

Candidate and Issue Training In-Person Training

Sample Agenda & Learning Objectives

In-Person Class Goals and Learning Outcomes:

At the end of the **in-person course**, participants will be able to:

1. Judge how to rate candidates in relation to the goals of the association.
Demonstrate a working knowledge of the resources available for members who are running for office.
2. Demonstrate a working knowledge of campaign management, including tactics, timelines, and costs.
3. Determine when and how to mobilize their members in advocacy campaigns or in support of a candidate.
4. Map a course to prepare and apply for issue mobilization grants and independent expenditure funds.
5. Develop multi-year issue and/or candidate advocacy plans for their association.
6. Summarize the timelines and requirements to utilize NAR resources.
7. Identify legislative trends and how to best lobby on them with elected officials.
8. Understand the basics of the legal and compliance requirements surrounding campaign and legislative advocacy campaigns.

Candidate and Issue Campaign Training Agenda (1.5-Day, In-Person Course)

April 10, 2019

Day 1 – Candidate Focused

8:00 – 8:30 am Breakfast

8:30 – 9:30am Ice Breaker and Overview

Review of the training objectives of the in-person training and the material covered in the webinars.

9:30-10:15 am Presentation: Creating Multi-Year Advocacy Plans

Learn why it is necessary to create a multi-year advocacy plan and how to create objectives, timelines, and evaluate candidates to meet your goals.

10:15-11:15 am Breakout #1

Groups will use information provided to them in the campaign scenario to begin developing their advocacy plan by creating a plan outline and begin filling out a

2-year calendar that includes session or city council meeting dates; important election dates; and dates for internal committees to meet and make key decisions.

11:15 am-12:00 noon Presentation: Best Practices for Choosing REALTOR® Champions

Integrating the best practices from the REALTOR® Champions course with a long-term advocacy plan.

12:00 -1:00 pm Working Lunch Presentation: Campaign Tactics Overview Part 1

A discussion of the pluses and minuses of direct mail, phones, online, and field work in campaigns and advocacy campaigns. Parameters of timelines necessary for effective implementation will be discussed.

1:00-2:00 pm Breakout # 2

Groups will create a candidate support grid and decide on levels of support for all candidates in campaign scenario.

2:30-2:45 pm Review of How to Apply for Independent Expenditure Allocation & Best Practices for Using One

A review of the how to apply for independent expenditure funds, timeline for approval, and best practices on timelines necessary for campaign tools to be effectively developed and implemented.

2:45 – 3:30 pm Presentation: Recruiting REALTOR® Candidates and Using the Candidate Training Academy

A discussion of how to talk with REALTOR® members about running for office, the pluses and minuses of candidacy, and the resources available to assist them.

3:30-4:45 pm Breakout #3

Fill out IE applications for all applicable candidates. Develop a presentation on your decision-making on the levels of support you are providing each candidate.

4:30-5:30 pm Group presentations on the electoral activity portion of their advocacy plan

April 11, 2019

Day 2 – Issue Focused

8:00-9:00 am Breakfast Presentation: State and Local Issues Trends

A discussion of issues impacting REALTORS® both positively and negatively.

- 9:00-10:00 am** **Review of Applying for Issues Mobilization Grants and Tactics Available for Use**
A review of the how to apply for issue mobilization grants, timeline for approval, and best practices on timelines necessary for campaign tools to be effectively developed and implemented and when to use them.
- 10:00-10:45 am** **Compliance and Legal Requirements for Independent Expenditure and Advocacy Campaigns**
An expert on campaign and advocacy compliance will go over the basics of what an association should understand when running an advocacy, ballot measure, or independent expenditure campaign.
- 10:45-12:00 noon** **Breakout #4**
Based on election results, determine your legislative priorities—go on the offense or the defense for city council or legislative session-start determining key targets.
- 12:00-1:00 pm** **Lunch Presentation: Integrating Campaign Support and Legislative Advocacy**
- 1:00-1:30 pm** **Breakout #5**
- 1:30-2:15 pm** **Advocacy Plan Presentations**
Each group will present their 2-year advocacy plans, by reviewing their election strategy, the election results, and their legislative advocacy plan, including their issue mobilization application. Be sure to talk through how you had to pivot based on election results and why you made some of the budgeting decisions you did.
- 2:15 – 2:30 pm** **NAR Wrap Up with Q & A**
Any final questions about NAR process now that you have gone through the full 18-month campaign simulation? NAR Campaign Services Staff is here to help!