

W I C C C C T T E S



EQUITY

Community Partnerships Playbook

A playbook for Market Centers to build strong relationships with the communities in which they live, work, and serve.



C O M M I T T E E G U I D E

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Introduction

On September 17, 2020, the Keller Williams International Associate Leadership Council (IALC) voted unanimously to amend KW's Belief System (WI4C2TES) to include "Equity: opportunities for all." After months of self-examination, curiosity, and conversation, Keller Williams leadership acknowledged that we cannot be the company we claim to be unless our core culture demands that we actively and uncompromisingly run inclusive, diverse, and equitable businesses.

This playbook is intended to support and assist Market Centers in creating powerful partnerships and build strong relationships with the existing community organization in which they live, work, and serve. Through strong relationships, we are able to better leverage the tools available to Keller Williams associates and combine resources to serve our communities. Together we can reach a shared vision and mission.

Playbook Goals

Use this playbook to:

- Compile the tools and resources necessary to create strategic partnerships with organization in your community.
- Identify and locate strategic partnerships.
- Learn how to present the benefits of partnership to community organizations.
- Develop your familiarity with the Keller Williams resources to enable precise, productive, and authentic conversations.
- Identify local, regional, and national organizations and resources to collaborate, support, and engage with to combat marginalization in real estate, especially based on race and identity.

Be a Community Leader Through Partnerships

What is a Community Partnership?

A community partnership is a sustained relationship between an organization and the Market Center. The goal of a community partnership is to curate win-win opportunities that benefit the community, engaged associates in the Market Center, and the partner organization.

Why You?

- What excited you about the potential of community partnerships?
- How could a community partnership benefit your local area?
- What will you get out of it?
- How does it grow your business?
- How does it grow YOU?

Benefits of Community Partnerships

Community partnerships provide pathways for living out our mission— To build careers worth having, businesses worth owning, lives worth living, experiences worth giving, and legacies worth leaving.

Careers Worth Having

Your career is already financially connected to your Big Why. Connect your Big Why to your commitment to give back to society at the same time through partnerships that integrate lead generation such as teaching home buyer workshops or grow your Profit Share tree such as hosting career nights.



Businesses Worth Owning

As a business owner you know that profit is important and only piece to having a business worth owning. Community partnerships may be an opportunity to find new talent for you team through career nights or a chance to share your exuberance for real estate with young adults as a mentor. Community partnerships that include first-time home buyer workshops may also feed your profitability.



Lives Worth Living

Research shows that people who give back to their community:

- have higher life satisfaction and individual self-esteem.
- feel a greater sense of belonging.
- navigate stage of life changes more easily.
- are physically healthier as they age.



Experiences Worth Giving

Community partnerships can be a pathway to rewarding experiences for you as you create more connections to the people you serve. These partnerships also create the experiences that change lives. That could mean hosting a career night experience that introduces someone to the life-changing opportunity of a career in real estate to teaching Quantum Leap and an entire room of young adults unlocking their potential.



Legacies Worth Leaving

Community partnerships contribute to the legacy you leave such as:

- increased economic stability in your community through the wealth building power of home ownership and empowering young adults to discover their path to a fulfilled life.
- the gift of Profit Share and Growth Share providing for your family.
- the opportunity of careers in real estate to grow wealth and talent in your locality.
- any legacy your dream of leaving with the right community partner.



Benefits of Partnering with Multicultural Real Estate Associations

Engage a diverse client and associate base by partnering with multicultural real estate organizations. expanding perspectives regarding the local real estate market. Build and strengthen relationships with these organizations to:

- expand perspectives on the local real estate market
- increase diversity in your Market Center and associate businesses
- engage in advocacy efforts to increase access to credit and homeownership in your market

The National Association of REALTORS® (NAR) partners with [five national multicultural real estate organizations](#) to address shared real estate policy issues and to better serve REALTORS® who also hold membership in those organizations. NAR suggests that partnering with a local chapter or board of a multicultural real estate organization, this work can and has brought the following benefits:

Value and Respect

Associates already active in these groups who see that their input is sought, views valued, and talent and skills are engaged, see value in affiliation with their Market Center and Keller Williams. Seeing their local Market Center partner with these groups shows that their engagement, ideas, and leadership are respected and valued in both organization.

Leadership

Associates who are inspired to engage in association matters advancing real estate and community issues often build leadership skills that can benefit both organizations. Inclusion of diverse leadership in our industry strengthens the associate, the Market Center, and the multicultural organization.

Improved Policy and Program

Gain different perspectives from the members and leaders of all organizations. Variety of perspective helps create policy and programs that are relevant and inclusive to more of the market and your Market Center.

Increased Professionalism

Provision of professional services that are equitable requires an understanding of the needs and issues facing multiple communities. Engagement with multicultural real estate organizations opens avenues to community leaders and advocates to understand how Keller Williams associates can better serve the communities.

Expanded Influence

Community leaders and policy makers representing many local and national multicultural demographic groups are more likely to view our advocacy on real estate issues as coming from the communities and constituents they represent when they observe partnerships characterized by mutual respect and inclusion.

Benefits of Partnering with local, state, and national Real Estate Associations

Getting involved in committees and boards at the local, state and national level help represent all of our interests.

- [Access opportunities with NAR's REALTOR® Party Community Outreach Programs](#)
- [Find local and state associations](#)

Three Ways to Lead in Your Community

1. Mentor youth and young adults

Gary Keller developed Quantum Leap and established Keller Williams Kids Can (KWKC) to empower young adults to unlock their greatest potential through self-development events, coaching, and scholarships.

- Become a Quantum Leap Instructor
- Partner with organizations that serve young adults.
- Facilitate educational experiences that shatter limiting beliefs and help budding entrepreneurs, college students, and next-generation leaders define their personal mission and discover their path to a fulfilled life.



2. Educate your community on homeownership

Purchasing a first home can be confusing. Home buyer education classes can help consumers determine if homeownership is right for them and provide perspective and potential home owners with the information needed to begin the home buying process.

- Host home buyer workshops with and for your partner organizations
- Partner with an organization providing HUD-approved first time home buyer workshop and seek opportunities to teach the curriculum



3. Build careers and wealth for others

You have first hand experience with the life changing power of a career in real estate. Share the gift of a fulfilling career as a KW associate.

- [Familiarize yourself with the opportunity of KW Prep and KSCORE.](#)
- Host a career night with partner organizations.
- Invite members of the community to experience KW Prep and KSCORE.





Establish the Foundation

Build your team

Start with teamwork because together everyone achieves more. You will first need to identify your team. The foundation is Market Center Leadership including the ALC and the Equity Committee of the ALC. You may want to identify the following individuals in your market center:

KWKC instructor(s)

KWKC program-certified instructors volunteer their time to teach the Quantum Leap curriculum both online and at in-person events in their community. You will want to be sure that your KWKC instructors are aware and sensitive to any and all Social Equity issues that might exist in the audience they are serving. Ideally, your KWKC Instructor will have already taken both, The Color of Real Estate and Unconscious Bias.

- [Become a KWKC instructor.](#)
- [Research current KWKC instructors](#)

Who are the registered KWKC Instructors in your Market Center?

Name	Have they taken Color of Real Estate?	Have they taken Unconscious Bias

Who are the registered KWKC Instructors in your Region?

Name	Have they taken Color of Real Estate?	Have they taken Unconscious Bias

Are there other registered KWKC Instructors you would like to work with?

Name	Have they taken Color of Real Estate?	Have they taken Unconscious Bias

Home buyer workshop instructors

Home buyer workshops provide an opportunity for agents to share their skills and knowledge with members of the community. When you teach a workshop for first time home buyers, you can showcase your services to people who may potentially want to use you as their agent.

- [Learn how to systematize delivery of home buyer seminars](#)
- [Access the resources for your seminar](#)

Career night facilitators

Identify associates in your Market Center would like to facilitate career night workshops. Career night instructors must be approved by your local Market Center leadership.

- [Access the Career Night Toolkit with the latest information on KW Prep and KSCORE](#)
- Contact your Market Center leaders for approval process to become a career night facilitator
- Identify associates in your Market Center who are already approved to facilitate a career night

Who are the approved career night facilitators in your Market Center?

Name	Have they taken Color of Real Estate?	Have they taken Unconscious Bias

2

Create Your GPS

Develop the GPS that will lead to sustained partnerships.

Step 1: Identify the goal for your Community Partnership task force. Remember your goal should be:

- Specific and measurable
- Time bound
- Ambitious enough to require 2-4 priorities

Step 2: Decide on the 2-4 priorities you need to achieve to reach or surpass your goal. Think tactically about how many partnerships you will need and which partnerships will be a priority. Priorities should be:

- Measurable and specific
- Listed in order of importance
- Success on all of the priorities would create success in your goal

Step 3: Choose the strategies. For each priority you should have 3-5 activities that you must do to achieve the priorities. Consider who will own each strategy and maintain accountability for the activity. Craft strategies that are:

- Actionable
- Specific and measurable, you can easily tell either the action was completed to success or it was not
- Time bound, each strategy has a timeline for when the activity will be completed successfully
- Listed in order of importance

Step 4: Create a 12-week year/quarterly plan to follow.

- What strategies or activities need to be completed each week for each strategy?
- Who will make sure activity is completed?
- How will you leverage the [12 Week Action Plan Tool](#) to facilitate accountability?

Review the resources for how to create a GPS:

- [Crush Your Goals with a GPS](#)
- [The ONE Thing: Coaching to a GPS](#)

Identify Potential Partners

Choosing the right community partners is crucial to sustained success. Consider the following questions when looking for potential partners:

- Are there organizations the Market Center has an existing relationship through events such as RED Day that could become a community partner?
- Who are the agents in your Market Center who are deeply involved in the community and what organizations are they engaged with?
- Which organizations in your area serve the audiences you want to reach through partnerships?
- How will you vet each potential partnership organization? What are the criteria that will determine good fit and maintain equitable criteria to consider all potential partners?



4

Review the Principles of Effective Partnership

Adopt the ten principles of effective partnership:

1. Partnerships form to serve a specific purpose and may take on new goals over time.
2. Partners have agreed upon mission, values, goals, measurable outcomes, and accountability for partnership.
3. The relationship between partners is characterized by mutual trust, respect, genuineness, and commitment
4. The partnership builds upon identified strengths and assets, but also works to address needs and increase capacity of all partners
5. The partnership balances power among partners and enables resources among partners to be shared
6. Partners make clear and open communication an ongoing priority by striving to understand each others' needs and self-interests, and developing a common language
7. Principles and processes for the partnership are established with the input and agreement of all partners, especially for decision-making and conflict resolution
8. There is a feedback among all stakeholders in the partnership, with the goal of continuously improving the partnership and its outcomes
9. Partners share the benefits of the partnership's accomplishments
10. Partnerships can dissolve and need to plan a process for closure

5

Align Your Resources

Customize the Community Partnerships slide deck for your Market Center and for the organizations you want to work with.

Develop Community Partnership

- Community Partnership pitch deck
- Community Partnerships SmartPlan

Mentor Young Adults

- [KW Kids Can](#)
- [KWKC Community Partner Assessment form](#)
- [Access the Quantum Leap materials \(KWKC Instructor login required\)](#)
- [About KWKC slide deck](#)

Lead Home Buyer Seminars

- [Win Big with Seminars—KWU online course available on-demand](#)
- [Best practices for first-time home buyer seminars](#)
- [First Time Home Buyer Seminar slide deck](#)
- [Marketing checklist for First-time Home Buyer Seminar](#)
- [Home buyer seminar toolkit](#)

Facilitate Career Nights

- [Career Night: A Detailed, Step-by-Step Guide to Hosting](#)
- [Career Night Toolkit](#)
- [Enable closed captioning for your virtual career night](#)

Create Community Partnerships

Use the steps below to build relationships with organizations in your community.

1

Identify 3-5 local organizations

- Review the list of potential partners you developed in step three of Establish the Foundation.
- Choose which organizations you will reach out to first.
- Identify the program director or leadership person at each organization who can facilitate a partnership program.
- Use existing connections to the organization or the leader from your Market Center to make initial contact. If someone in the Market Center knows the leader or is a member of the organization, ask that person to facilitate an introduction and be part of the process.

2

Make the introduction

- Prepare for your calls by planning what you will say and how you will answer questions about why they should meet with you.
- Call the leaders of each organization and request a meeting. Be specific in the request and briefly share why you want to partner with their organization and how the organization will benefit from the partnership.
- Send a follow-up email to thank each leader for their time and confirm the date, time, and location for your meeting.

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.

3

Prepare for the meeting

- Review the mission and vision of the organization to determine where you can best add value.
- Determine what the expectations and needs may be of the organization.
- Identify which partnership value proposition is most aligned with the organization and the community they serve.
- Decide if you will offer to hold events specifically for this organization or if they will regularly refer individuals to existing events such as Market Center career nights and homeownership workshops.
- Edit your Community Partnership slide deck.

4

Meet with organizational leaders

- Ask questions about how your Market Center can be a partner in serving the community.
- Present your value proposition as a win-win opportunity.
- Create a plan together for how, when, and where events will occur. Be sure to include how you and your partner organization will promote each event.
- Decide how you will reciprocally stay in communication leading up to and between events.

5

Promote events

- Create marketing materials for your events using Designs in Command.
- Leverage [Career Night marketing materials](#).
- Leverage [KWKC marketing materials for Quantum Leap](#).
- Share social media graphics, registration links, flyers, and another marketing materials with your partner organization.
- Promote your event on social media channels, in the community, and through your sphere of influence.
- Gather sponsors from allied resources and local businesses to defray costs and provide cross-promotional opportunities.

6

Host your event

- Plan the location and event space. Choose a space with consideration for:
 - What venue will provide the greatest opportunity for attendance?
 - What venue(s) are perceived as welcoming versus unwelcoming by the community you want to reach?
 - What are the costs of the venue?
 - Is the space accessible to individuals with mobility constraints?
 - Is this location on a public transportation route?
 - If this is an online event, enable closed captioning.
- Select refreshments for the event with your audience in mind.
 - Remember that consumption of certain foods or alcohol may violate some attendees' religious beliefs. Be sure to include a variety of offerings so everyone is included.
- Capture leads from the event.

7

Follow up

- [Add contacts from the event to Command](#). Be sure to include tags to specify the event they attended.
- Add attendees to a SmartPlan based on the event
 - If you taught Quantum Leap, [create a mentoring SmartPlan](#) to encourage your potential mentees.
 - Use the [KW Prep or KSCORE SmartPlans](#) to follow up after a career night.
 - Add attendees from your first time home buyer workshop to a [monthly neighborhood nurture](#).

Join the Community Partnerships Committee

The Community Partnerships Committee's goal is to create powerful partnerships with existing community organizations and leverage the tools and resources available from Keller Williams to serve those communities and combine resources to reach a shared vision and mission. Through youth mentoring, offering home buyer workshops, and introducing people to the wonderful world of real estate, we believe that we are helping not only our associates, but members of our community to live out our mission - To build careers worth having, businesses worth owning, lives worth living, experiences worth giving, and legacies worth leaving.

The Community Partnerships Committee meets weekly. [Register to join future meetings.](#)

The community partnerships committee focuses on 3 main pillars:

1. Provide youth and young adult mentorship through KWKC

KWKC is a 501(c)(3) nonprofit dedicated to empowering young adults to unlock their greatest potential through self-development events, coaching and scholarships. Our interactive learning experiences shatter limiting beliefs and help budding entrepreneurs, college students, and next-generation leaders define their personal mission and discover their path to a fulfilled life.

2. Offer home buyer workshops

Purchasing a first home can be confusing. Home buyer education classes can help consumers determine if homeownership is right for them and provide perspective and potential home owners with the information needed to begin the home buying process. Most home buyer workshops include information on:

- Managing money
- Understanding credit
- Securing a mortgage loan
- Shopping for a home

You may choose to host your own home buyer workshops or partner with other organizations that are already providing this service. In many cases, if a prospective homeowner is using certain loan products they may be required to attend a HUD-approved curriculum. There may be an opportunity for real estate agents to assist in teaching at some of those workshops.

3. Changing lives through careers in real estate

The Keller Williams School of Real Estate – KSCORE*, was created to disrupt traditional real estate education by bringing people proven business strategies that support their thriving real estate careers. By pairing Keller Williams' unmatched training and tools with a completely digitized curriculum offered by Kaplan Real Estate Education's best-in-class real estate licensing and continuing education (available at zero cost to the prospect), the path to becoming a successful real estate agent has never been more comprehensive and accessible.

Hosting a career night is a fantastic way to showcase the boundless opportunities available when you pursue a career in real estate.

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