

# **MARKETING SESSION & TOUR POLICY**

Approved by Board of Directors  
Revised April 2013

## **STATEMENT OF TASK FORCE PURPOSE**

This Task Force was created by request of the Board of Directors on December 8, 2005, to recommend common ground rules and policies for all NSDCAR caravans, tours and pitch sessions while still allowing for local differences in format.

## **STATEMENT OF CARAVAN PURPOSE**

Caravans, Tours and/or Pitch Sessions are an activity of the North San Diego County Association of REALTORS® for the express purpose of providing an opportunity for our REALTOR® members to preview new listings on the market so they may better serve the needs and interests of their buyers and sellers and to network with one another.

## **OPERATING POLICIES**

The following policies are adopted by the Board of Directors and apply to all NSDCAR marketing sessions, caravans and tours. Other practices not inconsistent with these policies are left to the discretion, decision and supervision of the respective Coordinating Committee (CC).

### **1. AUTHORITY**

The authority to design and run the local caravans/tours/pitch sessions, within the parameters of Association policies, protocols, rules and guidelines, has been delegated to the respective CC as stated in the District Coordinating Committee Guidelines. Each caravan area is governed by the zip codes assigned to the respective Coordinating Committee. The caravans, tours and/or pitch sessions are also subject to Sandicor Rules and Regulations, the REALTOR® Code of Ethics, and all applicable laws.

### **2. PROMOTIONAL EFFORTS**

- To protect the interest of all concerned, any flyers or other promotional pieces and/or any representations about or on behalf of the Association or any of its sub-groups must be reviewed and approved by the CEO or her designee at least 10 days prior to any form of distribution.

### **3. ATTENDANCE & PARTICIPATION**

- In the spirit of professional courtesy and cooperation, REALTOR® members of other associations are welcome to attend under the same rules that govern NSDCAR member participants.
- Associated Professional and Affiliate members of NSDCAR are also allowed to attend marketing sessions, caravans and tours for networking purposes. (See also General Marketing section below.)
- Only REALTORS®, Associated Professionals, NSDCAR Affiliates, and MLS-Only agents may tour the properties. Members of the public, including clients, family and friends of agents, are specifically prohibited from touring the properties during the caravan, tour or open house. (See also item 7 bullet #6)
- Individuals who are not NSDCAR members but who qualify for Associated Professional or Affiliate Member of NSDCAR are welcome to visit the pitch session only and on a one-time preview basis. No visitor, however, may sponsor any part of the event or in any way promote himself, his company, his product or his service. Such individuals will be invited to join NSDCAR at the appropriate membership level and must do so before returning.

### **4. PROPERTIES PITCHED OR VIEWED**

- Agents may PITCH a listing that is under contract with a documented Sellers Instruction to Exclude Listing from the Multiple Listing Service (SEL) or Sandicor's Authorization to Exclude Listing. The Exclusion does need to be sent into NSDCAR within 48 hours of the signing of the listing contract, per Sandicor Rules and Regulations.

- The primary focus of listings pitched at the Coordinating Committee's marketing session is listings in the zip codes assigned to each Coordinating Committee. Listings in other District areas may be pitched time permitting and at the discretion of the Caravan Captain.
- If the listing agent is unable to be present to pitch or hold the property open, another REALTOR® may serve as substitute for the listing agent upon notice to the marketing session's Master of Ceremonies at the beginning of the marketing session. Associated Professional and Affiliate Members may not pitch a listing or rental property, or host a property on behalf of the agent.

## 5. FEES & FINES

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|---|-----------|
| • REALTOR® submitted properties to caravan, tour or pitch                         | No charge |
| • MLS-Only agent submitted properties to caravan, tour or pitch, per listing      | \$ 40     |
| Staff reviews the list of properties on caravan or tour and bills these agents.   |           |
| • No Show for a scheduled caravan, tour or pitch, per listing, for first offense. | \$ 40     |
| For each subsequent offense in the same calendar year.                            | \$100     |

## 6. HANDLING OF MONIES

### A. Charitable Contributions:

- Any monies collected for charitable contribution must be voluntary and must be submitted to NSDCAR for accounting and eventual distribution as determined by the appropriate CC.
- Any monies collected for a specifically announced recipient or purpose must go to the intended recipient/purpose. No change in named recipient may be made retroactively.
- Any charity chosen as a recipient of donations must be approved by the CC prior to announcement to caravan attendees. CC's are cautioned to assure that any charity named is not working in opposition to any NSDCAR policy or position.
- All prize drawings must be conducted before the event is begun or after adjournment, not during the meeting.
- No representation should be made about the tax deductibility of any contribution.
- Any monies collected are to be placed in an envelope provided by the Association and labeled as indicated on the envelope face and are to be turned in to the Vista Administrative Offices or the local Service Center, if applicable, no later than 6 calendar days after the date of collection, but preferably on the day collected.

### B. Event Related Costs

- In the interest of prudent business practice and maintaining the best possible relationship with the venues used for marketing sessions, contracts are to be negotiated and executed only by appropriate NSDCAR staff, although the CC or its caravan committee is welcome to seek preliminary information about a desired venue and to relay that information to staff.
- Additional service requests are not to be requested of the venue.
- Monies pledged or collected for venue expenses are to be submitted to NSDCAR in a timely manner. NSDCAR staff will handle accounting of these monies and will remit the appropriate payment to the venue on behalf of the caravan.
- The DCC is responsible for seeing that sponsor pledges are kept current.

## 7. GENERAL MARKETING SESSION, CARAVAN & TOUR RULES

- Each agent is wholly responsible for assuring that permission has been obtained from the seller to have the property marketed in this manner.
- Announcement priority is NSDCAR events and information. Other REALTOR® supported events may be announced time permitting and at local caravan captain discretion.
- No politics zone. Personal opinions on NSDCAR political or controversial issues are not allowed at marketing sessions. If an issue requires debate, a forum may be requested of the Coordinating Committee to present both sides of an issue.
- No alcohol may be served at any property on caravan or tour.

- New construction may be included on caravan or tour only if the property is currently active in the MLS, construction has been completed, and the property is free of construction debris.
- If the listing agent is unable to be present to pitch or hold the property open, another REALTOR® may serve as substitute for the listing agent upon notice to the marketing session's Master of Ceremonies at the beginning of the marketing session. Associated Professional and Affiliate Members may not pitch a listing or rental property, or host a property on behalf of the agent.
- Clients who are prospective purchasers may not accompany the agent on the caravan or tour or meet the agent at any property on tour or caravan. (See also item 3 bullet #3)
- Business cards collected at the marketing sessions may only be used for the purpose intended, that being for raffles and association administrative purposes, and are to be turned in to the association on the day of the marketing session. Business cards are specifically not to be copied and/or compiled for personal or business firm use.

## 8. SPONSORSHIP & PRIZES

Sponsorship of the venue, refreshments, door prizes or any other event-related service may be supplied only by REALTOR members or their firm or by Associated Professional or Affiliate members of NSDCAR. No one may substitute or serve as proxy for a sponsor unless that individual is also a member of NSDCAR.

## 9. TECHNOLOGY APPLICATIONS EMPLOYED

The following policies, in addition to all policies above, apply to any Member (REALTOR, Associated Professional, or Affiliate) or third party vendor who supplies any technological service or application for any NSDCAR Marketing Session, caravan or tour. This includes, but is not limited to, PowerPoint presentations, web sites, e-mailed announcements, or other applications:

### A. PowerPoint Presentations at Marketing/Pitch Sessions:

#### (1) Source of Information:

- Individual agents are to request that their listing(s) be included. They are not automatically included or pulled from the MLS.
- Only listings scheduled for that week's caravan or tour may be included on the PowerPoint presentation.

#### (2) Submitting Requests

NSDCAR will provide a mailbox for each Tour (example: 701tour@nsdcar.com) as a clearinghouse for the receipt of requests and will automatically forward those to the appropriate tour's PowerPoint provider.

#### (3) Display Template

A master template will be provided by NSDCAR for the display of listings and for sponsor promotion. Additional slides, if any, to be included in the PowerPoint presentation are to be submitted to NSDCAR staff for review before display.

### B. Internet Applications, including but not limited to websites containing caravan/tour information and/or e-mailing of caravan, tour or marketing session, are permitted only through NSDCAR or an Association authorized provider of such services.