthful in their communications and shall present a true picture in their advertising, marketing, and other representations.

The obligation to present a true picture in advertising, marketing, and representations allows Affiliates to use and display only professional licenses, certifications, and other credentials to which they are legitimately entitled.

Section 3 - Confidentiality

The obligation of Affiliates to preserve confidential information provided by their clients continues after termination of any professional relationship between the Affiliate and the client. Affiliates shall not knowingly, during or following the termination of professional relationships with their clients:

1. reveal confidential information of clients; or
2. use confidential information of clients to the disadvantage of the client; or
3. use confidential information of clients for the REALTOR®'s advantage or the advantage of third parties unless:
 - a. clients consent after full disclosure; or
 - b. Affiliates are required by court order; or
 - c. it is the intention of a client to commit a crime and the information is necessary to prevent the crime; or
 - d. it is necessary to defend an Affiliate or Affiliate's employees or associates against an accusation of wrongful conduct.

Section 4 – Disclosures

Affiliates shall only be obligated to discover and disclose adverse factors reasonably apparent to someone with expertise in those areas.

Affiliates shall avoid exaggeration, misrepresentation, or concealment of pertinent facts relating to the property or the transaction.

Affiliates shall not undertake to provide professional services concerning products or services or its value where they have a present or contemplated interest unless such interest is specifically disclosed to all affected parties.

Section 5 – Relationships Between/Among Affiliates

Affiliates shall cooperate with other Affiliates except when cooperation is not in the customer or client's best interest. The obligation to cooperate does not include the obligation to share commissions, fees, or to otherwise compensate another Affiliate. Moreover, each Affiliate is required to understand any laws, rules or regulations regarding sharing of commissions, fees, or otherwise compensating another party for a referral, and all Affiliates shall abide by those laws, rules or regulations.

Section 6 – Services to Third Parties or REALTOR® Members

Affiliates shall not deny equal professional services to any person for reasons of race, color, religion, sex, handicap, familial status, national origin, or sexual orientation. Affiliates shall not be parties to any plan or agreement to discriminate against a person or persons on the basis of race, color, religion, sex, handicap, familial status, national origin or sexual orientation.

Affiliates shall not undertake to provide specialized professional services concerning a type of service that is outside their field of competence unless they engage the assistance of one who is competent on such types of service, or unless the facts are fully disclosed to the client. Any persons engaged to provide such assistance shall be so identified to the client and their contribution to the assignment should be set forth.

Each Affiliate shall refrain from providing professional services requiring licensure if the Affiliate is not properly licensed to provide said professional services. Affiliates may retain a properly licensed individual to provide services to a customer or client, but must fully disclose to the customer/client that a third party will be providing the services for which a license is required.

Affiliates must exercise care and candor in any advertising or other public or private representations so that any party interested in receiving or otherwise benefiting from the Affiliate's offer will have clear, thorough, advance understanding of all the terms and conditions of the offer. The offering of any inducement to do business is subject to the limitations and restrictions of state law and the ethical obligations established by any applicable Standard of Practice.

Section 7 – Disciplinary Proceedings

If an Affiliate is accused of an unethical practice or asked to present evidence or to cooperate in any other way, in any professional standards proceeding or investigation, Affiliates shall place all pertinent facts before the Committee in which membership is held and shall take no action to disrupt or obstruct such processes.

Affiliates shall not make any unauthorized disclosure or dissemination of the allegations, findings, or decision developed in connection with an ethics hearing or appeal or in connection with an arbitration hearing or procedural review.

Affiliates shall not obstruct the Committee's investigative or professional standards proceedings by instituting or threatening to institute actions for libel, slander or defamation against any party to a professional standards proceeding or their witnesses based on the filing of an arbitration request, an ethics complaint, or testimony given before any tribunal.

Affiliates shall not intentionally impede the Committee's investigative or disciplinary proceedings by filing multiple ethics complaints based on the same event or transaction.