

2026 ASSOCIATION EXECUTIVE TOOLKIT



MICHIGAN
REALTORS®

720 NORTH WASHINGTON AVE

MICHIGAN REALTORS®

"We are the recognized public policy and legal advocate for private property rights, as well as the acknowledged leading resource for professional development, knowledge exchange, and wide-ranging business services."

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NAR QUICK CONTACTS & INFO

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Advocacy	202-383-1000
Association Leadership Development	312-329-8304
Business Communications & Publishing/Realtor® Magazine	312-329-8458
Commercial & Global Services	312-329-8284
Communications	202-383-7515
E-commerce	800-868-3225
Leadership Resources	312-329-8540
Library & Archives	800-874-6500
M1	800-868-3225
Media Communications	202-383-1042
Meetings & Events	312-329-8312
Member Experience	312-329-8399
Member Support	800-874-6500
NAR REALTOR Benefits®	800-627-5233
Realtor® Party	202-383-1000
Realtors® Political Action Committee (RPAC)	202-383-1029
Realtor® Store	800-874-6500 x1
Research	202-383-1060
Talent Development & Resources	312-329-8231

Individual staff member contact information is available through Member Support at 800-874-6500 or by email at ContactNAR@nar.realtor.

CHECKLIST FOR NEW ASSOCIATION EXECUTIVES

Ensure setup in NAR's central membership database Realtors® M1.

- Obtain personal M1 identification number.
- Assistance is available from NAR's M1 Ecommerce Support Team.

Establish account on NAR's The Hub.

- Access resources, updates, and professional development opportunities.
- Engage with relevant AE Hub communities.

Access NAR's Core Standards resources.

- Review association's Core Standards Certification Form.
- Contact state association for deadlines and guidance.
- Direct questions to NAR's Member Experience Team.

Study association's bylaws.

Secure association financial records.

- Ensure safety of documents, audits, and tax returns.

Review association's financial policies.

- Ensure proper signatory and contact information.
- Update insurance provider.

Learn association's supplementary policies and procedures.

- Review employee manual thoroughly.

Meet with accountant/bookkeeper (if applicable).

- Discuss roles and responsibilities.
- Address tax-related matters.
- Establish protocols for handling money.
- Consider financial audit if necessary.

Meet with president.

- Review roles and responsibilities.

Meet with board of directors and executive committee members individually.

Meet with treasurer to review budget.

For local AEs: Contact state association.

- Introduce yourself and update information.
- Inquire about important dates and contacts.

Identify and organize association's vendors, contacts, and contracts.

- Contact existing vendors for introductions and updates.

Locate association's Articles of Incorporation.

- Verify status with Secretary of State.

Learn association's membership policies.

- Understand dues, assessments, membership types, etc.

Understand association's professional standards manual.

- Identify certified professional standards administrator.

Review M1 User Manual.

Learn about RPAC.

- Review fundraising resources.
- Understand PAC management laws.

Introduce yourself to neighboring Realtor® associations.

Review NAR's conference schedule and plan for AE Institute attendance.

- Premier professional development event for Realtor® association staff.

Dive deeper into association's dues policies.

- Understand state and NAR dues policies.
- Obtain required disclosures and learn dues transmission process.

Understand Three-Way Agreement between local, state, and national association.

Establish understanding of association's budget.

- Comprehend budget process, revenue sources, and expenses.
- Differentiate expenses requiring Board approval.

Learn about NAR's Errors and Omissions (E&O) Insurance.

- Understand coverage requirements and contact information.
- Discuss additional coverage options with Board.

Check certification dates of association's bylaws and MLS Rules.

Read NAR's Code of Ethics and Standards of Practice.

Understand association's new member orientation program.

- Ensure compliance with NAR requirements and bylaws timeframe.

Learn association's role in local legislative initiatives.

- Get acquainted with local government figures.
- Introduce yourself to housing or DEI departments for potential collaboration.

Assess association's strategic plan.

- Update completed goals and adjust priorities with leadership.
- Utilize Strategic Planning Resources Toolkit if needed.

Learn basic real estate practices.

- Subscribe to industry publications.
- Cover topics such as MLS issues, terminology, forms, etc.

DUES CYCLE DEADLINES

NAR DUES CYCLE

PURPOSE

National dues of each Realtor® member, Realtor® Associate, Institute Affiliate, and Affiliate members shall pay dues to their primary Board annually in advance in accordance with the Bylaws of the Member's primary Board.

POLICY

Article X – Dues and Assessments

Section 2. Dues. The annual dues of members shall be as follows. (a) Realtor® Members. The annual dues of each designated Realtor® member shall be in such amount as established annually by the board of directors, plus an additional amount to be established annually by the board of directors times the number of real estate salespersons and licensed or certified appraisers who (1) are employed by or affiliated as independent contractors, or who are otherwise directly or indirectly licensed with such Realtor® member, and (2) are not Realtor® members of any association in the state or a state contiguous thereto or Institute Affiliate members of the association. In calculating the dues payable to the association by a designated Realtor® member, non-member licensees as defined in (1) and (2) of this paragraph shall not be included in the computation of dues if the designated Realtor® has paid dues based on said non-member licensees in another association in the state or a state contiguous thereto, provided the designated Realtor® notifies the association in writing of the identity of the association to which dues have been remitted. In the case of a designated Realtor® member in a firm, partnership, or corporation whose business activity is substantially all commercial, any assessments for non-member licensees shall be limited to licensees affiliated with the designated Realtor® (as defined in (1) and (2) of this paragraph) in the office where the designated Realtor® holds membership, and any other offices of the firm located within the jurisdiction of this association. (Amended 1/05)

(1) For the purpose of this section, a Realtor® member of a Member Board shall be held to be any member who has a place or places of business within the state or a state contiguous thereto and who, as a principal, partner, corporate officer, or branch office manager of a real estate firm, partnership, or corporation, is actively engaged in the real estate profession as defined in Article III, Section 1 of the Constitution of the NATIONAL ASSOCIATION OF Realtors®. An individual shall be deemed to be licensed with a Realtor® if the license of the individual is held by the Realtor®, or by any broker who is licensed with the Realtor®, or by any entity in which the Realtor® has a direct or indirect ownership interest and which is engaged in other aspects of the real estate business (except as provided for in Section 2(a)(1) hereof) provided that such licensee is not otherwise included in the computation of dues payable by the principal, partner, corporate officer, or branch office manager of the entity.

A Realtor® with a direct or indirect ownership interest in an entity engaged exclusively in soliciting and/or referring clients and customers to the Realtor® for consideration on a substantially exclusive basis shall annually file with the association on a form approved by the association a list of the licensees affiliated with that entity and shall certify that all of the licensees affiliated with the entity are solely engaged in referring clients and customers and are not engaged in listing, selling, leasing, renting, managing, counseling, or appraising real property. The individuals disclosed on such form shall not be deemed to be licensed with the Realtor® filing the form for purposes of this section and shall not be included in calculating the annual dues of the designated Realtor®.

The exemption for any licensee included on the certification form shall automatically be revoked upon the individual being engaged in real estate licensed activities (listing, selling, leasing, renting, managing, counseling, or appraising real property) other than referrals, and dues for the current fiscal year shall be payable.

Membership dues shall be prorated for any licensee included on a certification form submitted to the association who during the same calendar year applies for Realtor® or REALTOR-ASSOCIATE® membership in the association. However, membership dues shall not be prorated if the licensee held Realtor® or REALTOR-ASSOCIATE® membership during the preceding calendar year. (Amended 11/09)

PROCEDURE

DECEMBER 1st - The Dues Collection Policy is posted on realtor.org outlining deadlines for annual dues remittance.

JANUARY 1st - Dues from the local associations are due and owing to the National Association of Realtors®.

JANUARY 1 - MARCH 31 - The grace period for receipt of NAR dues ends on March 31. Dues remitted to NAR must be postmarked no later than March 31 and must cover the member board's Primary members who are Active Realtors® and Realtor® Associates in the count from the National Realtors® Database System (NRDS) as of April 1. If the annual dues are not paid by April 1, NAR may assess such late charges and administrative fees up to 1.5% monthly on the outstanding balance. Any member board, Institute Affiliate member or Individual member delinquent in payment of dues by more than 90 days may be required for show cause as to why the Board of Directors, at its discretion, should not revoke the charter of such member board or drop such Institute Affiliate member or Individual member from membership.

APRIL 15 - NAR Treasurer notifies each State Executive Officer of payments outstanding for their member associations.

The Finance Committee is responsible for the collection of NAR dues from its Boards, with identifying specific patterns of delinquency in the collections process, and with requiring Boards to provide specific written explanations of delinquencies, or to require the Board or its designated representative to appear at hearings to explain the occurrences of such patterns.

MAY 1 - NAR Treasurer prepares a delinquency notice and sends it to each individual Board Executive Officer whose Board's dues have not been fully paid according to NAR's NRDS count as of April 1. Copies of this correspondence are provided to the Board President, State President, State Treasurer, State Executive Officer and NAR Finance Committee Members.

MAY 15 - NAR Treasurer corresponds with delinquent Boards (Executive Officer and President) requesting written correspondence addressed to the Finance Committee of NAR stating reasons for unpaid dues or providing documented information to prove that the Board has, in fact, fully paid its dues. The Treasurer's correspondence indicates that unless the delinquency is resolved prior to May 31st, the Board or its designated representative will be required to appear before the Finance Committee or Sub-Committee at a special hearing to resolve any delinquencies.

Should NAR have reason to believe that a Member Board has failed to remit the proper amount of dues to NAR pursuant to Article II, Section 1 of the NAR Bylaws for the current year, or for any period within three years prior to the current year, it may initiate inquiry to determine whether such Board fully paid its dues. Should written correspondence fail to resolve the matter to the satisfaction of the NAR Treasurer, a hearing may be scheduled to take place at the next regularly scheduled meeting of the Finance Committee or at any special meeting of the Finance Committee called for the purpose of addressing the alleged dues deficiency, provided, however, that any Member Board must have at least 30 days prior written notice of such regular or special meeting.

The notice to the Local Board is addressed to the Board President with copies to the Board Executive Officer, Board Treasurer, State President, State Treasurer, State Executive Officer, Regional Vice President, and NAR Finance Committee and sets forth the procedure to be followed in the hearing, and emphasizes that the issues to be determined by the Finance Committee or Sub-Committee is whether the Board has appropriately paid its dues in full to NAR or whether there are extenuating and mitigating circumstances that should be considered.

The requirements to appear will be vigorously enforced in the case of Boards repeatedly delinquent from year to year. Failure to appear will result in the Finance Committee presenting a recommendation to the Leadership Team and Executive Committee based on the information available to them at that time.

At such meeting the Member Board will be asked to state the reasons for having to pay the proper amount of dues or provide documentation indicating it fully satisfied its dues obligation.

If the Member Board is a local Board, the State association to which it belongs shall receive notice of the hearing and have the ability to be present.

The Finance Committee may recommend disciplinary action be taken against any Board to be found in violation of Article II of the NAR Bylaws, which disciplinary action may include revocation of the Board's charter.

EXECUTIVE COMMITTEE - After consideration of the findings and recommendations of the Finance Committee, the Executive Committee may determine disciplinary actions or recommend to the Board of Directors disciplinary action including possible revocation of the delinquent Board's charter or any other recommendations or punitive measure deemed necessary.

NAR HEARINGS- NAR Finance Staff distributes copies of written responses from delinquent Boards to the Finance Committee. If there are delinquent Boards who have not submitted a written response, NAR Finance staff summarizes telephone conversations for the Finance Committee.

The hearing is conducted by a quorum of the NAR Finance Committee or Sub-Committee. The hearing is staffed by the Finance Division in consultation with the Board Policy Division and the Legal Affairs Division. Failure to appear at the hearing will result in the Finance Committee making a decision based on the information available to them at that time.

NAR Treasurer also requests that the President of the State association or other State association representative(s) duly designated by the President attend the hearing and present the recommendation of the State association.

The Finance Committee or Sub-Committee, upon review of the results of the hearing, if necessary, shall present to the Executive Committee and subsequently the Board of Directors its recommendation of disciplinary action consisting of reprimands, fines, suspension of entitlements, and/or revocation of the Board's charter.

NAR BOARD OF DIRECTORS- Board of Directors reviews the recommendations, if any, of the Finance and Executive Committees regarding the delinquent Board and determines the necessary disciplinary or punitive measures.

In the event the charter of any Board is revoked, the jurisdiction shall revert to the status of territory unassigned by NAR, and this shall be administratively entered upon the Board Jurisdiction records of NAR, and a report shall be made to the Membership Policy and Board Jurisdiction Committee. In the event the action to revoke a delinquent Board's charter is anticipated and the State association makes a recommendation for reassignment of the territory of the Board whose charter is being revoked, the Membership Policy and Board Jurisdiction Committee may consider and approve such reassignment at the next business meeting, subject to the actual revocation being made by the Board of Directors.

NOTE: Copies of all correspondence will be provided to the Leadership Team, Board Policy Division, Legal Affairs Division, and the Office of the Comptroller.

CREATE TRANSFER

You may be aware that the NAR no longer takes paper checks from its association for NAR Dues. Rather, you will use the complimentary safe and secure "Create Transfer" to create an ACH (direct deposit) to send a lump sum of dues money to NAR.

Make note if you are creating more than one in a row, that once you have created the initial one, do not use the "Back" button to create the second. Should you press the "Back" button, the second one will "stomp" on the initial one and therefore the transfer will not go anywhere. When looking at the payment confirmations that you print, you will notice they have the same EC Control Number, meaning only the last one was created.

If you have more than one Transfer to create (after the first one is completed) look to the left of your screen and there you will see a link called "Create EFT Transfer". Click on that link to get a new Create Transfer screen allowing you to create the next one.

MICHIGAN REALTORS® DUES CYCLE

PURPOSE

State dues of each Realtor® member, Realtor® Associate, Institute Affiliate, and Affiliate members shall be paid annually in advance and shall be due by the close of business on March 15th of each year (or the following Monday if March 15th falls on a weekend day).

POLICY

Dues, fees, and assessments are non-refundable.

The Association shall assess a \$5 delinquent member penalty on Local Associations which have not submitted at least 95% of their current year annual dues, or requests for extension, by March 15 each year.

Dues payable for new Realtor® members should be remitted to Michigan Realtors® within 30 days of the member joining the association. The annual dues collected and remitted for new members should be prorated according to the dues proration schedule.

Article III Section 2 (j)

Dues payable to this Association by Local Associations resulting from the election of new Realtor® Members shall be computed from the first day of the month in which such new Members are notified of election and shall be prorated for the remainder of the year. Dues payable to this Association by Local Associations resulting from an increase in the number of Nonmembers employed by or affiliated as independent contractors with Realtor® Members shall be computed from the first day of the quarter in which such Nonmembers are reported to the Local Association and shall be prorated for the remainder of the year.

Article III, Section 5, Dues Delinquency:

Should a Local Association be more than thirty (30) days delinquent in payment of dues or should the Association have reason to believe that a Local Association has failed to remit the proper dues amount, such Local Association and its leadership may be required to appear before the Association's Finance Committee for the purpose of addressing the alleged delinquency. In the event the delinquency is not resolved, the Finance Committee may recommend to the Association that the Local Association and its leadership be required to show cause as to why the Board of Directors should not take disciplinary action against such Local Association, which discipline may include revocation of the Local Association's charter. A Local Association shall be considered delinquent if the amount remitted is less than or equal to 94% of the association's liability, calculated under this Article.

PROCEDURE

Ecommerce Set-up and Proration Schedule:

Ecommerce has been updated with the amounts from the current dues cycle. A copy of the proration schedule is available on the MRAEC website.

Ecommerce Electronic Transfer Instructions:

When remitting your dues via electronic transfer through ecommerce please type the remittance amount in the following format:

Year Month (member total @ total price each member has paid for the specific month)

Ex: 2027 February New members (25@243.50)

Dues Rates and Partial Payments:

Annually, Michigan Realtors® presents the Finance & Audit Committee with a budget and dues proposal for their consideration and recommendation to the Board of Directors. The Michigan Realtors® Board of Directors then considers and approves a budget and dues rate for the following year. Once these steps are complete, Michigan Realtors® prepares a dues proration schedule, provided in a communication, notifying all local associations of the dues rate for the following year.

All Realtor® members with active, primary status should pay state and national dues at the local association of their choice. A Realtor® member shall either pay full annual renewal dues or prorated dues (including all new member fees) as provided in the dues proration schedule. An annual renewing Realtor® member shall pay the local association for the full annual renewal by December 31 of the preceding year, to avoid having a lapse in their dues payments. A Realtor® member shall pay prorated dues upfront for the remaining months (including the new member fees) in the first year of joining. New member dues should be remitted (in full for the remaining months of the current year) to the state and national within 30 days of their joining the association. Members who have joined in a previous year and their membership dues have lapsed for greater than 90 days, shall be treated as new members (for dues proration purposes) paying dues according to the dues proration schedule, (including **all** new member fees). Renewing members who are late in paying their dues or transfer to another local, and their payment has not lapsed for more than 90 days, shall pay the full annual renewal amount (no proration).

2026 RPAC DEDUCTIBILITY LANGUAGE

PURPOSE

This section provides an overview of the information that must appear on your members online invoices or their printed copies.

POLICY

There are at least two disclaimers you must include on your annual member invoices. One is for RPAC, required by the Federal Election Committee. If you are including a PAC item on your invoice, you must include the PAC disclaimer (see below). The other disclaimer you must include is information on dues deductibility, the Internal Revenue Code (IRC) Section 162 disallows tax deductions for lobbying expenditures. Therefore, if any portion of the member's dues are used for lobbying, the member must be told the percent/amount of dues that cannot be deducted on their income tax return as it is used for lobbying.

PROCEDURE

RPAC, above the line:

RPAC solicitations should be listed “above the line” and included in the grand total on the invoice (versus as a memo charge under a subtotal.) Also, please remember to display the charge as “2026 RPAC Investment*” (with an asterisk as the dues information and disclosure language will have an asterisk that refers to it.) Use 2026 if you will be remitting the RPAC investment during the 2026 year. Use 2027 if you will be remitting the dues to Michigan Realtors® in 2027.

For those of you printing your own invoices, the following specific language must be included on your 2027 dues billing statement for the nondeductible portion of dues and RPAC contribution requests. If you requested dues stock from the Michigan Realtors®, this language will already be pre-printed on the dues stock:

The following specific language must be included on your 2026 dues billing statements for the nondeductible portion of dues and RPAC contribution requests:

Payments made for dues are not deductible as charitable contributions for federal income tax purposes; however, payments made for dues may be deductible as ordinary and necessary business expenses subject to non-deductible restrictions on lobbying and political activities. The Michigan Realtors® estimates that 100% of your 2027 state dues are deductible for business purposes. The deductible portion of your NAR dues can be found on www.nar.realtor/membership/dues-information.

**RPAC contributions are voluntary and used for political purposes. Contributions are not limited to the suggested amount. Contributions are not deductible as charitable donations for Federal income tax purposes. You may refuse to contribute without reprisal or otherwise impacting your membership rights. For individuals investing \$1,000.00 or greater, up to 30% of this total investment may be forwarded to the National Association of Realtors® RPAC. All amounts forwarded to the National Association of Realtors® RPAC are charged against the applicable contribution limits under 52 U.S.C. 30116.*

Nothing herein shall be construed as a solicitation of contributions from non-members. A copy of the federal report, filed by National RPAC with the Federal Election Commission, is available for purchase from the Federal Election Commission, Washington D.C.20463. State reports are filed with the Michigan Secretary of State, Elections Division, Lansing, Michigan. RPAC 2 may, however, receive unsolicited contributions from non-members. Contributions from a corporation or others who may not legally be solicited for RPAC, may make contributions to RPAC 2 (the Realtors® ballot issue committee).

MICHIGAN REALTORS® EVENTS

AWARDS

Michigan Realtors® recognizes and presents awards in three distinguished categories each year at The Convention. Each local association/board has the option to nominate one primary member as a candidate for each award, every year.

Good Neighbor – The Good Neighbor award recognizes Realtors® who make extraordinary commitments to improving the quality of life in their communities.

Realtor® Active in Politics – The “RAP” award is a program designed to encourage, educate, identify, recruit, and recognize Realtor® contributions of time, investment, and effort at all levels within the government/political arena.

Realtor® of the Year – The “ROTY” award is the highest honor bestowed upon a Michigan Realtor®. It stands for integrity, individual achievement and perhaps the greatest compliment: recognition from peers in the real estate industry.

The call for entries will be sent to AEs in mid-June annually with the opening of registration for The Convention. All nominees are recognized during various functions throughout The Convention. Recipients for the current year are selected by a committee of past recipients of each award respectively.

MICHIGAN REALTORS® EVENTS

The Michigan Realtors® events calendar is updated regularly and a list of events can be found on the Michigan Realtors® website. Registration for each event opens approximately 60-90 days prior to the event. All registration is online and linked to the website. On-site registration is offered when available. Group registration is available and utilized by many local boards/associations to register multiple individuals in which they will be paying for and provides them a copy of the registration payment receipt for each. The Michigan Realtors® Events Team is happy to guide you through this process should you have any questions.

Michigan Realtors® provides complimentary registration and lodging accommodations to Michigan Realtors® Officers and Directors attending Michigan Realtors® events. Please keep this in mind if any of those Officers and Directors are also covered by your local bylaws.

EVENTS OVERVIEW

Achieve Conference

- Late January/Early February
- Typically, TH/F
- Primarily leadership focused content
- Open to all licensees
- Installation of Michigan Realtors® Officers & Directors for the new year

Professional Standards Workshop

- Late January/Early February
- One Day workshop, day prior to Achieve Conference
- Focused on Professional Standards/Hearing Procedures
- Open to all members

Broker Summit

- Mid/Late-April
- Typically, W/TH
- One Day focused on Broker specific topics
- Open to all licensees

Capitol Day

- Held biennial
- Typically June
- Open to all members
- One day, focused on legislative initiatives

MRAEC Retreat

- May/June/July, varies by year
- Typically, W/TH or TH/F
- Education, roundtables, networking
- Open to all local board/association Executives and staff

The Convention

- Late September
- W/TH/F
- Dozens of CE opportunities, award recognition, RPAC auction, full Expo
- Open to all licensees

CORE STANDARDS AND COMPLIANCE

PURPOSE

The Core Standards are intended to raise the bar for Realtor® associations and ensure high-quality service for members. All Realtor® associations, as a condition of membership, are required to comply annually with a set of standards that are specific to local and state associations and commercial overlay boards.

1. Code of Ethics
2. Advocacy
3. Consumer Outreach
4. Governance, Operations and Training
5. Financial Solvency

POLICY

The annual compliance cycle runs from January 1 to December 31, by which time all local associations and commercial overlay boards are required to submit their certification forms to their respective state associations. If a local or commercial association is not in compliance with the standards, state associations must notify NAR by January 30. Core Standards enforcement is the joint responsibility of the state and national associations. If a state association confirms that a local or commercial association is not in compliance with the Core Standards, that association's charter may be revoked. However, all associations will first have the opportunity to appeal this determination and appear before a hearing panel of the NAR Association Executives Committee to show cause why the association's charter should not be revoked.

PROCEDURE

Code of Ethics

- A. Every association will provide new and continuing member Code of Ethics training as required by Article IV of the NAR Bylaws.
- B. Every association will maintain a viable professional standards process to enforce the Code of Ethics and provide arbitration and mediation as member services. Associations must have a fully functioning professional standards committee with administrative capability to conduct the program including a certified Professional Standards Administrator, or must administer professional standards enforcement through a multi-board (or regional) professional standards agreement with other associations or with the state association.
- C. Every association will provide mediation services to members as required by Article IV of the NAR Bylaws. Associations must also offer ombudsman services to members and their clients and customers and may implement a "citation" enforcement policy.

Advocacy

- A. Unless prohibited by state law and in recognition of state law differences, each association shall include in their dues billing a voluntary contribution for the PAC or the Political Advocacy Fund (PAF) in an amount adequate to meet any NAR established RPAC fundraising goals. Dues billing for PAC or PAF contributions has been proven to be the most effective method for raising PAC or PAF dollars and in engaging our members in political advocacy*. A local association will have met this Mandatory Core Standard, regardless of whether they collect the full amount of their NAR established goal, if they include the voluntary contribution on their dues bill.
Notwithstanding the above, a local association that chooses not to include a PAC or PAF contribution on their dues bills, may, in the alternative, meet this Mandatory Core Standard if they deliver to NAR the full amount of any NAR established RPAC goal contributed by whatever legal means determined to be in the best interest of the local association (i.e., a corporate contribution in the full amount of the NAR established goal). In whatever manner the NAR established RPAC goal is met, funds shall be sent to RPAC or the PAF individually or collectively by/through the State Association (i.e., one check concept). The intent of this standard is to provide the best opportunity for every association to meet its goal.
*Unless prohibited by state law, it is recommended that to reach the highest participation levels possible, each local association include the contribution to either the PAC or the PAF "above the line" with appropriate disclaimers about the voluntary nature of the member contribution.
- B. Each association shall provide or distribute information and communications from NAR and the applicable state association, regarding the value of investing in and the benefits received from the individual's participation in the PAC.
- C. Each association is encouraged to participate in NAR Calls for Action (e.g., promotion through websites, newsletters, office visits, etc.) and provide adequate proof of participation.
- D. Each local association is encouraged to participate in State Calls for Action (e.g., promotion through websites, newsletters, office visits, etc.). It is the local association's obligation to provide adequate proof of participation.
- E. In addition to the requirements established in subsections A-D, each association must support the REALTOR® Party's "Vote-Act-Invest" goals, and must annually conduct at least two initiatives or activities furthering or supporting each of those three goals respectively.
Associations can meet the existing Advocacy requirement for 'Act' under the REALTOR® Party goals through activities that demonstrate a commitment to Diversity, Equity, and Inclusion and Fair Housing. Note, this is not an added requirement, but just another way to meet the existing Advocacy requirements.
Associations that earn Triple Crown for the previous year will meet the existing Advocacy requirement for 'Invest'.
- F. Associations must conduct or promote a diversity, equity and inclusion activity and a fair housing activity.

Consumer Outreach

- A. Every association will demonstrate engagement in at least two meaningful consumer outreach/engagement activities annually, including at least one activity demonstrating how the association is the "Voice for Real Estate" in its market, and at least one activity demonstrating the association's "Community Involvement and Investment." To meet this requirement, an association may not use the same activity more than once and any activity may only be submitted in one category.

1. Being the “Voice for Real Estate”

Promote market statistics and/or real estate trends and issues (e.g., press releases, interviews, social media posts, etc.). Content may consist of (these are examples, not an exclusive list):

MLS statistics, local market statistics, NAR research reports, local/state analysis of NAR statistics;

Collateral from (for example) NAR’s Consumer Advertising Campaign, NAR Media, NAR Research accounts, realtor.com, HouseLogic, RPR.

Effectively communicate the value proposition of using a REALTOR® in the real estate transaction.

2. “Community Involvement and Investment”

Engage in community activities that enhance the image of the REALTOR® (e.g., participate in an activity or conduct fundraising to benefit local community or charitable organizations).

- B. Community involvement and investment -- promoting the value proposition of using a REALTOR® and/or engaging in community activities which enhance the image of the REALTOR®, such as organizing human resources (e.g., participating in a Habitat for Humanity build) or conducting fundraising activities to benefit local community or charitable organizations.

Governance, Operations and Training

- A. Every association will maintain, have access to or will have legal counsel available.
- B. Associations shall adopt and maintain corporate documents, policies and procedures that conform to local, state and federal laws. Associations will timely file legally required reports and documents (e.g., corporate renewal documents, state and federal tax returns, etc.).
- C. Every association shall annually certify that its board of directors has reviewed and discussed the association’s business or strategic plan, that the plan includes an advocacy component, a consumer outreach component, a Diversity, Equity and Inclusion (DEI) component, and a Fair Housing component, and that those components have actionable implementation strategies.
- D. Local and state association chief staff must complete at least six hours of REALTOR® association professional development on an annual basis. In associations without paid/salaried staff, this requirement is applicable to the individual primarily responsible for performing the functions ordinarily carried out by paid staff in other associations.
- E. Associations will promote to their members the importance of participating in any NAR–conducted effort to assess member understanding of the overall value provided by associations at all three levels of the REALTOR® organization.
- F. Associations must annually offer, promote, or provide at least one professional development opportunity for their members.
- G. Associations must annually certify they have conducted or promoted a REALTOR® Safety activity.
- H. Associations will annually provide resources for or access to leadership development education and/or training for their elected REALTOR® leaders. Associations will document the training, tools, programs, and resources to which they offer or provide access.
- I. Associations with paid staff must adopt policies and procedures for conducting annual performance reviews of their chief paid staff, and must annually certify that a performance review for their chief paid staff has been conducted.
- J. Associations must identify their leadership policies concerning antitrust, harassment, conflict of interest, confidentiality, Code of Conduct, whistleblower, etc., and upload them to the Core Standards Certification Form.
Associations will offer annual training of no less than 1 hour on the above-mentioned policies for elected officers and the Board of Directors.
- K. Associations will demonstrate a commitment to Diversity, Equity, and Inclusion and Fair Housing.
- L. Associations will confirm they are effectively communicating their value proposition to their members.
- M. Every Association will effectively communicate with its membership.
- N. Every association will review and update M1 records for association staff to reflect current contact information and accurate role identification.
- O. Every association will acknowledge that membership records in M1 are updated within one week of receipt.
- P. Every association will have the capability to provide services to members virtually.
- Q. Every association will maintain a cybersecurity policy to protect member and staff data.

Financial Solvency

- A. Every association must adopt policies to ensure the fiscal integrity of their financial operations.
- B. All local associations with revenue of more than \$200,000 must annually submit a report from a CPA which includes either an audit opinion or an accountant’s review report. Associations with annual gross revenues of up to \$200,000 (including MLS-generated revenues and revenues from other business subsidiaries) are permitted to meet the standard using a compilation report. State and national dues and assessment amounts are not considered to be revenue for purposes of this measurement. These thresholds apply to all associations whether tax exempt or for profit. It will be left to the discretion of each association as to the frequency of an audit versus a review, recognizing that the costs of each type of engagement vary greatly.
- C. Any association considering bankruptcy must first obtain NAR’s consent to file for bankruptcy. To the extent permitted by law, any association that declares bankruptcy will be subject to automatic charter review.

LEGAL FAQ'S

MEMBERSHIP APPLICATION FAQS

QUESTION: Can/must a board deny membership to an applicant based upon the applicant's criminal record?

ANSWER: Not necessarily. It must be:

1. A criminal conviction within the past seven years; and
2. Crime must "reasonably relate to the real estate business or put clients, customers or other real estate personnel at risk."

NAR publication says a crime that "puts clients, customers or other real estate professionals at risk" includes those involving dishonest, deceptive or violent acts.

1. In the membership application, the member is typically asked this question and given an opportunity to provide explanation/mitigating factors. Includes age, extent and nature of crime, rehabilitation, facts and circumstances surrounding crime.
2. The Board of Directors then meets to consider the application. If at that meeting the Board determines that membership be denied, it should make formal findings of fact. The denial should be put on hold while the member is offered an opportunity to respond to those findings at a subsequent meeting.
3. The member will be given the findings and offered an opportunity to come before the Board of Directors to address those findings. They can bring counsel. It won't be a hearing in the traditional sense – They will just be given an opportunity to address the Board and explain why they think the Board should change its mind. The member will then be excused from the hearing and then the Board can make a final decision as to whether the membership should be denied.

NAR recommends that board get declaratory ruling from court before denying membership based upon criminal activity.

QUESTION: If the member has a real estate license, hasn't the member's criminal history already been reviewed by the State of Michigan?

ANSWER: No. The State does not actually ask an applicant about his or her criminal record.

Current salesperson license application says:

I have the ability and will serve the public in a fair, honest and open manner. If I have had a judgment of guilt in a criminal proceeding or a civil action against me, I am rehabilitated or the substance of my former offense is not reasonably related to the occupation or profession for which I am seeking a license.

QUESTION: What if a member is convicted of a crime while he/she is a member?

ANSWER: The Code does permit directors to take action after a professional standards hearing if a member is convicted of a felony, a crime involving moral turpitude, or a violation of real estate license law or fair housing laws. (Section 13b of the NAR Code of Ethics and Arbitration Manual)

QUESTION: When a member moves from one board to another, is the second board required to ask for a good standing certificate? Is the first board required to provide one?

ANSWER: The second board is not required to request information, but if it does, the first board needs to respond. There is a NAR Membership Policy Statement that states: In order to facilitate timely processing of applications for membership and to assist associations in determining an applicant's qualification for Realtor® or Realtor®-Associate® membership, associations shall, based on a request from another association, share information about current or former members. Minimum "core" member information shall include:

- Previous applications for membership.
- All final findings of Code of Ethics violations and violations of other membership duties within the past three (3) years (when available).
- Pending complaints alleging violations of the Code of Ethics or alleging violations of other membership duties.
- Incomplete or (pending) disciplinary measures.
- Pending arbitration requests (or hearings).
- Unpaid arbitration or unpaid financial obligations to the association or its MLS.
- Any misuse of the term Realtor® or Realtors® in the name of the applicant's firm.

QUESTION: Can one board admit a member that has unpaid dues or MLS fees at another board?

ANSWER: This depends on what the second board's bylaws say. The model bylaws say that the following provision may be adopted at the discretion of the local association:

The association will also consider the following in determining an applicant's qualifications for Realtor® membership:

1. All final findings of Code of Ethics violations and violations of other membership duties in this or any other Realtor® association within the past three (3) years.
2. Pending ethics complaints (or hearings).
3. Unsatisfied discipline pending.
4. Pending arbitration requests (or hearings).
5. Unpaid arbitration awards or unpaid financial obligations to this or any other Realtor® association or Realtor® association MLS.
6. Any misuse of the term Realtor® or Realtors® in the name of the applicant's firm.

If the new board's bylaws do not contain this provision, then the new board cannot deny membership because of unpaid dues or other financial obligations. Even if the bylaws do permit a board to take into account unpaid dues or unpaid final obligations, this does not mean that the new board must deny membership if unpaid dues – it is optional. The old board has no basis for objecting if the new board admits the member with unpaid financial obligations.

QUESTION: Can one board admit a member with unfulfilled ethics sanctions?

ANSWER: NO. A board cannot admit a member with unfulfilled ethics sanctions. This violates the NAR Constitution.

QUESTION: What if the new board accepts the person with the unfulfilled ethics sanctions?

ANSWER: The old board can file a complaint against the new board with NAR. The NAR "Association Policy Violation Resolution Proceeding" addresses complaints by a state or local Realtor® association that another Realtor® association has violated any NAR-mandated policy. The decision to file a complaint with NAR cannot be made by AE. The decision must be made by the board of directors.

QUESTION: Can a board admit a member who has a pending ethics or arbitration matter with another board?

ANSWER: YES. The second board may grant the member "provisional membership." Provisional members have the same privileges and obligations as other members. Provisional membership may be reconsidered if the matter is not resolved within six months.

QUESTION: I am told that a board can let other boards know that a member has unfulfilled ethics sanctions in M1.

ANSWER: YES. "T" indicates that a member has been terminated. There is also a field for pending arbitration/ethics matters ("Y").

QUESTION: What if the person with the unfulfilled ethics sanction is already a member of the second board? Can the first board advise the second board of this situation? Can the second board do anything with this information? Is the second board required to do anything with this information?

ANSWER: The NAR Code of Ethics and Arbitration Manual allows one board to provide a member's second board with notice of an ethics decision "as the President deems appropriate" (and as approved by legal counsel). Second board cannot terminate membership (or otherwise discipline the member) based on that notice but can use this information in any progressive discipline determination if the second board finds the member in violation of the Code at some future date. (The second board is not required to do anything with this information.)

DUES FORMULA FAQ'S

QUESTION: Are all Realtor® principals within a firm responsible for the payment of dues based on the size of a firm?

ANSWER: No. For any firm with more than one Realtor® principal, only one of those principals designated by the firm (i.e., the "designated Realtor®") is charged on the basis of the dues formula.

QUESTION: Can an individual be a principal in both a Realtor® and a non-Realtor® firm?

ANSWER: Yes. However, if a Realtor® is a principal in two firms, dues are calculated based upon the number of licensees in both of the principal's firms. An individual is deemed to be licensed with a Realtor® firm if the license is held by the Realtor® firm or by another licensed entity in which a Realtor® principal has a direct or indirect ownership interest.

QUESTION: What if the Realtor® has a separate firm that only does referrals?

ANSWER: There is a single exception to the dues formula for non-Realtor® licensees working in a referral company ("LFRO"). In order for the LFRO exception to apply, the DR must certify in writing that the licensees are working only for the separate referral company and are only involved in the referral of business. The LFRO exemption does not apply if the licensee provides any other real estate services.

QUESTION: Is a licensed assistant who works for an associate broker exempt for purposes of the dues formula? Is the rule any different if the licensed assistant is paid on an hourly basis only?

ANSWER: No. All licensed assistants in the firm are counted for purposes of calculating the designated Realtors® dues payment, regardless of whether they earn a commission.

QUESTION: When a designated Realtor® pays dues for non-Realtor® licensees under the dues formula, do these non-Realtors® become members of the local association?

ANSWER: No. The designated Realtor® is not paying dues on behalf of the non-Realtor® licensees. Rather, the designated Realtor® pays his/her own dues based on the number of individuals who are licensed with the firm, but who are not Realtor® members.

WORKING WITH MEMBERS

Legal Advice. When members ask you for legal advice, remember:

1. Intentionally or not, they often omit material details.
2. They often phrase their question in a way designed to get them the answer they want.
3. The hardest legal question for a lawyer is, “*Is this legal?*” Specific questions like, “*Can I release the earnest money?*” are relatively easy. You still must know the correct questions to ask – e.g., “*Is there a dispute?*” but we are talking about interpreting one statutory provision. On the other hand, when your member asks you a general question like “*Is this legal?*” – what your member is really asking, for example, is under all of the numerous state and federal statutes and case law, is this “legal”? It’s very easy to get misdirected. You may think you’re dealing with an Occupational Code issue, but it is actually a RESPA issue or an antitrust issue. The correct answer may even depend on the terms of this particular member’s independent contractor agreement with their broker.

Ethical Questions. Decisions in ethics/arbitration matters are designed to involve subjective judgment. Different panels could reach different decisions on the same facts and both be correct. That being said, it does not matter whether the AE thinks that something is an ethical violation or how an arbitration case should come out.

Enforcer. It is not the responsibility of the Association (or the AE) to make sure its members follow the law. It is not your job to interpret the law. Your members are competitors. It should never be the case that the topic of a directors meeting is whether Broker Smith’s new business model is legal.

Sexual Misconduct. The Association has legal responsibility for protecting its employees from being sexually harassed by its members. It does not have any legal responsibility for protecting any member from being sexually harassed by another member.

WORKING WITH EMPLOYEES

Hostile work environment. The law prohibits unwelcome comments or conduct based on gender (or race, religion, age, etc.). It does not mean an unpleasant work situation – a rude boss or obnoxious coworkers does not meet the legal definition of a hostile work environment.

Criminal records. EEOC says an employer cannot simply adopt a policy that disqualifies any job applicant with a conviction for any crime. This is because studies show that this policy has a disproportionate impact based on race and national origin. Such a policy would make it difficult, if not impossible, for people with criminal records to return to society.

- An exclusion based upon a conviction must be job related for the position in question. Employers must consider the following factors:
 1. The nature and gravity of the offense;
 2. The time that has passed since the offense and/or completion of the sentence;
 3. The nature of the job sought.
- An exclusion based on an arrest (rather than a conviction) is never permissible.
- Employers are encouraged to provide for “individualized assessments” where the individual is given notice that he/she has been screened out because of a criminal conviction. The individual is then given an opportunity to demonstrate that the exclusion should not be applied due to his/her particular circumstances, such as:
 - Extenuating circumstances about the offense;
 - Post-conviction conduct/employment history;
 - Rehabilitation;
 - Character references.
- Employers may be able to justify excluding individuals from particular positions for specified criminal conduct.
- Employers are encouraged to limit inquiries to records for which exclusions would be job related for the position in question.

How to handle a request for accommodation. Under Michigan law; specifically, the Persons with Disabilities Civil Rights Act (“PWCRA”) states:

... a person shall accommodate a person with a disability for purposes of employment, unless the person demonstrates that the accommodation would impose an undue hardship.

MCL 37.1102. An employer’s failure to do so can result in that employer’s liability for discrimination based on the employee’s disability. However, in order to file a lawsuit based on an employer’s failure to accommodate an employee’s disability, the employee must first have advised the employer, in writing, of the need for an accommodation.[1] The PWCRA provides:

A person with a disability may allege a violation against a person regarding a failure to accommodate under this article only if the person with a disability notifies the person in writing of the need for accommodation within 182 days after the date the person with a disability knew or reasonably should have known that an accommodation was needed.

MCL 37.1210(18). The employer is required by law to post notices or use other appropriate means to provide all employees and job applicants with notice of the “182-day written notice of need for accommodation.” MCL 37.1210(19). “Other appropriate means” could include a provision in an Employee Handbook and Employment Application. In sum, under Michigan law, the onus is clearly on the employee with a disability to formally request an accommodation.

The same, however, is not so clear under federal law. Under the federal American’s with Disabilities Act (the “ADA”), an employer unlawfully discriminates against an employee and/or job applicant by failing to make reasonable accommodations for that otherwise individual unless the accommodation would impose an undue hardship. 42 USC 12112(b)(5). According to the Equal Employment Opportunities Commission (“EEOC”), the federal agency entrusted with implementing and enforcing the ADA.

When an individual decides to request accommodation, the individual or his/her representative must let the employer know that s/he needs an adjustment or change at work for a reason related to a medical condition. To request accommodation, an individual may use "plain English" and need not mention the ADA or use the phrase "reasonable accommodation."

Unlike Michigan law, there is no requirement that the request for accommodation be made in writing. The EEOC provides the following examples of requests for accommodation:

Example A: An employee tells her supervisor, "I'm having trouble getting to work at my scheduled starting time because of medical treatments I'm undergoing." This is a request for a reasonable accommodation.

Example B: An employee tells his supervisor, "I need six weeks off to get treatment for a back problem." This is a request for a reasonable accommodation.

Example C: A new employee, who uses a wheelchair, informs the employer that her wheelchair cannot fit under the desk in her office. This is a request for reasonable accommodation.

Example D: An employee tells his supervisor that he would like a new chair because his present one is uncomfortable. Although this is a request for a change at work, his statement is insufficient to put the employer on notice that he is requesting reasonable accommodation. He does not link his need for the new chair with a medical condition.

Accordingly, a request for accommodation under federal law is less formal and not as precise as a request for accommodation under Michigan law. However, whereas the PWDCRA applies to virtually all Michigan employers [those with 1 or more employees, MCL 37.1201(b)], the ADA only applies to employers with 15 or more employees. 42 USC 12111(5)(A).

SYSTEMS

M1

PURPOSE

Realtors® M1, also known as Members First, stands as a robust platform for member information engagement, designed to serve as the ultimate repository for pristine, precise, and actionable member data. The primary objective of Realtors® M1 is to enhance user satisfaction, fulfill association requirements for efficient member data administration, and ultimately enhance member efficiency.

POLICY

To access M1, simply visit nar.m1.realtor and use your POE credentials to log in.

Here, you'll find various features and functions, including:

- The Knowledge Center
- Events
- Analytics & Insights Hub

These resources offer practical tools and information to support your use of the M1 platform.

PROCEDURE

Explore the diverse array of supplementary analytic tools tailored for association executives within M1. Dive into the comprehensive M1 user manual to unlock insights into the multifaceted capabilities of the system.

<https://nationalasnofrealtors.mcoutput.com/1374755/Content/Introduction/Welcome%20to%20M1.htm>

Engage with the NAR M1 Team through immersive user group webinars designed to enhance your proficiency and maximize your utilization of the platform. Stay informed about upcoming webinar schedules by subscribing to the monthly M1 newsletter, curated by NAR.

ECOMMERCE

PURPOSE

Ecommerce is the transaction processing mechanism connected to the NAR M1 platform. It is used to transfer funds related to National, State, and local interconnected activities - manual EFTs transferred between locals do not incur any transaction fees.

POLICY

All dues payments transferred from a local association to state and national associations must be transacted across the ecommerce platform. The ecommerce platform should also be used to send batches of RPAC payments to the state and national associations.

For access to the system, locals will contact NAR to obtain and define access levels.

PROCEDURE

A local association may set up their Ecommerce platform such that each user processing or approving membership dues has their own unique credential with different levels of access. This is the best choice when a local wants to have a transaction created by one staff person and another person approves the transaction. A local association may also choose to setup their access with one credential and share it among their finance and membership department.

Once access is granted, there are user guides at the top of the Ecommerce portal including:

- Ecommerce User Manual
- Newsletters
- Quicktakes
- Quick Reference Guides

ARISTOTLE

PURPOSE

Aristotle 360 serves as the all-encompassing PAC management system adopted by National, State, and Local Associations for monitoring individual donor contributions. Michigan Realtors® uses Aristotle not just for tracking donor contributions, but also for generating reports like monthly progress and goals, managing major investor recognition, and ensuring compliance with the National Association of Realtors®, and for reporting to the State of Michigan to remain in compliance with campaign finance laws and regulations.

POLICY

Local associations are enabled read-only access to Aristotle, allowing them to view and generate reports tailored to their members' contributions.

To gain access to Aristotle, please contact Brandon Garner via email at Brandon.Garner@aristotle.com

PROCEDURE

Michigan Realtors® staff are available to support you in several ways: pulling reports, setting up local association-specific credit card links, or creating special event webforms for investment purposes. For inquiries regarding Aristotle, please contact Anthony Darabos at adarabos@mirealtors.com or Riley Pierce at rpierce@mirealtors.com.

CONTINUING EDUCATION

PURPOSE

Michigan real estate licensees must complete at least 18 hours of total continuing education within their individual three-year licensing period to remain compliant for license renewal.

POLICY

Most licensees have a three-year licensing period, which can be determined by counting back three years from the expiration date listed on the licensee's pocket card. Licensees must complete at least 18 hours of continuing education prior to their date of expiration, or the date they renew their license, whichever date comes first.

Within the 18 credit hours required for renewal, licensees must complete at least two hours of legal continuing education and one hour of fair housing continuing education in each of the three years. The remaining nine credits to reach a total of 18 are considered elective and may be credits of any type and taken at any time during the three-year license term.

Important note:

Licensees with a 'Salesperson' license type will only be assigned one license number and it will be associated with only one employer, either a brokerage company or a holding company (license in 'escrow'). Any person with an 'Active' real estate license is required to complete their continuing education requirements, regardless of employer or lack thereof.

A licensee may apply for a broker license only after completing a 90-hour precursory course that has been approved by LARA and completing the broker exam through PSI, similar to the way they obtained their 'Salesperson' license.

There are three types of broker licenses: Individual Broker, Non-Principal Associate Broker and Principal Associate Broker. Once a licensee has obtained a broker license of any type, their Salesperson license and number will become 'Null & Void', as it will be superseded by their Broker license and the licensee will be assigned a new license number and expiration date.

Each license type is assigned its own unique four number prefix:

- 6501 - Salesperson
- 6502 - Principal Associate Broker
- 6504 - Individual Broker
- 6506 - Non-Principal Associate Broker

A licensee may hold more than one Broker license depending on the number of offices they may be connected to. Each Broker license will have its own unique number and expiration date.

In terms of Continuing Education for those with multiple licenses, it is a best practice to use the earliest license expiration month and date as the deadline for Continuing Education credit each year.

PROCEDURE

CE Marketplace:

Every real estate licensee in Michigan has no-cost access to track their continuing education history on CE Marketplace (www.cemarketplace.net).

Licensees can register on the CE Marketplace website using their 10-digit individual license number. If a licensee is having trouble registering with CE Marketplace, please have them call our toll-free number at 844-642-6633 and a member of the CE Marketplace staff will assist them.

Only CE courses that have been certified by CE Marketplace are eligible to meet renewal requirements. If you are providing a continuing education course for your membership, you will want to either make sure you have submitted the course in CE Marketplace for approval, or the provider of the course has submitted the course for approval.

To submit a course for CE Marketplace certification, a 'School' account is required. If you are unsure whether your local association has a School account, please contact CE Marketplace for further assistance.

Once the course has been certified, it must be scheduled in the CE Marketplace system. Once the class session has been completed, the provider of the course will use a provided Excel spreadsheet to upload the attendees for the class session.

Upon completing continuing education with a provider of a certified course, the providing organization (sponsor) must report the licensee attendance back to CE Marketplace within 10 business days.

If you have any questions related to continuing education such as requirements, course approval, reporting attendance and other issues, please contact CE Marketplace at 844-642-6633 or via email at education@cemarketplace.net.

Succession Planning Checklist for REALTOR® Associations

There are two succession scenarios: A planned departure, such as the AE retiring or accepting another job; or an unplanned departure for another reason. Since experience shows it can be as much as six to nine months (or longer) before a replacement AE is on the job, it is incumbent upon the Board of Directors to act quickly and with certainty to continue the association's service to the members. For that reason, every Board of Directors needs to develop a succession plan and review it annually. In addition, developing and reviewing a succession plan is a healthy point of discussion for the Board to consider its values and resources.

The [Society for Human Resource Management](#) defines succession planning as “a focused process for keeping talent in the pipeline. It is generally a 12- to 36-month process of preparation, not pre-selection.”

Section 1: Develop the Plan

- A. The board adopts a policy expressing the rationale for a succession plan, a commitment to make an orderly transition in the best interests of the membership.
- B. The board develops and approves a checklist of procedures. These procedures become official policy and should be readily available.
- C. The board reviews and annually updates the position description for the AE. (See “[Creating Job Descriptions](#)” on nar.realtor)
- D. The AE develops a “turnover” book or file, a ready reference notebook or file of succession materials to be used in the event of unavailability

caused by accident, illness, or other unexpected event. The AE reviews the contents with the board, periodically reviews and updates the book, and stores in a safe where it is readily accessible.

Section 2: Checklist for Hiring an Interim Executive

This plan will be used in the event of an unplanned vacancy or until a full-time replacement can be found and installed.¹

- A. Recently updated position description
- B. List of qualifications desired in an interim manager
- C. Resolve any urgent issues (e.g., Core Standards deficiency or IRS issue)
- D. Identify who appoints the interim executive (President, Executive Committee, full Board of Directors?)
- E. Contact information on the interim AE candidate (if known; in many cases it's a member of the existing staff)
- F. Establish the time frame for selection and appointment of the interim AE. (24-48 hours? Within 30 days?)
- G. Establish a budget for obtaining an interim AE with allocations for possible costs involved with the hiring process, salary range, benefits, legal advice, outside assistance and subsidy for initial relocation expense, if required.

Section 3: Plan for Hiring Full-Time Replacement

A pre-determined, well thought out replacement plan is essential to moving the process ahead with confidence and efficiency and will minimize confusion and conflict.

¹ Note: Some retired AEs from other associations are available to act as interim AEs. NAR's [Strategic Association Management \(SAM\)](#) team may be able to direct you to a potential candidate.

- A. Identify who will conduct the search and make a recommendation to the Board of Directors. This might be the Board of Directors or Executive Committee, but it could also be a special Search Committee. If a Search Committee:
 - Who will serve on the Search Committee (specify leadership position or membership group to be represented)?
 - Who will recommend or appoint/approve any at-large members beyond those identified by position?
 - What is the minimum/maximum number to be appointed?
- B. Identify a budget for conducting the search.
 - What is the operating budget for the search process?
 - Will you use a professional search firm? What will be the approximate cost, including consultant fees and travel?²
 - Will you pay expenses for candidate interviews either at NAR meetings or on site, or both?
 - Overhead expense (staff support, communications, candidate travel arrangements and on and off-site meeting logistics, legal counsel assistance in the event of contracts, etc.)
- C. Establish a projected total allowable dollar value you will be willing to pay for salary/benefits/perks for a new executive. While you will want to refine and update this when the actual vacancy occurs, the projection will be useful in determining how to conduct the search.
 - Identify the process that will be employed for determining the salary/benefit package, e.g., local salary surveys, ASAE, NAR, outside HR consultant.

² Suggestion: Contact NAR's [Strategic Association Management \(SAM\)](#) team for assistance.

- D. Establish the process.
 - What is the timeline?
 - Review governing documents?
 - Who conducts the search?
 - Who authorizes expenses for the search?
 - Who gives final approval to the candidate?
 - Who is authorized to complete salary/benefits negotiations with the selected candidate?
 - What is the role of staff for operational support (making travel arrangements, minutes, correspondence with candidates, preparation of information packets on the association for the final candidates?) What staff position will be the candidates' point of contact?
 - What is the role of staff in giving input for candidate requirements?
 - Where do we post a position (e.g., NAR's website, ASAE, State Association, Indeed, LinkedIn)?
 - Is there a budget for advertising?

Section 4: Develop a Turnover Book

- Have a turnover book with staff names and job descriptions, current vendors, and contractual obligations, how to access/change passwords, etc.

Keep the following items in one easily accessible place:

- A. Governing documents for the association and any subsidiaries (MLS, foundation, etc.)

- B. Bylaws and MLS rules most current NAR certification date.
- C. IRS Letter of determination (if appropriate)
- D. Employer Identification Number
- E. Most recent audit or financial review
- F. Past and current 990s or tax returns
- G. Sales tax numbers or exemption certificates
- H. A listing of financial institutions; instructions for changing check-signing authority
- I. Notification list (who should be notified in the event of a departure of the CEO -- banks, state association, NAR, association attorney, CPA, media)
- J. Business or strategic plan (adopted annually)
- K. Fill-in-the-blanks press release announcing the management change and list of media contacts
- L. List of locations of important files; blank checks; bank records and statements; program files, lockboxes and membership records
- M. List of key holders for the association office
- N. Record of passwords for secured sites (online banking, etc.)
- O. Staff organizational chart: include the current chart and what one might look like should the AE leave; include webmaster contact information
- P. Twelve-month association events calendar
 - Dues collection and remittance dates

- Core Standards compliance deadline
- Convention and meeting dates for local, state, national associations
- Personnel reviews and salary adjustments
- Lease and maintenance agreement renewals
- Budget preparation and approval dates

ELECTIONS AND VOLUNTEER COMMITTEES

COMMITTEE VOLUNTEER & NOMINATIONS

PURPOSE

Volunteer committees serve a multifaceted purpose within Michigan Realtors®, playing a crucial role in advancing our missions and achieving our goals. These committees are often composed of dedicated Realtor® members who volunteer their time, skills, and expertise to support various aspects of Michigan Realtors® work. One primary function of volunteer committees is to provide specialized knowledge and experience that can address specific issues or tasks. By bringing together individuals with diverse backgrounds and expertise, committees are able to tackle challenges with a depth of understanding that might not be available otherwise.

POLICY

The following standing committees are appointed by the Michigan Realtors®.

- Broker Summit Task Force
- Convention Task Force
- DEI Committee
- Fair Housing/Equal Opportunity Committee
- Finance & Audit Committee
- Legal Action Committee
- MICAR
- MICREA
- Michigan Realtors® Association Executive Council
- Michigan Realtors® Scholarship Trustees
- Personnel Committee
- Public Policy Committee
- Realtors® Political Action Committee
- YPN

In addition, volunteer teams will be maintained for the following:

- Professional Standards Hearings
- Grievance Proceedings
- Political Involvement Networks

COMMITTEE CHARGES

Specific charges shall be given to each committee, task force, or other group by the Board of Directors through an annual operational plan or other Board action. These groups shall prepare meeting minutes.

Committee chairman and vice chairman are charged with the responsibility of creating a timetable for the committee to accomplish the assignments, taking into account the necessary referrals for approval of the Board of Directors and adequate time for staff to assist in the implementation of the program.

Committee members of every appointed committee who miss two consecutive meetings will be dismissed and replacements appointed at the President's discretion.

PROCEDURE

Volunteer committee nominations open annually in September and run for one month. To volunteer or nominate, log into the Member Web Portal and click "Committee", then "Nominate" next to the committee's name.

If you or your members have any trouble logging in or volunteering, please contact Kaetana Kelly at kkelly@mirealtors.com or 517-334-5554.

<https://michiganportal.ramcoams.net/Login.aspx?ReturnUrl=%2f>

DIRECTOR ELECTION

PURPOSE

Michigan Realtors® organizes their annual district director election, strategically aligning with the open seats corresponding to the Congressional Districts. This approach ensures representation that mirrors the geographic and demographic diversity within Michigan's real estate landscape.

PROCEDURE

Each Realtor® member may cast no more than one vote for a candidate for District Director. A vote cast by a Realtor® member for a District Director shall be cast for a director representing the District in which that Realtor® member resides. Realtor® members that reside outside of Michigan shall be able to cast a vote for District Director for the District in which the Local Association office building is located.

Important Dates

- Deadline to file for District Director - Friday, July 17, 2026.
- Voting for Directors will open online on Wednesday, September 2, 2026.
- Voting will conclude on Thursday, October 1, 2026 at 11:59 pm.
- The nomination process for NAR Director will be announced when the number of open Director Positions is determined by NAR based on July 31, 2026 membership numbers.
- Michigan Realtors® members living in Congressional Districts 1, 2, 5, 10, 11, and 13 and with active NRDS ID numbers as of July 31, 2026 are eligible. Home address determines voting district.

To determine your Congressional District, please search by home address here www.house.gov/representatives/find-your-representative.

For eligibility requirements and an application form, please contact Brian Westrin at bwestrin@mirealtors.com.

RPAC FUNDRAISING

WHAT IS A PAC?

- Political Action Committee
- Promotes transparency and disclosure
- Keeps the playing field level

WHY DO WE NEED A PAC?

- Like it or not, government has a major influence over your business and our industry. Remember 2020?
- Vet and support candidates that know and understand our issues (or at least willing to learn them).
- Running for office is not easy or cheap. Finances are needed to get a candidate's message out to the public and rise above the noise.
- Opposing interests have them and use them.

SOLICITABLE RPAC ACCOUNTS AND CLASSES

RPAC 1

Hard dollar account. Direct money from Realtor® members and affiliates, their spouses, and association staff. Money goes directly to candidates.

RPAC 2

Soft-dollar account. Direct money from Realtor® members and affiliates, their spouses, association staff, corporate affiliates and brokerages, and local associations. Money used for ballot measures and issues advocacy.

Three-way Agreement

30% National RPAC

60% State Association

(25% if the association meets both the participation and fundraising goal for the past 2 years)

10% Local Association (eligible up to 25% if they've met both fundraising and participation goal in the past 2 years)

RPAC Investment Recognition (State and National)

\$15 – Investor counting towards NAR participation total

\$100 – Century Circle Investor

\$250 – Silver Circle Investor

\$500 – Gold Circle Investor

\$1,000 – Sterling R Investor

\$2,500 – Crystal R Investor

\$5,000 – Golden R Investor

\$10,000 – Platinum R Investor

\$25,000 Lifetime – RPAC Hall of Fame (Tiered at every \$25,000)

\$2,000 to NAR selected candidates – President's Circle

\$1 or more to NAR selected candidates- Realtor® Pro Property Platform

MAIN RPAC Awards

NAR Presidents Cup

NAR Triple Crown

Michigan Realtors® Awards

Greatest Over Goal

Highest Participation

Most Improved

LOCAL RPAC FUNDRAISING RESOURCES

NAR RPAC PARTNERSHIP GRANT

NAR reimburses event expenses while all attendee and sponsor investment goes to RPAC.

MICHIGAN RPAC MAJOR INVESTOR EVENT GRANT

The state association will work to cover out the door event expenses of approximately \$85 per attendee (no reimbursement above \$100 per attendee) while all investment goes to RPAC.

Using these Grants is the best way to use resources in support of investment and participation goals while assuring local and membership recognition. You will also avoid campaign finance compliance and RPAC policy headaches.

Please contact the Michigan Realtors® Government Affairs Team at least six weeks prior to an event to review logistics and start requesting Grant resources.

RPAC FUNDRAISING COMPLIANCE

Games of Skill and Chance

Games of Chance (raffles, drawings, poker, etc.) are prohibited when raising money for RPAC.

Games of Skill (bag toss, putt-putt challenges, fashion contests, basketball tournaments, etc.) are all okay and provide friendly competition among members.

Note: A combination of skill and chance is prohibited. For instance, a winner of skill challenge was given a reward that featured an element of chance. Rely on Michigan Realtors® to review a proposed fundraising model. The earlier, the better!

Disclaimer

Contributions are not deductible for Federal income tax purposes. RPAC contributions are voluntary and used for political purposes. You may refuse to contribute without reprisal or otherwise impacting your membership rights. For individuals investing \$1,000.00 or greater, up to 30% of this total investment may be forwarded to the National Association of Realtors® RPAC. All amounts forwarded to the National Association of Realtors® RPAC are charged against the applicable contribution limits under 52 U.S.C. 30116. Nothing herein shall be construed as a solicitation of contributions from non-members. A copy of the federal report, filed by National RPAC with the Federal Election Commission, is available for purchase from the Federal Election Commission, Washington D.C.20463. State reports are filed with the Michigan Secretary of State, Elections Division, Lansing, Michigan.

RPAC SPENDING

Candidate Committees to Elect (RPAC 1)

Leadership Funds (RPAC 1)

Legislative Caucus Campaign Committees (RPAC 1)

Issues Advocacy Funds (RPAC 2)

Ballot Question Committees (RPAC 2)

CAMPAIGN CONTRIBUTION LIMITS

House - \$12,250

Senate - \$24,500

Governor - \$83,250

Secretary of State - \$83,250

Attorney General - \$83,250

Supreme Court - \$83,250

Caucus Campaign Committees - \$48,875 per calendar year

U.S. House - \$5000 Primary/\$5000 General

U.S. Senate-\$5000 House/\$5000 General

RPAC ENDORSEMENT RESPONSIBILITIES

STATE REPRESENTATIVE/ STATE SENATOR

Local association may conduct candidate interviews and makes recommendations to the RPAC Trustees for approval or make a recommendation based on incumbency.

US HOUSE

If there is an open seat, local associations conduct candidate interviews and make recommendations to the RPAC Trustees for approval. For incumbents, Michigan Realtors® Trustees recommend to NAR Trustees for their approval.

US SENATE

MR RPAC Trustees interview and recommend to NAR Trustees for their approval.

STATE CONSTITUTIONAL OFFICES AND SUPREME COURT

MR RPAC Trustees interview and endorse.

BALLOT ISSUES

Michigan Realtors® Public Policy Committee reviews and develops a position and makes a recommendation to RPAC Trustees.

CANDIDATE INTERVIEW OVERVIEW

Local Associations work with their respective Michigan Realtors® Field Staff each election year to reach out to those candidates that have filed for office inviting them to an interview with their Government Affairs/RPAC committees.

- The candidate questionnaire is prepared by Michigan Realtors® Public Policy Staff with a focus on real estate and the economy.
- Local Associations can often spend weeks completing the interview process through initial candidate outreach/scheduling interviews/hosting the interviews/making a recommendation to the Michigan Realtors® RPAC Trustees.

2026 ENDORSEMENT PROCESS

RECOGNITION STRUCTURE

For Incumbents running for re-election in the State House/Senate, below are the recognition endorsement levels:

REALTOR® CHAMPION

- >90% voting record
- Sponsor/co-sponsor Realtor® Legislation
- Leadership Position
- Recommend endorsement without interview

REALTOR® SUPPORTER

- 61-89% voting record
- Sponsor/co-sponsor Realtor® Legislation
- Recommend endorsement without interview

INCUMBENT

- <60% voting record
- Recommend Interview

CANDIDATES WILL STILL BE RECOGNIZED AS “ENDORSED”

Field Staff will present incumbent recommendations to local associations prior to the April filing deadline. Local associations can then decide to endorse those candidates that fit the criteria without an interview. That recommendation would be solidified by the MR RPAC Trustees and will be carried through the General Election. RPAC Trustees will decide monetary support based on RPAC budget. Local Association publishing of state endorsed candidates cannot occur before Michigan Realtors® publishes that information. Local associations are encouraged to host check presentations with their endorsed officials.

INTERVIEW TIMELINE FOR OPEN SEATS

All local association interviews and recommendations for the 2026 Primary must be made by June RPAC Trustees meeting and September RPAC Trustees meeting for the General Election.

If there are two or more boards that share a district, Michigan Realtors® Staff will coordinate the interview. When multiple associations are interviewing, each local will be offered equal representation.

If a local association does not wish to interview for the Primary or General, the RPAC Trustees will review submitted questionnaires and make a recommendation.

LOCAL ALLOTMENT

Locals can become involved in: Mayoral, City Council, County Commissioner, and other local races that impact the real estate industry and private property rights.

Local Associations have an allotment available to use towards endorsements of local candidates. The total is calculated based off the average of the previous 2-year RPAC fundraising totals.

10% of the local associations raised funds will be allotted to support candidates for local office if they do not reach their stated RPAC fundraising or RPAC participation goal for the calendar year.

20% is awarded if they meet one stated goal - either RPAC fundraising goal or their RPAC participation percentage goal.

25% is awarded if they meet both RPAC fundraising goal and their RPAC participation percentage goal.

2026 RPAC IMPORTANT DEADLINES

To support a member receiving RPAC recognition associated with these events, Michigan Realtors® must receive the completed RPAC investment at the state association office by close of business on these dates.

Tuesday, May 19: \$250 and Major Investor recognition at the NAR Legislative Meetings

Friday, August 21: \$250 RPAC Investor appreciation luncheon at Michigan Realtors® Convention

Friday, August 21: Major Investor appreciation reception at the Michigan Realtors® Convention

Tuesday, October 13: Major Investor appreciation reception at the NAR Convention

Wednesday, December 2: Year-end Major Investor recognition with Michigan Realtors® and NAR

FIELD STAFF

Assists in the planning, development, and implementation of legislation through an ongoing grassroots network in Michigan to support Realtor® governmental and legal advocacy programs. Provide local associations with legislative, regulatory, political, and legal updates and RPAC fundraising support.

MICHIGAN REALTORS® PUBLIC POLICY FIELD DIRECTOR ASSIGNMENTS



Amy Taylor,
Public Policy Field Director
ataylor@mirealtors.com
(517) 749-0691

- Aspire North
- Battle Creek Area
- Branch County
- Commercial Alliance
- Commercial Board
- East Central
- Eastern Thumb
- Greater Kalamazoo
- Greater Lansing
- Greater Shiawassee
- Hillsdale County
- Jackson Area
- Lapeer Upper Thumb
- Lenawee
- Montcalm County
- St. Joseph County
- Southeast Border
- Southwestern Michigan
- West Michigan Lakeshore



Buzz Thomas,
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- Detroit
- Dearborn Area
- Greater Metropolitan
- Grosse Point
- North Oakland



Shawon Cecil,
Public Policy Field Director
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- Antrim Charlevoix Kalkaska
- Bay County
- Central Michigan
- Clare Gladwin
- Emmet
- Eastern Upper Peninsula
- Greater Regional
- Midland
- Mason Oceana Manistee
- Northeastern Michigan
- Saginaw
- Upper Peninsula
- Water Wonderland
- West Central



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- Greater Metropolitan
- Grosse Point
- North Oakland



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- Ann Arbor Area
- Livingston County



Clarence Gayles,
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- Dearborn Area
- Greater Metropolitan
- Grosse Point
- North Oakland

MICHIGAN REALTORS® AMPLIFY | SHARE YOUR STORY



Does your local association and/or members have a video, podcast or upcoming event that provides your local market and community with the value of your services as a Realtor®? We would like to share your story! To be considered for a future installment of Michigan Realtors® Amplify, post your event coverage on Facebook and include the hashtag: #michiganrealtorsamplify

Michigan Realtors® reserves the right to share your event coverage on our Facebook page, Facebook Stories and on the homepage of [Mirealtors.com](https://www.mirealtors.com).