



A YEAR OF ACCOMPLISHMENTS

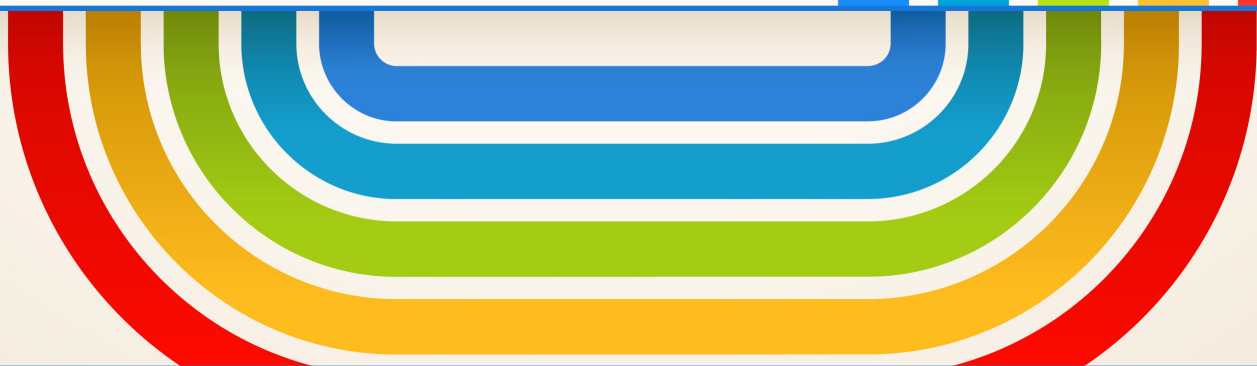


# 2019

## ANNUAL REPORT

UPSTATE ALLIANCE OF REALTORS®

[www.UpstarIndiana.com](http://www.UpstarIndiana.com)



# THE UPSTAR MISSION & VISION

## MISSION

To provide our members with technology, education and leadership necessary to conduct ethical and successful business while promoting, protecting and preserving real property rights.

## VISION

The Association is the recognized authority for REALTORS® and a trusted partner within our Communities.



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# What 2019 accomplishments do you feel were the most impactful?



**Beth Walker**

## **Beth Walker, 2019 UPSTAR President**

During 2019 we focused on increased member engagement and connecting with our Realtor members; this included traveling to meet with Realtors in counties outside of Allen. Communication with our new Realtor members remained a priority. We also focused our energy on member involvement in Leadership—both leadership training at the state level as well as diversifying those Realtor members serving on our boards and committees.

The shortage of inventory of homes for sale in 2019 created unique challenges with regard to enforcement of our Code of Ethics, Professional Standards as well as MLS rules. Many thanks to the Realtor members who served tirelessly in leadership, participating in tough conversations regarding these challenges.

Serving as your Board President has proven to be a more rewarding experience than I could have imagined. Leadership at this level has also made me a better Realtor. Thank you for your support and for your words of encouragement throughout the year. It was my pleasure to serve as your 2019 UPSTAR Board President.



**Katrina Kay**

## **Katrina Kay, Executive Officer**

With my retirement quickly approaching, this is a bittersweet occasion as I write my last annual report message. The past 16 years have been a whirlwind. With your support, we have accomplished some lofty goals, launched numerous new services and enjoyed many fun events along the way. Twenty Nineteen was no exception.

While I could mention several initiatives that I believe were impactful this year, as a member of the Board of Directors for the Beverly Carter Foundation, I have to highlight my passion—Realtor® safety. I'm particularly proud of the work UPSTAR has done with safety in 2019. We formed a safety committee in the spring and established the mission: *"To promote safety and well-being for UPSTAR members by raising awareness, improving processes, and communicating best practices."* By the end of summer, we had completed eight safety videos and committed to a proactive communication campaign to raise awareness of situations that present cause for concern. With that said, I remind you to be prepared, be aware and be safe out there.

To every association leader, Realtor®, Affiliate and staff member, thank you for your support, encouragement, and direction over the years. I will treasure the memories.

Farewell.

# 2018-20 | 3-YEAR STRATEGIC PLAN

UPSTAR Board of Directors approved a three-year strategic plan in 2018 focused on five goals to carry UPSTAR into the future as a strong, stable, member-focused organization that delivers relevant services to its membership. The Board has set objectives and tactics to reach each goal.

## INDUSTRY ADVOCATES

### GOAL #1

UPSTAR is seen by the public, media and elected officials as the leading advocate for community issues affecting real estate, private property rights and real property ownership.

## COMMUNITY INVESTMENT

### GOAL #2

UPSTAR promotes the REALTOR® image in the community, provides reliable information, and invests in the community through its involvement and charity.

## MEMBER FOCUSED

### GOAL #3

UPSTAR consistently provides superior customer service, member-focused programs and support.

## FINANCIALLY STRONG

### GOAL #4

UPSTAR provides an environment that is progressive, stable and financially strong, enabling it to move effectively into the future.

## PROFESSIONAL ETHICS

### GOAL #5

Members consistently practice professional and ethical behaviors for the benefit of their clients and customers and colleagues.

## LEADERSHIP

### 2019 UPSTAR BOARD OF DIRECTORS



BETH WALKER  
President



RENÉE COX  
President-Elect



ADAM SMITH  
Secretary/Treasurer



MARY MAUGER  
Past President



ANGIE BUCHS



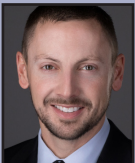
DAVE DEHAVEN



TONY DIDIER



RON KING



PATRICK MALOBLOCKI



ED McCUTCHEON



TERRY MILLER



KYLE NESS



WILL ROGERS



MARY SHERER



TODD STOCK



ISAAC STOLLER

### 2019 UPSTAR MLS BOARD OF DIRECTORS



MARY MAUGER  
MLS President



RENÉE COX



JANEL CAIN



MARK DIPPOLD



GREG FAHL



SAM HAIFLICH



AARON HOOVER



ANDREW JAGODA



LARRY McCHESNEY



KURT NESS



LOU ROWLAND



TAMRA STIER



JIM TORRES



JEFF WALBORN



# COMMUNITY OUTREACH

## 2019 Highlights

### Supporting Housing Related Charities

UPSTAR holds several member events each year that have a charitable component. The events seek monetary and/or material donations for one of the association's designated charities—all of which have a housing related service or program as a part of the organization. Following are the event highlights for 2019, which raised nearly \$7,000 for three of our designated charities:

- **Pancake Breakfast** (Affiliate-Realtor networking event)  
**Charity:** **Just Neighbors** – serving homeless families by uniting religious congregations, community volunteers and local agencies in a cooperative effort to provide shelter, meals, and compassionate, comprehensive professional support. **Amount Raised:** \$2,110
- **UPSTAR Golf Outing** (social-networking event)  
**Charity:** **Vincent Village** – providing shelter, care, advocacy, affordable housing and support services for homeless. **Amount Raised:** \$2,351
- **Oktoberfest** (social-networking event)  
**Charity:** **Whittington Homes & Services** – striving to keep families together in their homes through life skills training. **Amount Raised:** \$2,500



### Community Outreach Initiatives

UPSTAR's Community Outreach Program provides opportunities for REALTORS® to "give back" to the communities they serve. UPSTAR members provide home repair and maintenance services for community charities or local residents referred by agency partners, contribute material donations, or provide volunteer service. UPSTAR performed the following work in 2019 on behalf of the community:

- **Day of Caring**  
UPSTAR conducted three Day of Caring initiatives— completing lawn maintenance, landscaping and/or painting jobs on 7 homes for local residents and interior cleanup and painting on one Vincent Village house through our partnership with NeighborLink.
- **Great American Cleanup**  
This year, UPSTAR's Community Outreach volunteers also participated in the Great American Cleanup, designed to aesthetically improve our environment by creating cleaner parks, streetscapes, and public spaces through litter removal and elimination.



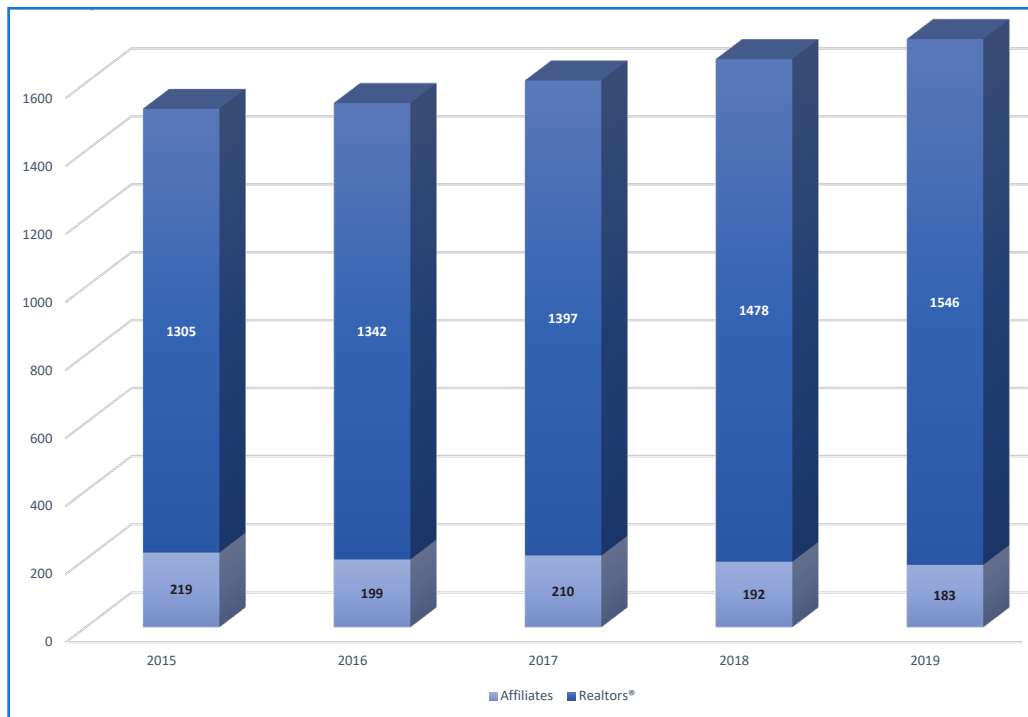
# UPSTAR MEMBERSHIP

## By the Numbers

By the end of 2019, the UPSTAR membership, which includes Realtor® members and Affiliate members, had grown approximately 4.6 percent, as compared to 2018. The benefits of membership grow exponentially to the degree that members get involved with the education, training, events, networking, advocacy and service opportunities available at UPSTAR.

Member engagement makes this a great association.

TOTAL MEMBERSHIP AT YEAR END



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NMLS# 1373263  
260-489-4621

**Larry Lechel**

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# EDUCATION

## UPSTAR School of Real Estate



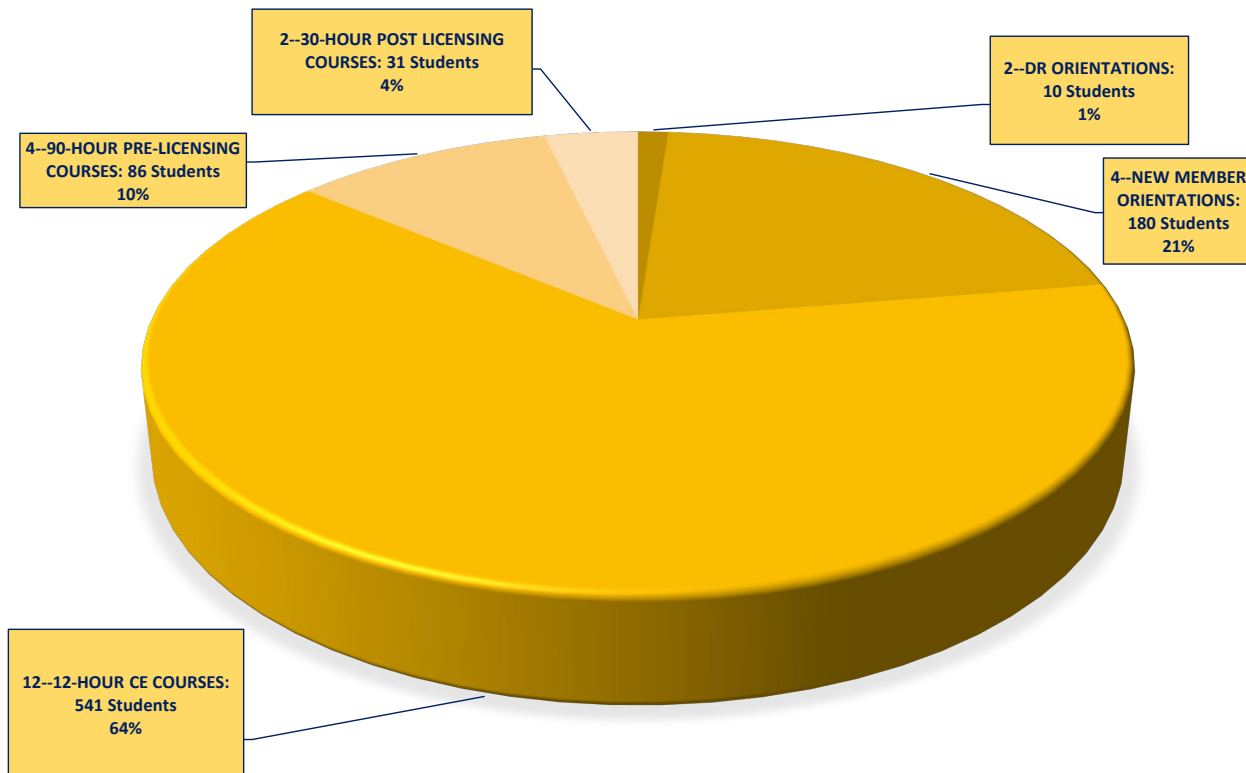
When members, as well as students outside of our association, choose **UPSTAR School of Real Estate** as their education provider, the association is able to enhance its programs and services for the benefit of all members.

The success of UPSTAR School of Real Estate is one of the reasons the association enjoyed multiple years without a dues increase.

TOTAL EDUCATION  
CERTIFICATES  
AWARDED IN 2019

848

### 848 Certificates - Percentage by Class



### Lunch n' Learns

In addition to courses for educational credit, the association hosts Lunch n' Learns—informal educational presentations on real estate related topics, usually conducted by UPSTAR affiliate members. From downpayment assistance programs and title insurance updates, to home inspection and staging, UPSTAR's affiliate industry experts help REALTORS® serve homebuyers and sellers more effectively.

TOTAL STUDENTS  
ATTENDING 9  
LUNCH N' LEARNS  
IN 2019

81

# 2019 FOCUS ON SAFETY

## UPSTAR Expands Realtor® Safety Initiative

Following consecutive visits in 2017-18 from national Realtor safety advocate **Carl Carter from the Beverly Carter Foundation**, UPSTAR formed its own safety committee in the spring of 2019 to raise awareness of Realtor safety on the local level. By the end of 2019, the safety committee, in collaboration with the staff, established a mission, produced eight safety videos and distributed multiple Realtor safety alerts by email and text. Check out the 2019 UPSTAR Realtor Safety Program timeline below:

### UPSTAR 2019 SAFETY TIMELINE

**May 20**

UPSTAR Safety Committee is formed and holds first meeting.

**Jun 11**

UPSTAR Safety Committee creates their mission statement which states: *The mission of the UPSTAR Safety Committee is to promote safety and well-being for UPSTAR members by raising awareness, improving processes, and communicating best practices.*

**Jul 3**



1st Safety video published—covering the dos and don'ts of how to meet and process new clients.

**Jul 25**



2nd Safety Video published—covering the dos and don'ts of conducting open houses.

**Aug 26**



3rd Safety Video published—covering the dos and don'ts of conducting a private showing.

**Sep 10**



4th Safety Video published featuring Angela Grable sharing Part 1 of her personal experience regarding Realtor safety.

**Sep 17**



5th Safety Video published Angela Grable shares Part 2 of her personal experience regarding Realtor safety.

**Sep 24**



6th Safety Video published—covering the dos and don'ts of having visitors at an open house sign in.

**Oct 11**



7th Safety Video published—covering the dos and don'ts of parking before a showing.

**Dec 26**



8th Safety Video published—covering more tips on the dos and don't of conducting open houses.



# 2019 AFFILIATE PARTNERS

*Thank you! UPSTAR appreciates your support.*



## AFFILIATE EVENTS



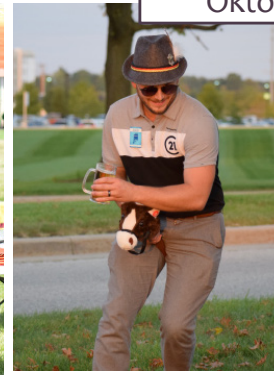
Pancake Breakfast



Golf Outing



Oktoberfest





# MORE FABULOUS EVENTS ...



April GMM



December Holiday GMM



Merry Christmas



UPSTAR Night at the Civic



Merry Christmas



Merry Christmas



# UPSTAR YPN

## 187 Members Strong

(Up 25% from 2018)

UPSTAR's Young Professionals Network (YPN) exists to develop young-at-heart professionals in the REALTOR® family through association involvement, advocacy, peer networking and community outreach. Following are the highlights for 2019:

- **MEMBERSHIP:** Increased YPN Members to 187.
- **EDUCATION:** Held three membership meetings, including two with educational presentations—one by Ryan Cybulski on “Business Coaching” and one with Renee Cox and Jeff Vaughan on RPAC. The last membership meeting also featured the election of the 2020 officers.
- **NETWORKING:** Hosted several networking events: Two Bus trips (Lake Wawasee and Firekeepers Casino); a Member Appreciation Potluck; a March Madness event, a Halloween Bash and four Brew Tours.
- **COMMUNITY OUTREACH:** UPSTAR YPN touched our communities by supporting people in need and remembering those who served.

### *Here's what they did:*

- Participated in two UPSTAR Community initiatives including The Great American Cleanup and Day of Caring.
- Participated in a 911 Commemorative Walk remembering those who lost their lives in the 911 attacks.



911 Remembrance Walk



Bus Trip to Firekeepers Casino



Halloween Bash



Quarterly Brew Tours



March Madness



Wawasee Boat Cruise

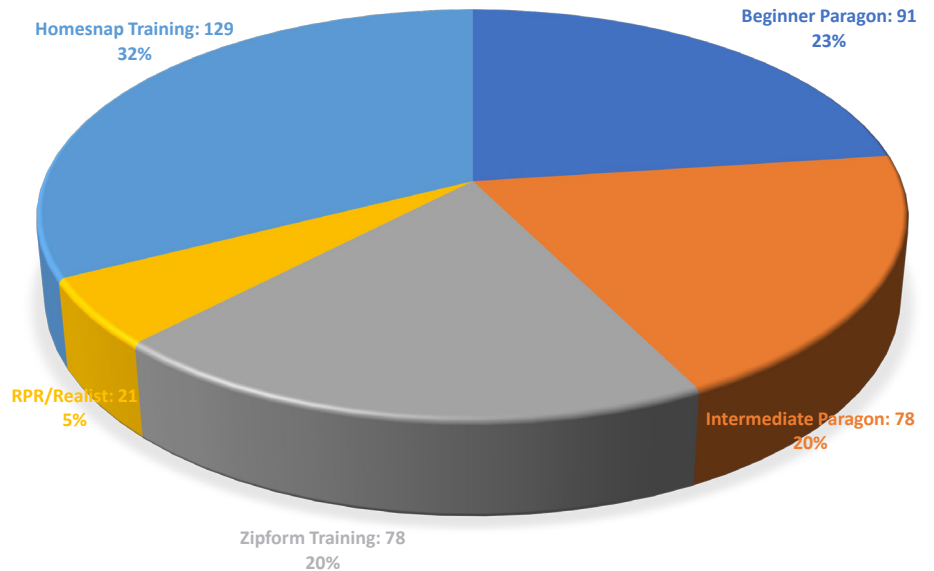
# MLS & TECHNOLOGY

## 2019 Tech Training & Highlights

Total Students Attending Tech Training Classes in 2019

397

### 397 Students - Percentage by Class



### Social Media Stats



Social Media Outlet	Year End	Percent Change
YouTube Views	4,200	+133%
Facebook Likes	857	+23%
Twitter Followers	164	+5%
Instagram	173	N/A



Following the results of the April 2019 MLS audit, UPSTAR rolled out an MLS compliance education campaign to help members better understand how to comply with MLS rules in a variety of situations. Titled “MLS Compliance Corner”, the e-newsletter covered topics on updates and changes to MLS rules. It also provided MLS audit information, explained how to manage listings within compliance, and offered attorney updates regarding compliance to the law.

Four Compliance Corner newsletters were emailed to MLS Subscribers and assistants in 2019. Here are a few of the MLS topics these newsletters covered:

- How to comply with MLS rules when your client wants to push out the effective date?
- How to comply with MLS rules when you already have a buyer?
- Contingencies noted in the marketing remarks.
- Late entry solds and the 48-Hour rule.
- The rule concerning changes to the BAC.
- How to comply with MLS rules when the seller wants to exclude his/her listing from the MLS.



# GOVERNMENT AFFAIRS

## & Economic Development Highlights

UPSTAR's Government Affairs Department advocates for the private property rights of homeowners and the business interests of REALTORS® in local government, which include support for economic development initiatives that promote the growth of Northeastern Indiana. The association also works in cooperation with the Indiana and National Associations of REALTORS® to support their advocacy efforts on a state and federal level.

### LOCAL HIGHLIGHTS

#### 2019 Local Elections

- The RPAC Trustees spent two weeks interviewing 40 candidates for the general election. We supported 18 local candidates and 13 of those candidates won their bid for election.

#### Other Local Highlights

- Updated the Allen County Septic Ordinance—removing the fine for not filing a disclosure form.
- Huntington County is looking into the feasibility of combining their sewer district.
- Following the approval of its Sewer District, Whitley County is working on interlocal agreements between the communities to begin projects.
- After the state legislature approved a process allowing an increase in the innkeepers tax from 7 to 8 percent, the County Council approved the increase to fund Visit Fort Wayne's effort to promote Allen County.
- Worked out a compromise that was more supportive of neighborhoods—regarding a Fort Wayne ordinance involving the zoning of gas stations.

### STATE HIGHLIGHTS

About 1300 bills were filed and just under 300 were passed during the 2019 state legislative session.

The General Assembly passed the biennium budget late into the evening to finish session. The bill appropriates money for capital expenditures, the operation of the state, K-12 and higher education, the delivery of Medicaid and other services, and various other distributions and purposes.

### FEDERAL HIGHLIGHTS

- Flood Insurance – NAR continues to work on a five-year plan to modernize the flood maps and the rating system.
- Association Health Plan – NAR continues to work with partners and wrote an amicus brief to the Supreme Court to support our position.
- The House passed H.R. 1595, the “Secure and Fair Enforcement (SAFE) Banking Act,” by a bipartisan vote of 321 - 103. This bill, cosponsored by Representatives Ed Perlmutter (D-OR) and Steve Stivers (R-OH), creates a safe harbor for federally-insured financial institutions to provide services to cannabis-related businesses in states that have legalized the substance.
- The U.S. Department of Housing and Urban Development (HUD) released the long-awaited final rule on project approval for single-family condominiums insured by the Federal Housing Administration (FHA). For many years, NAR urged HUD to finalize changes to the previous rule that would ease restrictions on FHA financing for condominiums, thus enabling more first-time buyers, older adults, and low to moderate-income families to achieve the dream of homeownership.

### ECONOMIC DEVELOPMENT

Allen County continued its progress in 2019 by completing new quality of place projects such as Promenade Park. The Fort Wayne area has been America's hottest real estate market five months in a row. We have had over \$1 billion in building permits for three consecutive years, and a record number of domestic migrations, which demonstrates our community's ability to attract and retain talent.

- 21 Deals
- 1187 new jobs
- \$52.3 million in new annual payroll
- \$139 million in new investment



# THE REALTOR® PARTY

## RPAC | REALTORS® Political Action Committee

**55.38%**

**3**

**2**

**18**

**TOTAL RPAC CONTRIBUTIONS**

**Percent of Total Raised from RPAC Event**

**No. of Golden "R"s (\$5,000+)**

**No. of Crystal "R"s (\$2,500+)**

**No. of Sterling "R"s (\$1,000+)**

UPSTAR extends a huge "thank you" to ALL RPAC contributors in 2019. From the "Fair Share Level" (\$15 - \$98) to the "Golden R" level (\$5,000+), every contribution helps. Following is a list of contributors at the 99 Club level and above.

### 99 CLUB

(\$99 - 249)

Cory Allen  
Judy Baumgartner  
John Bellam  
Stacie Bellam-Fillman  
Cindy Bluhm  
Tamara Braun  
Timothy Brower  
Angela Buchs  
Lisa Campbell  
Thomas Cheviron  
Jacqueline Clark  
David DeHaven  
Mark Dippold  
Jennifer Duff  
Andy Eckert  
Ann Fahl  
Neil Federspiel  
Tammy Fendt  
Leslie Ferguson  
Cyndee Flechter  
Mindy Fleischer

Holly Fogwell  
Brittany Grabner  
Sandi Gratz  
Robert Grawcock  
Linda Green  
Robert Griebel  
Cynthia Griffin-Malone  
Kimberly Haneline - Patmore  
Angela Harouff  
Patrick Harris  
Joshua Harrison  
Justin Herber  
Linda James  
Jerry Jenkins  
Chelsea Johnson  
Lynette Johnson  
Susan Kinney  
Brooks Langeloh  
Phil Laux  
Erica Lehman  
Michael Litchin  
Jeremy Luther  
Anna Marquardt

Laura Martinez  
Jack McCombs  
David McDaniel  
Hollie McQueary  
Terry Miller  
Donna Miller  
Brian R. Miller  
Jonathan Morales  
Darlene Nelson  
Steve Ness  
J. Kyle Ness  
Tony Picillo  
Heather Regan  
James Ringswald  
Will Rogers  
Chris Sanderson  
Jeffrey Schenher  
John Schindler  
John-Michael Segyde  
Margaret Sklenar  
Brooke Sommers  
Kristina Stickler  
Joyce Swartz  
Sue Teasdale

Jennifer Timms  
Justin Walborn  
Justin Wall  
Carl Ward  
Nancy Weigelt  
Ric Zehr  
Andy Zoda

### HOOSIER R

(\$250-\$499)

James Bradley  
Robert Caley  
Tony Didier  
Gregory Fahl  
Aaron Hoover  
Son Huynh  
Laura Kinner  
Craig Martin  
Steven McMichael  
Todd Miller  
Joe Mishak  
Michelle Partin  
Hollie Quesinberry

Lori Sanchez Ertel  
Timothy Tower  
Gina Wagner  
Jeffery Walborn  
Rick Widmann

### REALTOR 500

(\$500-\$999)

Beth Goldsmith  
Jody Holloway  
Jackie McBride  
Ken Steury  
Todd Stock  
Isaac Stoller

### STERLING R

(\$1000-\$2499)

Gregory Brown  
Katie Brown  
Robert Coffee  
Katrina Kay  
Patrick Maloblocki  
Mary Mauger

Kurt Ness  
Jan Sanner  
Mary Sherer  
Adam Smith  
Al Snyder  
Tamra Stier  
Jim Torres  
Jeffrey Vaughan  
Pone Vongphachanh  
Elizabeth Walker  
Kimberly Ward  
Brenda Williams

### CRYSTAL R

(\$2500-\$4999)

John Bellio  
Renee Cox

### GOLDEN R

(\$5000+)

Ed McCutcheon  
Thomas Rayl  
Bette Sue Rowe

### 2019 LONGEVITY AWARD INDUCTEES

#### HALL OF FAME

Lifetime Contribution of \$10,000 or more

#### REALTOR® PARTY

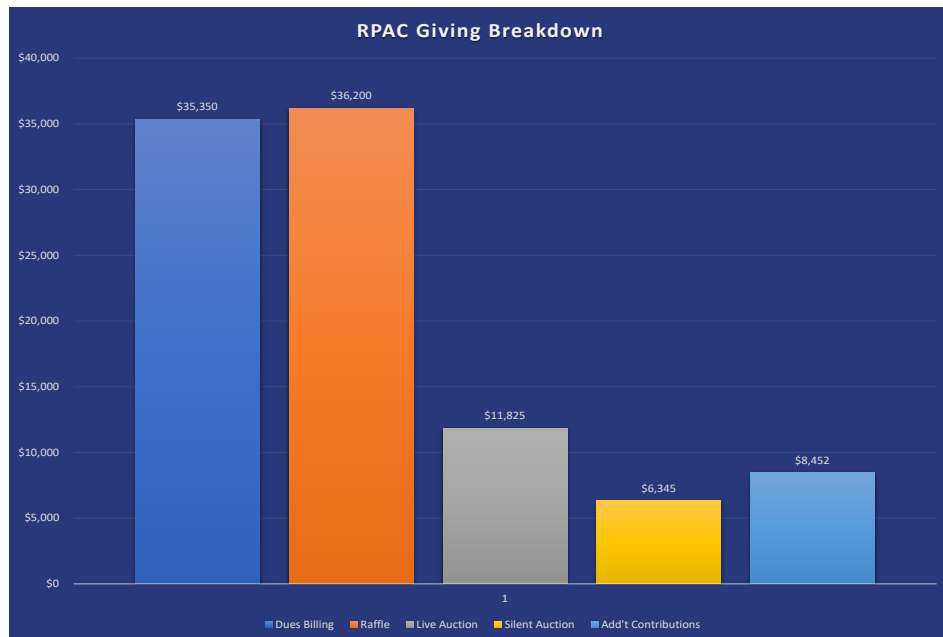
##### CHAMPION

10 Years of Giving Above \$250

#### RPAC RISING STAR

5 Years of Giving Above \$250

## 2019 RPAC Event Brings in \$54,370 of Total RPAC Giving

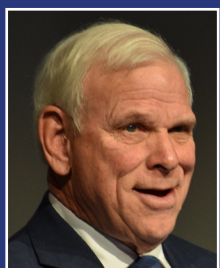


# 2019 SERVICE AWARD RECIPIENTS

## Isaac Stoller named REALTOR® of the Year



The REALTOR® of the Year award is given to a member who has exemplified a level of professionalism and servant leadership in meeting the needs of the public, serving the association and real estate industry, as well as the community at large. **Isaac Stoller, Coldwell Banker Holloway**, was named REALTOR® of the Year for his reputation in the industry as a person of integrity who conducts business with high standards and treats everyone with dignity and respect. In the community, Isaac is one of the first to volunteer for community service projects and also serves as a volunteer auctioneer for the Wells County local Creative Arts Council. For the association, Isaac serves on the Government Affairs Committee, the Board Development Committee and the UPSTAR Board of Directors. He is a YPN member, and a recent Graduate of the Indiana Realtors Leadership Academy and serves on the Board of Directors for the Indiana Auctioneers Association. Additionally Isaac is a strong supporter of RPAC.



### Jeff Vaughan Hall of Fame Award

The Hall of Fame Award is given for outstanding service to the association, real estate profession and community over a lifetime. **Jeff Vaughan, CB The Real Estate Group**, received the 2019

Hall of Fame Award for his long-term commitment to UPSTAR. Jeff, a past president, has served on numerous boards and committees throughout the years. And today, he is still a strong champion and advocate for UPSTAR in local government and the community.



### Jessica Maxwell Affiliate of the Year

The Affiliate of the Year Award is given to an affiliate member who goes above and beyond expectations to support the association. UPSTAR

honored **Jessica Maxwell, Aardvark Home Inspectors**, for her dedicated service and hard work at Affiliate events and community outreach projects and for doing so with great enthusiasm.



### Tamra Stier Outstanding Service Award

**Tamra Stier, Rockfield Realty Group**, was selected as the 2019 Outstanding Service Award recipient for her dedicated service

to UPSTAR in multiple roles this year, for her committee leadership, and for her positive approach in resolving complex issues.



### BBB Task Force Special Project Award

The following people were honored for their work in putting a plan together to save the Buyer-Seller

Mediation Program through the Better Business Bureau. They are: Todd Stock—Chair, Renee Cox, Vickie Harding, Mary Mauger, Patrick Maloblocki, Ed McCutcheon, Kyle Ness, Beth Walker, Katrina Kay and Mary Sherer.



### Adam Smith President's Award

President Beth Walker selected **Adam Smith, CB The Real Estate Group**, as a recipient of the 2019 President's Award because he has been a great asset

during her presidential term. Beth said she has watched Adam grow into a very effective leader—describing him as prepared for meetings, understanding of associations, always helpful, one who asks good questions, keeps her on track, is committed, positive, encouraging and makes her laugh.



### Katrina Kay President's Award

President Beth Walker also selected **Katrina Kay, UPSTAR Executive Officer**, as a recipient of the President's Award. Beth said Katrina

was top of mind for this honor because of her tremendous support. *"I absolutely could not have done the work required from this office this past year without the continued help, support and encouragement of Katrina," said Beth.*





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