

REALTOR® A/E

NAR.REALTOR/RAE

What Kind of AE Are You?

Hint: A little bit of each Page 10



How your job as an AE has changed over the years

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REALTOR® AE

Winter 2018

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The REALTOR® AE editorial board reviews each issue and provides critical feedback, proposes story ideas, and stays in touch with fellow AEs nationwide to scout out new programs and products to share with the AE community.

To join the editorial board, write an article, or contribute information, email Carolyn Schwaar, editor, REALTOR® AE magazine, cschwaar@realtors.org.

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The Changing Role of Today's AE



Rebecca Grossman, RCE, GREEN, CEO, Scottsdale Area Association of REALTORS®, Ariz.

I love the theme for this issue because like many of you, my role as AE is always changing and presenting new challenges. But I think we can all agree that these changes make our world interesting and allow us to continue to retool ourselves and our abilities. I, for one, never imagined when I first started out that I would have to do things like manage lease space, navigate through MLS mergers, deal with the fallout of a failed association merger, start up a meeting and event space business, teach short sales and foreclosure classes, endure plummeting membership numbers during the hard times, launch a real estate licensing school, sing at installations, and jump on a float for a parade. These are just a few of the many roles we all play, and I can't wait to see what comes next.

We always talk about raising the bar for our members, but more and more that bar is raised for us. We must continually prove ourselves to a new group of leaders and volunteers. As we seek to accommodate added responsibilities and expertise necessary to keep our associations strong, we need to be able to articulate our value and make sure

that we are sustained through adequate compensation, benefits, educational opportunities, and staff resources. A great time to do this is during your annual review, so be prepared to share what you are proud of and what you have taken on for the year.

I am very excited about the topics being covered in this issue and the contributors, whom I know and admire. Like me, many of these great AEs didn't choose association management as a career but have embraced all the challenges it brings and have made significant impacts in their organizations and communities. They know how to adapt to change and, when called upon to make something happen, they allowed their roles to grow without complaining and kept a

sense of humor when things got tough. I know you will find what they have to share extremely valuable, and I thank them for sharing their expertise.

One thing I have learned over the years is to allow things to happen. When your association members want to move in a certain direction, help them get where they want to be. Sometimes as AEs we must set aside our concerns over changing roles and let our organizations take risks and reinvent themselves. Along the way, we need to educate the leaders on the impact and ensure that they are giving us the necessary resources, but at the end of the day we can't be a roadblock.

Make it a great 2018!



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Time to Focus on Fair Housing Issues

Associations recall a painful past, mark progress since the 1968 passage of the Fair Housing Act

State and local associations are gearing up for a year of commemorating the 50th anniversary of the Fair Housing Act by planning events, education, and communications that focus on what housing equality means in their states and local communities.

The Massachusetts Association of REALTORS® is dedicating space in each issue of its print publication to fair housing stories, the Illinois Association of REALTORS® created a video to spur conversation on the topic, the Northern Virginia Association of REALTORS® is helping sponsor regional training on fair housing, and the Maryland Association of REALTORS® is launching a “50 Days to the 50th Anniversary” social media campaign with a post each day leading up to April 11, the day 50 years ago, that Congress passed the Fair Housing Act.

Maryland’s social media campaign will include posts that cover the history of fair

housing (both national and state), specifics about protected classes, notable successes in overcoming housing discrimination, how to file a discrimination complaint, local organizations and resources, HUD videos, and more, says Laurie Benner, director of housing programs at the association. A gala event at the Reginald F. Lewis African American History Museum in Baltimore, now in the planning stages, says Brenner, will bring together housing and civil rights professionals from across the state.

Events are also planned at the Beverly Hills/Greater Los Angeles Association of REALTORS®, the New Mexico Association of REALTORS®, and the Charlotte Regional REALTOR® Association, N.C.

In L.A., CEO Chip Ahlswede says his association’s event, scheduled for April, will bring together all of the multicultural real estate associations in his area, including the National Association of Hispanic Real Estate

Professionals®, the Asian Real Estate Association of America, the National Association of Real Estate Brokers—the oldest minority trade association in America—and the National Association of Gay & Lesbian Real Estate Professionals.

Several associations are turning to video storytelling to feature REALTORS® who lived through segregation, blockbusting, and racial steering. The Illinois Association of REALTORS® video features Frank Williams, who fought against housing discrimination in the 1960s and throughout his 45-year career in real estate (pictured here in an

1789
Private Property Rights
5th Amendment to the Constitution protects property rights. Slavery, court cases, and legislation denied the rights to African Americans, Latinos, Asian Americans and other minorities.

1866
The Civil Rights Act of 1866
Provides that all citizens have the same rights to real property as white citizens. Court cases, immigration law and racially defined zoning deny these rights.

1917
Racial Zoning Outlawed
The Supreme Court voids zoning based on race. Property owners, real estate interests and local governments on deed restrictions based on race and religion. Laws and practices continue to deny property rights based on race.

1948
Restrictive Covenants Not Enforceable
The Supreme Court voids federal court enforcement of racially restrictive covenants. A growing fair housing movement passes first fair housing laws in New York and Colorado in the 1950s.

1968 FAIR HOUSING ACT

NAR firmly believes in equal opportunity in housing. No person in this country should have the right to rent or purchase, shelter of choice abridged because of race, color, religion, sex, handicap, familial status, national origin, sexual orientation or gender identity. Furthermore, these rights should not be limited because of existing or desired

NAR fair housing ad).

If you haven’t already planned coverage, there’s still time to join in the commemoration by discussing, posting, sharing, and publishing some of the resources the National Association of REALTORS® has created that support new approaches to fair housing issues and highlight the value that fair housing brings to the industry and your community.

Now, at FairHousing.realtor, find fair housing campaign materials, including flyer and email templates; customizable print and banner ads; articles, videos, and written content. New and refreshed member training materials will emphasize the importance of awareness, understanding, and compliance with the Fair Housing Act.

The NAR campaign will coordinate with multicultural real estate organizations featuring pioneers and leaders throughout our industry. Their activities will be highlighted at the 2018 REALTORS® Legislative Meetings in Washington, D.C., as well as a special event at the Smithsonian National Museum of African American History and Culture that week. For more resources and to get involved, visit FairHousing.realtor.

FAIR HOUSING MAKES U.S. STRONGER

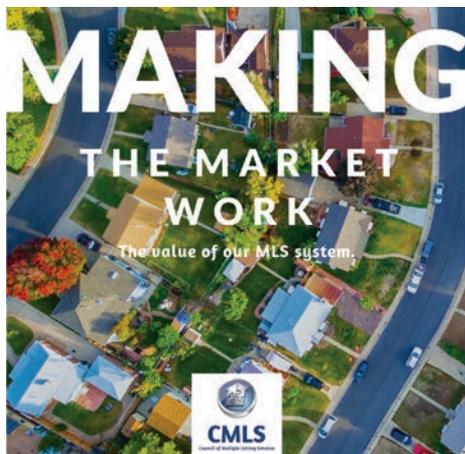
*Frank J. Williams, REALTOR®
Chicago, IL*

“There weren’t any people that looked like me.”

Frank Williams has witnessed a lot in nearly 80 years. After growing up in Flint Michigan — and being expelled from high school for dating the white girl he later married — he moved to Chicago in 1962. Despite having never considered real estate as a career because, “as a young black man, we didn’t see many people in our community in positions of power,” he received his real estate license in 1966 and opened his own firm in 1969. His practice faced immediate resistance for helping African Americans find homes in historically white neighborhoods. In 1971, demonstrators entered his office to demand who he could sell to, and in 1975, his home was firebombed. Overcoming these obstacles, he ascended to president of the Chicago chapter of the NAACP, president of the Chicago Association of REALTORS®, and was voted REALTOR® of the Year. “As a black American, a REALTOR®, and a parent, I am determined to help erase discrimination from the housing landscape.”

NAR, CMLS Offer MLS Resources

In the current real estate landscape, there is a call for MLSs to create a structure that is responsive to local broker needs while continuing to facilitate an orderly marketplace. For many, this means consolidation, yet even the word “consolidation” brings images of loss and destruction, fear and distrust. But the National Association of REALTORS® and the Council of Multiple Listing Services say that with better information and resources, MLSs can assess how to overcome challenges and mitigate member frustration.



Whether through consolidating, merging, data and technology sharing, group buying, or administrative support agreements, MLSs have removed barriers that create inefficiencies and empowered participants and subscribers to focus on serving the consumer. In the new MLS Consolidation Resources tool kit created jointly by NAR and the Council of Multiple Listing Services (CMLS) and available at nar.realtor, you'll find innovative and progressive ideas on how to move the industry forward while maintaining the MLS as the cornerstone for an orderly marketplace. The tool kit also features MLS success stories, a list of specialized consultants, and a “MLS Consolidation Activity Report” that tracks the actions currently underway nationwide.

One of the most recent MLS mergers

is between the Carolina Multiple Listing Services and the North Carolina Mountains Multiple Listing Services, completed in January. The consolidation process started more than 10 years ago and is detailed in a case study that is part of the MLS Consolidation Resources. The study details the main drivers of the consolidation, the leadership's decision-making processes, and how technology, financial, and governance issues were reconciled. Visit the kit's “Success Documents” section for an updated list of articles, studies, videos, and news on MLS optimization strategies.

Complementing the MLS Consolidation Resources, CMLS has launched a nationwide campaign highlighting the value of the Multiple Listing Services system. The campaign's slogan—“Making the Market Work”—communicates the fundamental place the MLS holds as a guarantor of basic principles real estate professionals rely upon.

The campaign, which was previewed at the 2017 NAR Legislative Meetings and Trade Show in Washington, D.C., is centered on three core benefits that the MLS system provides. The first is confidence: The MLS safeguards market information and enforces rules that govern market participation. This allows real estate professionals to do their jobs with a confidence that would not otherwise exist. Second is connections: The MLS creates connections between professionals with properties to sell and those with clients who may buy them. It is the platform on which those who make transactions happen come together. The last benefit is community: The MLS sustains a dynamic community of professionals where competitors cooperate to make homeownership happen.

For more resources, including print-ready promotional materials, social ad templates, and a marketing guide for the campaign (only available to CMLS members), visit councilofmls.org.

Congratulations AE Award Winners



Peggy Mead, AE at the Sierra North Valley REALTORS®, Calif., was honored at the 2017 REALTORS® Conference & Expo in Chicago with the Terry McDermott

Community Leadership Award, for her work to found a community group that connects people in need with the goods that are needed. Mead also spearheaded construction and operation of a transitional living facility for women and children called the House of Hope.



Gavin Blair, RCE, CEO of the Iowa Association of REALTORS® (*left*), and **Mike Valerino**, RCE, CEO of the Akron Cleveland Association of REALTORS®, Ohio (*right*), both received the National Association of REALTORS® 2017 AE Leaders of Tomorrow Award, which recognizes AE young professionals who foster greater involvement and increased professionalism among their YPN AE peers and REALTOR® members.

Tessa Hultz, RCE, CAE, CEO of the Raleigh Regional Association of REALTORS®, **Deb Junkin**, RCE, CEO of the Georgia Association of REALTORS®, and **John Sebree**, RCE, CEO of the Missouri REALTORS® were inducted into the Dr. Almond R. (Bud) Smith, RCE, AE Leadership Society during the 2017 REALTORS® Conference & Expo. Members of the Society are recognized as being active, ongoing leaders, innovators, and mentors for the AE community.

Who Are Your Local Good Neighbors?

Launching a program to honor members who do good work in your community is easier and more beneficial than you think.

Did you realize that some of your members are doing incredible volunteer work to help improve the lives of others? In fact, you may not know, because the people doing this kind of altruistic work are often the least likely to seek attention. But that doesn't mean they don't deserve the spotlight.

REALTOR® associations nationwide have discovered that there are powerful benefits to uncovering these hero-next-door stories and sharing them with the membership, media, and public. Your members' volunteer work may range from feeding the homeless to helping people overcome addictions to mentoring disadvantaged children. These stories strike an inspiring chord, whether or not the volunteer work is related to real estate or housing.

The National Association of REALTORS® runs an annual Good Neighbor Awards program—as do many state and local associations (see sidebar)—to identify REALTORS® who are making an extraordinary impact through community service.

Typically, the programs run like this: There is a call for nominations, a panel of two to five judges who select the winner, an announcement of the winner and publicity about the winner's impact on the community, and a grant award donated to the charitable cause.

NAR provides a comprehensive tool kit to make creating your own local or state Good Neighbor Awards turn-key easy. The kit includes the entry form, judging criteria, judging score sheets, and publicity ideas to help you find and recognize REALTORS® who are making a difference, without draining staff time or association funds.

In fact, this spring, NAR will announce

how associations can apply for funding to pay for the grants.

The benefits to your association for spotlighting a Good Neighbor are many, not least of which is that you get to share a little bit of the spotlight and promote REALTORS® as professionals who give back to the community. By seeking out members doing good work, you show that your association values their efforts in the community, even when it's not related to real estate.

Uncovering the Good Neighbors at your association is inspiring and encouraging to other members and can help you identify potential future leaders.

Plus, Good Neighbor stories create positive content that engages members on social media and generates compelling news to share with local media about how REALTORS® give back to the community.

If you are already recognizing members for their volunteer work in the community, thank you. Consider timing your program so that you can nominate your winners for NAR's Good Neighbor Awards each May.

If you don't already seek out the members who are making a difference, check out NAR's tool kit to see how easy it can be.

NAR's 2018 Good Neighbor Awards

At the national level, five Good Neighbor



Cover of REALTOR® Magazine featuring 2017 Good Neighbor Louise McLean, who founded a nonprofit to support homeless children in Florida.

Award winners each year receive a \$10,000 grant for their nonprofits, national publicity, and recognition during NAR's annual conference. The 2018 deadline is May 4.

How to Launch a Local Good Neighbor Awards Program

Go to nar.realtor/gna. Click on "For Media and AEs" for a full tool kit with everything you will need. Questions about how and why to start? Need a nomination form? Contact Good Neighbor Awards Manager Sara Geimer, sgeimer@realtors.org, 312-329-8296.

Local Good Neighbor–Style Program Examples

The Minneapolis Area Association of REALTORS® shines a light on a few of its members who have dedicated their time, talents, and energy to serve in a volunteer leadership capacity in the community through its REALTOR® Heart of the Community Awards. The Orlando Regional REALTOR® Association, the Pinellas REALTOR® Organization, the Portland Metropolitan Association of REALTORS®, and the New Jersey REALTORS® each have their own local Good Neighbor Awards (and there are many more).



Congratulations New RCEs

These 29 REALTOR® AEs earned their REALTOR® association Certified Executive designation after an extensive course of study and exam. RCE is the only designation created specifically for REALTOR® association executives. It exemplifies goal-oriented AEs with drive, experience, and commitment to professional growth. Visit nar.realtor/rce.



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Greater Providence Association of REALTORS®, R.I.



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Maria Brogan, RCE,
The Northeast Association of REALTORS®, Mass.



Debra Brynoff, RCE,
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Kristyne Shelton, RCE,
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Royal Palm Coast REALTORS® Association, Fla.



Richard Throop, RCE,
Corpus Christi Association of REALTORS®, Texas



Vani Ungapen, RCE,
National Association of REALTORS®, Ill.



Combat Real Estate Cyberthreats

Technology that protects members from wire fraud, cybersecurity breaches.

Wire fraud and cybersecurity breaches remain valid threats in the real estate industry, despite precautions such as using password-protected Wi-Fi. In fact, wire fraud was the number one type of fraud in 2016, causing \$50 billion in losses, according to PointPredictive's Chief Fraud Strategist Frank McKenna.

Cybersecurity breaches result in major losses, as well. But although some cybersecurity breaches can be traced back to the culprit, most wire fraud crimes are untraceable. It happens in real estate transactions when hackers break into a real estate professional's or a client's email account and look for upcoming dates of transactions, especially closings. The criminal emails the buyer, posing as the agent or title officer with wiring instruction changes at the eleventh hour. If the buyer complies and sends the money to the fraudulent account, the money is gone—just like that. Unfortunately, the offer for the house usually falls through as well.

Taking wire instructions by phone or in person is safest, but encourage your members to follow these tips to prevent being a victim of fraud or identity theft when doing business online:

- Be suspicious of links and attachments from unknown email addresses.
- Do not use public Wi-Fi to conduct any transactions or business.
- Verify wire instructions received via email with a phone call to the right party.
- Use secure applications to collaborate online.
- Sign documents online using digital signature, two-step verification software.
- Use strong passwords, safeguard

passwords, and do not use the same password for multiple accounts.

Software designed for security and authenticity can help keep you and your clients safe from hackers and thieves when collaborating electronically on a sale. zipCommunity, by zipLogix, enables agents, clients, escrow officers, and others in the transaction to communicate in real time through video, audio, or text chat, and even screen sharing. Users can complete a transaction entirely online in a secure digital environment. All changes to documents are tracked in a history section embedded within the transaction, creating a paper trail of every edit and document view of the transaction. Both the agent and client receive a notification any time a change is made by either party.

When time or distance constraints don't allow parties to meet in person to sign documents, digital signatures prevail over electronic signatures. What is the difference between digital and electronic signatures? Any signature in electronic form, such as one written on a tablet with a stylus, constitutes an electronic signature, but these are susceptible to tampering or altering, which diminishes legal protection. A digital signature, on the other hand, is embedded in the document, securing the identity of each signer as well as the document's content.

Digital signing software such as zipLogix Digital Ink* ensures that the digital signatures on documents are legal and valid, long term, by taking things one step further in the transaction process. Documents signed using zipLogix Digital Ink are time-stamped, and the signature is permanently attached to the document. Any attempt to change the

data or tamper with the digital signatures will automatically and visibly invalidate the document. For an extra layer of security, optional SMS authentication is available.* It works by requiring the signer to enter a unique security code, sent by text message to the signer's mobile device, before documents can be signed.

Another way to keep accounts and client information safe is to take advantage of two-factor authentication software, such as Two-Factor Authentication from zipLogix. This is a free opt-in feature within the zipForm Plus platform that protects accounts and confidential client information from unauthorized access. Before users gain access to their accounts, they must enter a code sent to their mobile devices or email, verifying their identity at login.

Cyberthreats and wire fraud will persist as long as real estate professionals continue performing transactions online, but it's not necessary to resort to the old-fashioned way of doing business just to stay secure. Improvements in protection mechanisms against these crimes are staying one step ahead, continually outsmarting and preventing criminals from getting access to confidential information.

To learn more about protecting online real estate transactions, visit www.ziplogix.com or contact a zipLogix representative at (866) 627-4729.



Lisa Mihelcich is the COO of zipLogix and a licensed real estate agent. Contact her at 866-693-6767 or lmihelcich@ziplogix.com.

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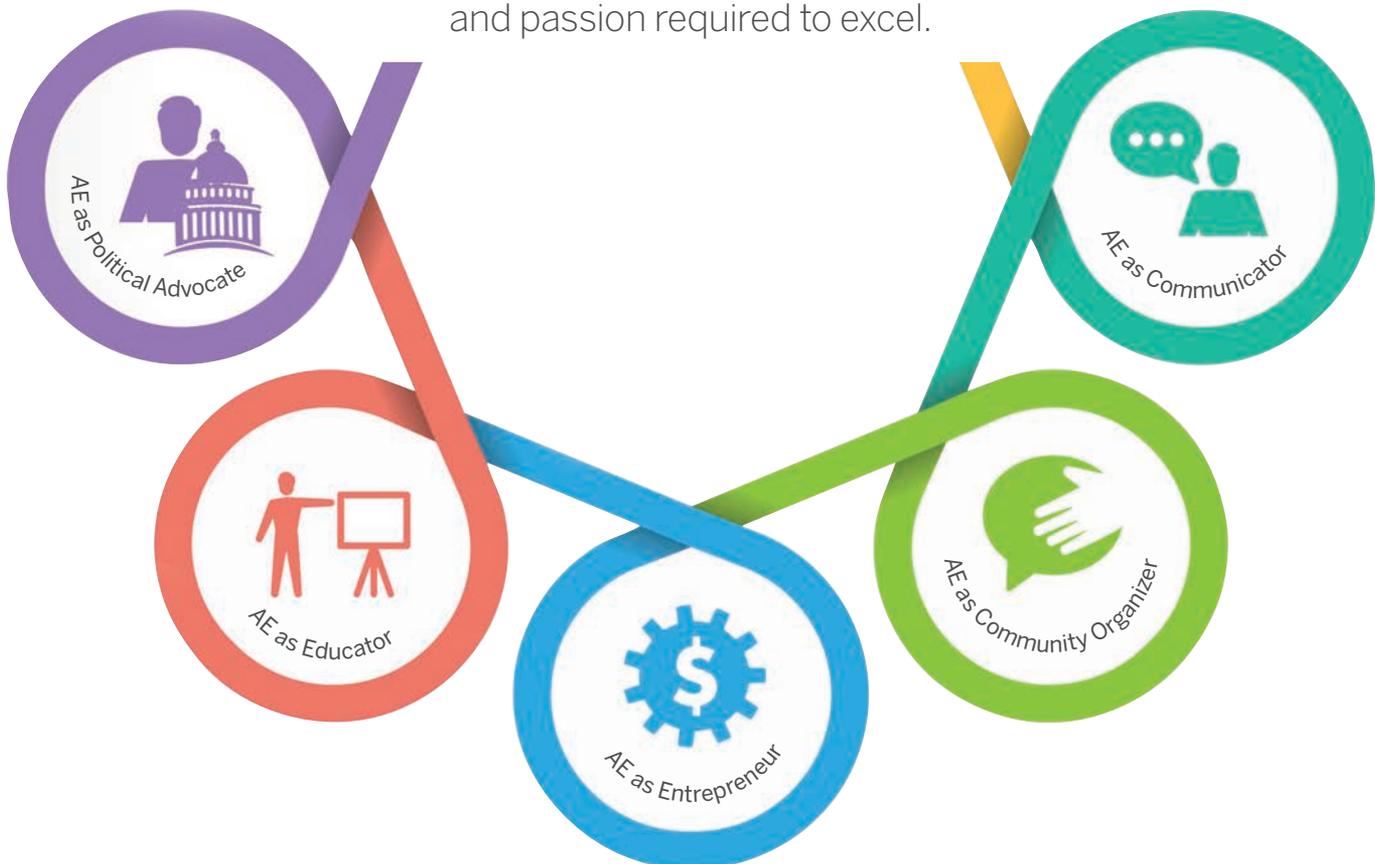
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*Must be a member of the National Association of REALTORS® **Where available. Some fees, set by the State/Local association, may apply.

Call (866) 627-4729 and speak with a zipLogix™ association account representative today.

The Many Roles of Today's REALTOR® AE

Association executives wear many hats. The job requires it. Yet, no one executive can excel at everything. Some have a knack for delivering services through technology, while others use their people skills to focus on member service. Here we look at five core parts of the job through five AEs who exemplify the skills and passion required to excel.



AE as Political Advocate

How to be a champion of REALTOR® legislative issues.

By Diane Moehlenbrink, CAE, RCE,
Communications Director, REALTORS®
Association of New Mexico.

“Public policy and politics are my passion,” says Steve Anaya, CEO of the REALTORS® Association of New Mexico. You could say it’s in his blood. The nephew of a former governor of New Mexico, Anaya has an impressive history of public service that includes directing the state’s Fannie Mae office, running the state’s office of the U.S. Department of Agriculture Rural Development, and currently serving on the city council of Moriarty, N.M., his hometown.

For the past 25 years, Anaya has been involved in the housing community and real estate industry and on countless boards, commissions, and foundations. “You can’t go anywhere in the state without someone recognizing Steve,” an association past president said. Anaya is an expert at leveraging his connections to further the REALTOR® legislative agenda and has cultivated relationships with elected officials and regulators throughout the state. He routinely brings together varied organizations to help meet common goals. In fact, relationships are the tool he uses to bring housing issues to the forefront of local and state politics.

For example, last summer the association joined 20 organizations in the Albuquerque Coalition for a Healthy Economy. All supported a healthy workforce and a healthy business environment but agreed that a proposed Albuquerque “sick leave” ordinance was not the answer. The law would have forced small businesses to give every employee 40 hours of earned sick time per year. Although an initial poll showed more than half of voters were in favor of the ordinance as written, after an extensive advertising campaign (funded in part by the

association’s Issues Advocacy Fund) voters began to understand the ramifications of the proposed ordinance, which was projected to result in a decrease in jobs. The ordinance was narrowly defeated in the Oct. 3 election.

During the legislative session, Anaya is usually found at the Roundhouse (New Mexico’s Capitol building) making sure elected officials know the REALTORS® association views on proposed legislation. He testifies before committees when needed, but the personal touch is what has helped make his association the industry group legislators call on for information about real estate issues under consideration.

“You gain a lot of respect when you present both sides of an issue and are able to communicate clearly why the REALTOR® view makes the most sense for the real estate industry and the public.”

— Steve Anaya, CEO, REALTORS®
Association of New Mexico

“Becoming an effective political advocate takes time,” says Anaya. “It starts small by making contacts, learning to love the process, and recruiting and educating your volunteers to be issue champions.”

Anaya works across party lines to position REALTORS® as a voice for all consumers, not just Republican or Democratic consumers.



To earn the ear of both parties, “you need to know the issues inside and out and be able to communicate both the pros and cons to decision-makers,” says Anaya. “You gain a lot of respect when you present both sides of an issue and are able to communicate clearly why the REALTOR® view makes the most sense for the real estate industry and the public.”

Anaya says the keys to boosting your advocacy presence is to “know your issues, educate the membership, and collaborate with other real estate housing partners.”

Another success story is the REALTORS® Association of New Mexico’s State Political Coordinators Program, modeled after a similar NAR program. The goal was to have a coordinator for each of the 112 New Mexico senators and representatives to help give the association even more voices in the legislature. “It wasn’t a success overnight,” says Anaya, “but it’s beginning to pay off in the association’s outreach efforts.”

Passion, relationships, and knowledge are the foundation that makes Anaya an effective advocate for REALTORS® in New Mexico.

AE as Educator

How to attract students and generate revenue with current, creative, and essential education.

By Carolyn Schwaar

Jim Haisler's favorite course to teach at the Heartland REALTOR® Organization in Illinois is called "Business Builder," and it's offered eight times a year. "The course is aimed at giving new members just getting into real estate the advice I wish someone had given me when I first started out," he says.

As a former real estate salesperson, Haisler—Heartland's CEO since 2006—has a keen understanding for what his members need to know, and he has a passion for delivering it. "I love talking with the new members, and teaching helps me better understand the material and the issues my members face," he says.

Heartland has a robust and popular education program despite having just 1,000 members. It also has a lot of competition from larger associations, real estate schools, and brokerages.



Although Heartland's classes are not always the cheapest, Haisler prides himself on delivering value. "We give you great customer service, and you're going to like what you get from us because we keep the program fresh and offer more than just the core CE and typical electives," he says.

Heartland is kicking off its popular Success Series this year with a panel featuring four of the area's most successful agents talking about what works for them.

In fact, the biggest step any association can take to grow its education program is to make the topics current, says Haisler. "If you have a great program, people are going to want to come and they're going to want to pay for it. But if you throw garbage out there, they're not going to come back. You only get one, maybe two chances to show a member that you offer quality education that will help them grow their business."

If you have members who aren't used to paying much—or anything—for education, put together a great program and look for a sponsor to offset some of the costs, Haisler recommends. "Offer outstanding quality at a reduced price, but don't give it away for free. We found that having a fee on a class gives the perception that there's more value."

Heartland also partners with neighboring associations to host designation classes, such as CIPS or GREEN. "Shared services is one thing any association, especially small ones, can do to put on these programs. That's one of the best things we can do for members to get designations."

In addition to current topics and designations, Heartland recently has added more night and weekend courses, including new-member orientation evening classes. CE classes and MLS training at night and Saturdays help those members who may have other day jobs, says Haisler. "For some members, Saturday is the only way they can fit CE into their schedule, even though it means some odd hours for us."

Haisler has shaped and adjusted his education program over the years to meet mem-



ber needs. For example, CE classes need to cost about \$35, be three to four hours long, and be concise. Elective courses should be less than two hours because members want to get their information and get back to business, he says.

"I love talking with the new members, and teaching helps me better understand the material and the issues my members face."

—Jim Haisler, Heartland REALTOR® Organization

Education is a profit center for the Heartland REALTOR® Organization because of popular topics and savvy cost management. "Save money by teaching courses yourself if you can, and get your CE instructor's license if possible. Share services with other associations, get sponsors, get grants from NAR or your state associations, and always charge a fee," says Haisler. Low-cost marketing is achieved via the association's Facebook page, website, and email.

Fortunately for the Heartland REALTOR® Organization, Haisler practices what he preaches about education. He holds six real estate designations (RCE, MRE, CIPS, AHWD, BPOR, e-PRO) and has a master's in real estate from REALTOR® University and puts his knowledge to work leading, teaching, and innovating.

AE as Entrepreneur

How to be an innovative and agile small-business leader.

By Sabrina Blair, Director of Communications, Orange County Association of REALTORS®.

With the long-standing history of REALTOR® associations, it can be tempting to take the easy route and keep doing things as they always have been done. But easy is not always effective. Dave Stefanides, CEO and AE of Orange County Association of REALTORS®, knows this all too well.

In his four years as leader of the Southern California-based association, Dave has helped Orange County REALTORS® become the largest in the state and ninth largest in the country. “Our membership has grown not only along with the county’s population but also because of our extensive educational offerings and benefits,” says Stefanides. “We truly do have something for everyone.”

When asked about running the association like a small business, Stefanides says, “Nonprofit is our tax status; it is not our business plan.” Although the economy is strong at the moment, he realizes the cyclical nature of real estate and is hedging against the next downturn. “Diversifying our income is essential to keeping membership dues low while also offering attractive, high-quality services to our members.”

With disrupters at every turn, the future of REALTOR® associations is uncertain, Stefanides says. Staff members at the Orange County REALTORS® are constantly made aware of this and are encouraged to be innovative in their quests for alternative sources of revenue.

“We have partnered with expert trainers to provide complimentary training to our members while also engaging in revenue-sharing for more advanced programs,” says Stefanides. The strategy is to attract mem-

bers to the program to experience it’s quality and convenience for free, then introduce them to the paid classes.

In addition to an already robust education program, the association created a leadership academy in 2016 that covers everything from parliamentary rules to personal branding and is in high demand among other associations.

They have also partnered with local businesses such as restaurants, mechanics, and dry cleaners to offer discounts to their 15,000 members as a part of their Shop Local program. The program started as a grassroots campaign of door-knocking and calling neighboring businesses to see if they would like to participate. “There has been a lot of interest from the community and local organizations to participate in this program,” Stefanides says—so much interest that many businesses are now seeing the benefit of the real estate community and are joining as affiliate members. Stefanides’ team is working to expand the Shop Local program into a printed savings guide that will be distributed to thousands of REALTORS® this year.

Leading the association’s list of non-dues revenue generators are its two REALTOR®

“Diversifying our income is essential to keeping membership dues low while also offering high-quality services to our members.”

—Dave Stefanides, CEO and AE, Orange County Association of REALTORS®



stores that offer a wide array of signs, supplies, and REALTOR®-branded merchandise. “We are in the process of adding new merchandise and moving our store online to better fit the needs of our busy members,” says Stefanides.

As the Orange County Association of REALTORS® continues to challenge the status quo, they hope that other associations will follow suit. “As a large association, we are lucky to have the means to invest in benefits for our members, but many require very little or no investment,” says Stefanides. “I encourage other associations to think outside of the box and create strategic partnerships with local trainers, leaders, and community organizations. You might be surprised with what can come out of a mutually beneficial relationship.”

AE as Community Organizer

How to create an environment of housing equality and opportunity.

By Kelsey R. Croston, Director of Brand Experience, Richmond Association of REALTORS®.

Ensuring that Richmond, Virginia's REALTORS® have the education, tools, and support they need to serve the area's homebuyers and homesellers isn't enough to ensure a vibrant housing marketplace and thriving community, according to Laura Lafayette, CEO of the Richmond Association of REALTORS® and the Central Virginia Regional MLS. There's another side: ensuring that all residents have access to affordable and safe housing.

Under Lafayette's direction, the Partnership for Housing Affordability's most recognized efforts include the creation of a regional housing plan in coordination with another non-profit and, most recently, the incubation of the Maggie Walker Community Land Trust, a locally focused program to provide affordable homes to low-income residents.

"The goal of the land trust is to preserve a mixture of incomes in a housing market that's rapidly seeing a loss of affordability," Lafayette said in a RichmondMag blog article that featured her as one of the area's top "change makers." "One of the ways to build wealth is through homeownership, but you have to be able to afford that step."

Lafayette's community involvement doesn't stop with just one housing organization. She also serves as a gubernatorial appointee to the Virginia Housing Commission and is the vice chair of the statewide nonprofit Housing Virginia. Lafayette also is the chair of the Board of Homeward and serves as the immediate past chair of the board of the Better Housing Coalition.

Lafayette's dedication to community advancement is unquestioned and her list of contacts in government, business, and nonprofits is long. Her core driver is to create a community of opportunity, and she never turns down a platform to talk about her passion. In a *Richmond Times-Dispatch* article highlighting her contributions to the community, Lafayette said of her housing work, "We're not looking at what the city will look like in 2017, but what it will look like in 2030."

Lafayette brings her passion for community work to the REALTOR® organization and makes it one of the association's goals by involving every member. REALTORS® are introduced to the issue of housing opportu-

nity through new-member orientation, and they are reminded at every event thereafter. REALTORS® realize that her effort to expand opportunities in the community is also a benefit to their business. "People don't buy a home until they've first bought into a community's quality of life," she says.

"People don't buy a home until they've first bought into a community's quality of life."

—Laura Lafayette, CEO, Richmond Association of REALTORS®

In 2016, the Richmond Association of REALTORS® launched its Quality of Life investment strategy, a model for bringing together impact investing and philanthropy to tackle affordable housing and education issues in the region. This strategy has been recognized as groundbreaking, and Lafayette hopes it will clear the way for other organizations to do the same.

For other associations looking to become community leaders in affordable housing, Lafayette says to align your organization's goals with your core values and start conversations about how you can have an effect in your own backyard. She suggests starting by teaching your membership to appreciate the extent to which they can impact their community.



"Although there are many factors that contribute to an area's quality of life, the condition of the homes we live in and the neighborhoods that surround them convey a compelling message about a region's values and priorities," says Lafayette. And to help ensure the quality of life in her area, Lafayette serves as the executive director of the Partnership for Housing Affordability, a nonprofit dedicated to ensuring that an adequate and diverse supply of affordable housing is a public policy priority in central Virginia. The organization also hosts several volunteer projects throughout the area in collaboration with 17 other local nonprofits.



AE as Communicator

How to establish trust among members and the media.

By Carolyn Schwaar

Perhaps Ryan Conrad is an effective communicator because of his years working in government and as a REALTOR® association government affairs director. Perhaps it's because of his early embrace of social media and online video. But however he attained and honed his skills, he makes the most of them to keep members of the Northern Virginia Association of REALTORS® informed.

"After years of lobbying, where I learned how to clearly and quickly communicate often complex messages to elected officials, I learned a lot about what works and what doesn't when

it comes to communication," says Conrad.

First, he says, always know what you're talking about. Take the time to learn from different perspectives what you're trying to communicate, he says. Yet stay within your area of expertise, he cautions, and rely on your leadership, staff, and outside sources for expertise you may not have.

Conrad's second tip is to know your audience. "How you communicate a message to your staff is going to be very different from how you communicate that message to members or the media or your leadership," he says.

Lastly, always have a goal in mind with your communications, he says. "Understand what you're trying to accomplish before you develop your communications strategy. What is the outcome that you're expecting? Are you trying to educate, inform, advocate, ask for something, clarify something? Have a goal and think about how you can get to

that goal through your communications and messaging."

When Conrad was with the Greater Lehigh Valley REALTORS® in Pennsylvania as it was attempting to merge with two other associations, the end game of his communications was clear: Persuade members to accept and vote for the merger. However, "communicating through that process was challenging," Conrad says. "We had to have

a communications strategy in place that was simple and could clarify the benefits of the merger. We had to anticipate members' concerns and what detractors might say, and be

ready with responses."

Conrad's merger communication plan also enlisted and empowered volunteer leaders with appropriate talking points and communication platforms to get the message out. The three associations launched a private Facebook group where members could air grievances and get answers from staff and volunteer leaders who were prepared to respond. Social media communication turned out to be one of the key elements in the merger's success.

In fact, today, Northern Virginia's entire communication strategy is based on a digital-first model. "Our approach is from



"Focus mainly on social media and video. These are the two most significant and easiest ways to get your message to members."

—Ryan Conrad, CEO, Northern Virginia Association of REALTORS®

the mindset of being online, whether it's our website, our social media, or through video," says Conrad. In the last year, the association created and filled two new positions—a digital marketing specialist and a digital and editorial content specialist. These two individuals work with the multimedia specialists under the digital engagement manager.

"We're very fortunate to have a strong and capable communications team, but not every association has that," says Conrad. "Many associations rely on volunteer leaders or outsource their communications to professionals, or [the AEs] have to do it themselves."

To smaller and single-staff associations, Conrad offers this advice: "Focus mainly on social media and video. These are the two most significant and easiest ways to get your message to members." These are also low-cost solutions, he says, because social media is free and AEs need only a mobile phone to make effective videos.

For associations large or small, there are the same three essential elements of effective communication, says Conrad. "First, strive for clarity and simplicity. Second, have a purpose, and third, listen to how your audience is reacting to what you're saying."

Take a tour of Northern Virginia's communications through its streamlined website, Facebook pages, Twitter and Instagram accounts, and YouTube channel.

My Job as an AE, 30 Years Later

The more things change, the more they stay the same for association executives.

As the real estate industry has changed in the last 30 years, so has the role that REALTOR® association executives play. There are new expectations, new skills required, and new challenges. And yet, some decades-old hurdles remain.

For an informed perspective on how your job has changed over the years and what might be next, RAE turned to Cindy Butts, RCE, CAE, CEO of the Connecticut Association of REALTORS® and a 30-year veteran of national, state, and local associations and MLSs. Butts, a William R. Magle Award winner, has chaired the AE Committee, served on countless workgroups and committees, and also often teaches the AE Institute boot camp course for new AEs.

Here are her perspectives on what has and what hasn't changed for AEs.

The angst over dues increases hasn't changed.

Why is a \$5 to \$25 dues increase, even if it happens 10 years after the last one, still seen as a sign of fiscal irresponsibility, a lack of sympathy for members' financial situation, or the one thing that will drive the entire membership to another association? Somehow there's still the notion that dues are supposed to never increase while every other cost increases. AEs are expected to deliver simultaneously innovative and preferably free services by a top-notch staff year after year. When there is an increase, we feel so guilty about it that a lengthy apology letter is sent explaining it. This angst is the single biggest factor that can lead to understaffed associations, salary stagnation, and even limit essential benefits, such as health insurance.

Members still want professionalism, and yet they still don't want to file Code of Ethics complaints.

Despite all the training and services to increase professionalism, members' failure to police their fellow members' conduct is

still at the heart of the issue. NAR has taken many steps to try to make it faster and easier to file or get resolution to Code of Ethics complaints, yet the bulk of members still won't file them.

Many still hate change even though there's so much more of it.

The one thing I don't need to explain to any AE is members' fear of doing anything differently than they have done for years. Little changes that would otherwise seem insignificant at other businesses can be big obstacles at REALTOR® associations. The change-haters are not just our members or leadership, but can also, unfortunately, be our own association staff.

Our professionalism and status have grown.

Thirty years ago, many AEs had the title "executive secretary" because their roles were largely administrative. Like our members, most AEs have had other careers before this one. There are a lot of former teachers and military, and those wanting just a part-time job coming from virtually any industry. But in



Cindy Butts, RCE, CAE, CEO of the Connecticut Association of REALTORS®

the past 10 years there are more association CEOs with advanced degrees and business, legal, or government affairs backgrounds. We've needed this change because our industry is far more litigious and more extensively engaged in advocacy. A decades-old treatise called "The Role of the Executive Officer" ends with: "You need to steer the ship but don't get caught with your hand on the tiller." I believe the role of association CEOs has changed, in many cases, into true partnerships with our officers, in which we are part of the team and trusted to openly have our hand on the tiller. Forward-looking AEs cannot underestimate the value of professional development to strengthen this partnership.

Our practical skill set has changed.

Do you remember carbon paper, typewriters with correction tapes, paper maps, MLS books, and index cards with member payment history? I do. Although AEs have always been expected to have dozens of diverse skills, we've changed from being high on administrative skills and interpersonal relationships—because so much work was

“There is far more camaraderie and partnerships happening among AEs than a decade ago, which is a great thing. The most valuable resource is your REALTOR® association community—for support, education, and even lifelong friendships.”



done in person and on the phone—to high on every type of technology, communication, management, marketing, and leadership skill. We must keep up not only with the pace of innovation needed to run effective associations, but also with innovation in the real estate industry to provide members with the services and programs they need to grow their businesses.

Everyone doesn't run an MLS anymore.

There has been a lot of regionalism of MLSs over the decades and there will continue to be more. Our associations are inventing their own value propositions to replace reliance on the MLS. Whether it's education, business tools and services, data, technology, or information, associations without MLSs are redefining their relevance.

Our work and personal life has become more intertwined.

Before the internet, working late meant being physically at the office to do it. Before cell phones, no one in leadership would call you at home unless it was an emergency.

Now we can work and be found anywhere, which is both great and terrible. Our members befriend us on social media and engage in more than our work life. Love it or hate it, this social connection enables us to more effectively reach and serve members and become part of their everyday conversations, which ultimately boosts our relevance in their lives.

We still lobby for many of the same issues.

Political and legislative advocacy is more a part of our job today because real estate is faced with more constant threats at the state, local, and federal level. Thirty years later we're still fighting against transfer taxes, working to champion private property rights, and preserve the independent contractor status. Hundreds of thousands of REALTORS® can now instantly and simultaneously voice their opinions instantly and electronically on legislation and it make a significant impact.

Competition and cooperation among AEs has shifted.

Back when local board membership was based solely on office location, AEs shared everything with each other. Then in 1994, when Board of Choice came around, we put up walls and started to compete fiercely for each other's members. Now we've come nearly full circle, realizing that we must work together to prevail over the tremendous outside forces impacting the industry. There is far more camaraderie and partnership happening among AEs than a decade ago, which is a great thing. The most valuable resource is your REALTOR® association community—for support, education, and even lifelong friendships. Today, you can reach out not only at the AE Institute, but also through the Facebook group ([facebook.com/groups/AEYearRound](https://www.facebook.com/groups/AEYearRound)), where more than 700 REALTOR® association professionals share ideas and ask for guidance. Many NAR staff have been around 30-plus years as well. The term “REALTOR® family” is real, and that's something that will never change.

One final thought

Thirty plus years later, it's still a great gig, with huge opportunities to make a difference.

need to know: core standards

Community Outreach Creates Positive Impact

REALTOR® association takes on a divisive issue at a public event .



Searching for a bold way to fulfill the Core Standards community outreach requirement, the 2,400-member Cape Fear REALTORS®, N.C., created an initiative to strengthen community bonds by providing public education on important local issues.

The first event in the association's Public Square initiative set out to address the contentious issue of offshore oil drilling and featured speakers from each side of the debate. The goal was to provide the community with a forum for conversation while modeling civility, specifically for students.

The forum, planned for Oct. 17, 2017, featured international experts Jean-Michel Cousteau, oceanographer and environmentalist, and John Hofmeister, former president of Shell Oil Co. Together, they would discuss the issue "To Drill or Not to Drill?" for oil off the coast of North Carolina. Although this is a touchy issue in the media, a Cape Fear

REALTORS® survey showed 40 percent of its members had not formed an opinion on the issue and neither had the association.

"Going in, we knew there were groups strongly opposed and others strongly supporting this issue," says REALTOR® and civic adviser Tom Gale, one of the forum's originators. "It was difficult to get a balanced view of the pros and cons, so we selected it as the topic to educate on both sides of the issue. REALTORS® often act as the information gateway for people coming to the Cape Fear region; thus, it is important for them to be informed on critical issues like offshore drilling."

Three weeks before the event, the association had sold only 35 tickets for a venue that holds 1,557 attendees. The association and its cohosts had invested tens of thousands of dollars for the speakers, venue, security, marketing, ticketing, and related expenses. Two weeks out, ticket sales in-

creased to an encouraging 244. A week out, the number swelled to 723. One day away, ticket sales soared to 1,259 and on event day, it sold out.

The timely topic and well-known speakers proved to be an effective allure for residents. But in today's environment of hyperpartisan political debate and ugly liberal-conservative clashes on social media and television, how would Cape Fear REALTORS® pull off an event that had the potential to turn into a heated confrontation, or worse?

"We took great care to deliver a program that was educational. It was not a debate," says Cape Fear REALTORS® COO Shane Johnson. "We avoided things that might incite people."

The program began with a five-minute video on the importance of civility, with messages from Jose Sartarelli, chancellor of the University of North Carolina Wilmington; Amanda Lee, president of Cape Fear

Community College; and Wilmington Mayor Bill Saffo, a REALTOR®.

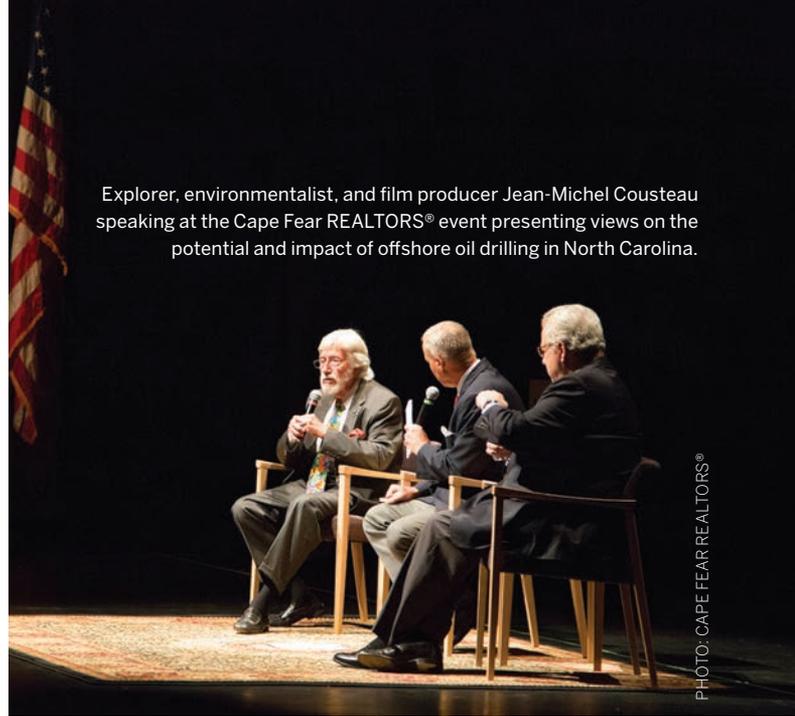
“The Public Square has grown from the need for more respect in the public arena,” said Saffo. “When present, respect allows us to understand our differences while we focus on commonalities.”

Next, the emcee, Jon Evans, a well-respected local TV anchor, took the stage and explained the importance of being respectful. He stood at the edge of the stage, looked out at the audience and said, “This isn’t Facebook!” Two police officers were posted on the main floor of the auditorium as visual deterrents.

“We also took great care in inviting everyone,” says Johnson. “In fact, we handed out tickets to the 50 protesters outside the venue, inviting them in to participate, respectfully—and they did! We did not have a single outburst or incident.”

The event stands as the largest in the association’s 95-year history, earning hours of media coverage and a social media “explosion,” says Johnson.

Yet the journey to this successful event was not easy, says Johnson. “It took several years to bring the program to fruition. We collaborated with influential community leaders, partnered with major media outlets, and connected with other organizations willing to promote the forum to their memberships.” In fact, both the local GOP and Democratic parties promoted the event to their memberships.



Explorer, environmentalist, and film producer Jean-Michel Cousteau speaking at the Cape Fear REALTORS® event presenting views on the potential and impact of offshore oil drilling in North Carolina.

PHOTO: CAPE FEAR REALTORS®

“Beyond all the other positives,” says Gale, “this event resulted in a substantial boost for the REALTOR® brand and image in the region, which is one of the end goals of Core Standards.”

To watch the Public Square promo and civility video, visit vimeo.com/250805218.



Build Better Communications, Practice Being Present

How you can recognize and cultivate intangible skills to be a better AE.



PHOTO: GETTY IMAGES

CEOs with presence have an attraction that entices others to engage them in conversation. They project an energy that indicates that they are aware of their surroundings and are open to participate.

The ability to effectively communicate and confidently present yourself are valuable skills in advancing your AE career. Whether the audience is the general public or your members and directors, achieving the proper impact through communications and presence positions you as a competent CEO.

This is the fourth in a series exploring intangible skills of great CEOs. The 10 intangible skills are actually five mirror-image pairs that are exhibited differently by two CEOs. In this column, I discuss the intangible skill pair of communication and presence.

What is the skill of communication?

CEOs with the skill of communication can deliver information, feelings, or thoughts effectively and forcefully to create a desired effect. They use writing, speaking, and visual images to advance the message.

Communication is a fundamental skill. No matter how talented the CEO may be in strategizing, managing, and innovative thought, the organization demands that plans and ideas are represented well to those who must be influenced. Since communication involves a variety of tools—writing, speaking, influencing—the successful CEO must process all these capabilities.

A good communicator's tool belt

CEOs serious about the trajectory of their careers focus on speaking effectively in any setting. They know good speakers are perceived to be top CEOs because they project a strong personality, present effective positions, and outline a course of action.

From a personal and association standpoint, the tools for communicating are almost unlimited. Today we can communicate with anyone, anywhere, anytime, in

any format, in any language, on any device. Communication has become universal, instantaneous, inexpensive, easy, and expected. So why is it often an elusive skill?

Speaking, writing, and being good at both

Successful CEOs use communication first in two areas: speaking and writing. It is rarely equally balanced; some people excel at speaking and others do well with writing. Some CEOs tend to favor speaking or making presentations over writing, as writing seems to be more passive. However, written communication is a powerful complement to speaking. Regardless, CEOs who successfully communicate devote considerable energy to both.

All communication will have more impact if linked to significant areas. Jerry Panz, CEO at Wilmington Regional Association of

REALTORS® in N.C., advises, “When communicating a direction of the association, it is essential to always keep a strategic connection.” Discuss everyday activities in terms of strategic objectives. He calls it “strategic linked tactics” and it elevates even the most mundane topics to higher levels.

Essentials of transparency

Transparency, which we can also call being honest, open, and direct, is a driving force for CEO communications. To be effective, the “transparency mandate” must permeate the entire organization. This means detailed information is freely available through communications platforms—email, newsletters, website, handouts, videos, podcasts, etc. Great CEOs are clear in the necessity of linking transparency to all communications. To them, communication without transparency is misleading.

The early challenge for new CEOs is to understand this relationship and reject any effort to manipulate the information or mislead, either consciously or unconsciously. With the growing distrust of institutional communications, especially the media, the opportunity to impress is available for the transparent association.

What is presence?

Presence is the ability to draw others to you; it is charisma. Virtually invisible, it is

powerfully effective. It is influence through quiet action.

CEOs with presence have an attraction that entices others to engage them in conversation. They project an energy that indicates that they are aware of their surroundings and are open to participate. A quiet confidence defines their demeanor.

I was facilitating the CEO recruiting for a large association, and one event was a social gathering to meet the top candidate. It was fascinating to watch the candidate work the crowd. He walked confidently, surveying the room with his head high. He moved easily from person to person engaging them in topics related directly to them.

The guests were drawn to him. One remarked, “There is just something—I don’t know how to explain it—special about him.” This is the most vivid example of presence I have experienced.

Defining presence: Being confident, sincere, and professional

Great CEOs with presence struggle to define it, but most say it is about being confident, poised, professional, and sincerely interested in the other person. This gave me two areas to pursue.

The first was the positive attitude toward others. Interest in someone else removes the possibility of arrogance. As Janet Kane, CEO of the SouthEast Valley Regional Asso-

ciation of REALTORS® in Arizona, explained, “For me, presence is all about how you make others feel. I try to make them feel warm and welcome, putting out a feeling of inclusivity.”

Practical advice from CEOs with presence includes doing your homework before any event and identifying the interests, hobbies, and business activities of everyone in attendance. Know what their children are doing in sports, schools, or other activities. Personal small talk has more influence than facts or your opinion.

Be aware of your body language

The second defining area of presence is physical presentation. Nonverbal signs influence us all. Stand tall—or sit up in your chair—and engage others with energy and interest. Good posture increases your confidence.

Be calm, even if the exchange is heated. This shows your strength and predictability. Continue to be in the moment, focused on the conversation and individuals. Looking at your phone or around the room breaks the connection and destroys the energy you want to create.

After Kane was hired as CEO, the association held an introductory reception of leaders. The president took her husband to the event and said, “Let me point out our new CEO.” He responded, “I already know who she is. Over there, correct? She has a calm and confident look—quite professional. She is the only CEO in the room.”

CEOs with presence enjoy a perception that allows them to operate successfully in all executive areas. It opens the door to effective presentations and communications, even before the first word is spoken.



Jerry Matthews’ executive career spans more than 20 years as a REALTOR® state association CEO and more than 12 years as an industry consultant. His consulting practice focuses on facilitating change for executives and organizations. JerryMatthews.com.

How to Acquire Intangible Skills

Set out to cultivate these intangible skills in the same way you’d learn a language or another hard skill, such as event planning or financials.

- Contact a successful CEO who has that skill and seek advice.
- Request a successful CEO to mentor or formally coach you.
- Search the business literature, carefully noting the corporate view bias.

- Search business videos; TED talks are particularly valuable.
- Attend AEI, ASAE, and other executive education events.
- Consider local university advanced management programs.
- At education events, focus on personal contacts with successful CEOs, not just course content.
- Join or create peer networks of like-minded executives.

Your Sexual Harassment Policy

What is the AE's legal role in preventing sexual harassment at the association?

It is virtually impossible, these days, to avoid stumbling across yet another breaking news story on sexual harassment. Victims of harassment are coming forward, and the accused are feeling the consequences. These high-profile stories of workplace harassment have association executives across the country grappling with how best to protect themselves, their staffs, and their members from harassment. The answer, in a nutshell, is policies and education, and now is the time for you to revisit both.

What is sexual harassment, legally?

First, it's important to understand that sexual harassment covers a broad range of behaviors that can include verbal and nonverbal conduct including sexual jokes, innuendos, or propositions, as well as leering and the display of sexually suggestive objects or pictures. It can be in person or over the internet, including social media or email. Moreover, sexual harassment can be intentional or unintentional and overt or subtle. And, while we often think of sexual harassment in the context of a man sexually harassing a woman, keep in mind that a woman can also be the harasser, and that it can occur between members of the same sex.

AEs have a responsibility to ensure an environment free of harassment. Your efforts to create and maintain a strong antiharassment program will not only help protect your association from legal liability but also help safeguard some of your most valuable assets—your employees, volunteers, and reputation. Failure to establish an antiharassment program and failure to take immediate and appropriate action in



AEs have a responsibility to ensure an environment free of harassment.

PHOTO: GETTY IMAGES

response to harassment you knew about or should have known about, on the other hand, could land the association in hot water. Your association could be named in a lawsuit between the accuser and the accused as complicit in the harassment.

Every REALTOR® association should have well-written antiharassment policies, including one for staff covering interactions between employees and between employees and members, and a second policy, or code of conduct, for the association's leaders. This code of conduct would apply to leaders carrying out the association's business, and should cover both interac-

tions between association leaders and interaction between those leaders and association employees. NAR recently updated its samples, guidance, and resources for associations on this topic. See sidebar.

Have a clear policy

Your antiharassment policy should include several key elements. First, the policy should have a clear definition of harassment. Next, the policy should contain a statement encouraging individuals to immediately report harassment and identify where incidents of harassment should be reported. Here, your policy should include multiple avenues for

In the event that you, the AE, are the victim of harassment by leadership or staff, your association's policy should include a provision that directs you to report the harassment to the highest-ranking elected officer not involved in the complaint, who then must follow the procedures in the policy to investigate, and if warranted, take appropriate action against the perpetrator.

reporting harassment. Human resources, an employee's supervisor, or even the association executive are all appropriate reporting avenues to consider including in a policy.

For instances when an association executive is the victim of harassment, it would be wise to include a provision that directs the AE to report the complaint to the highest-ranking elected officer not involved in the complaint. That official must then follow the procedures in the policy to investigate the complaint.

The policy should also clearly outline the steps the association will take to investigate a complaint and the potential consequences for individuals found to be in violation of the policy, such as, but not limited to, termination in the case of employees or removal from positions for elected leaders. And, remember, each complaint must be investigated promptly and thoroughly. If you do not have a qualified investigator on staff, consider involving legal counsel to assist you with the investigation and resolution of the complaint.

Finally, be sure that your policies include a "no-retaliation statement." This communicates that there will be no negative consequence for anyone who makes a good-faith report of harassment. This is an important element in creating an environment where victims feel comfortable speaking up and reporting inappropriate behavior without fear of negative consequences. This, in turn, helps place the association in a position to promptly address issues of harassment—all of which helps the association avoid liability down the road.

Antiharassment training and awareness

Once the policies are in place, your job is not over. Antiharassment training sessions for employees and association leaders are a critical part of an effective harassment prevention program.

Conduct training sessions for new employees as well as periodic retraining sessions throughout their employment. For association leaders, include antiharassment training as part of the association's leadership orientation program. Feel free to include NAR's video explaining the National Association of REALTORS® antiharassment policy posted at nar.realtor/national-leadership/board-of-directors/code-of-conduct-and-sexual-harassment.

You can even go one step further and require employees to sign an acknowledgement of their understanding of and compliance with the association's policy, and require association leaders to sign and agree to the association's policy, or code of conduct, as a requirement of their leadership position.

In the end, even the most well-written and well-intended policy will have little protective effect if the association does not adhere to it. To ensure that your association creates a zero-tolerance environment for harassment, you must not only implement policies but also follow them by promptly addressing each complaint in accordance with the policy.

Through your policies, educational efforts, and adherence to the policies, your association will go a long way toward meeting its responsibility to provide an environment free from harassment, and avoiding legal liability.

Harassment Policy Resources



Above: NAR's General Counsel, Katie Johnson provides an overview of the Association's Code of Conduct and firm policy against sexual harassment in a video. At nar.realtor, search "sexual harassment."

New Governance Guidance from NAR

"Good Sense Governance," a new monthly information and resource series at nar.realtor created by NAR's Legal Affairs and Association & MLS Governance teams, provides association governance best practices and resources aimed at helping associations implement sound governance practices, and tackle important governance issues. Each edition features NAR guidance, a printable fact sheet for distributing to leaders and volunteers, and links to state and local association resources. The February edition of Good Sense Governance features new resources on sexual harassment policy.



Lesley Walker is vice president, deputy general counsel at the National Association of REALTORS®. Contact her at 312-329-8834 or lwalker@realtors.org.

Class & Event Registration Software

With a few clicks, software makes class and event registration less of a chore.

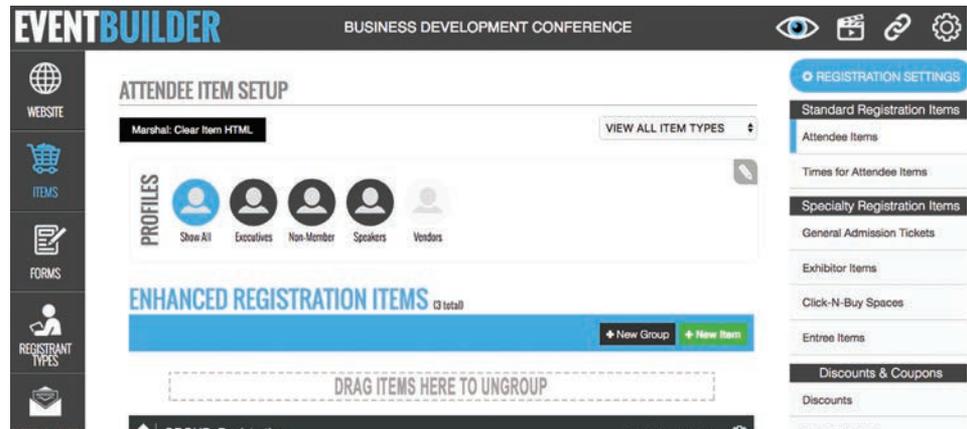
As associations ramp up their education and event offerings, keeping track of registrations and payments is a huge task. Automation is essential, but which piece of software or online app fits your needs and budget? REALTOR® AE took a look at some of the systems associations use and the features that save the most time and effort.

As you might expect, the universe of registration technology is vast and complex. Offerings range from simple online sign-up sheets to self-service portals that track members' education progress, process payments, and communicate with attendees. Technology focused on events differs slightly from that for classes, but associations often use one system for both needs.

Where to start

If you're hoping to move away from taking registrations over the phone or signing up event participants on-site and dealing with forms and cash, start with requiring preregistrations and payments online. Although members may balk at first and need time to adjust, the benefits in the long run are worth it. Members are more likely to attend events for which they've prepaid, and staff avoids the liability of handling cash.

A good starting place to transition your members to online event registration is to go where they already are, such as Facebook. Facebook offers a range of options for promoting your event but doesn't let people actually register there (unless you're using Eventbrite or a similar plugin—more on that later). You'll need to set up a link from your Facebook event page, which you can create under the event tab of your association's page, to another site, such as these free



Eventsquid's registration form building interface.

options below.

The free online app Doodle is as simple as it comes for sign-ups. You can list the event time, place, and a short description, and members type in their name to indicate their attendance. That's about all it does. Doodle is not practical for a convention, but if you're just looking to capture which directors are coming to the next meeting or how many volunteers are planning to help out at the next charity event, it saves you from taking phone calls and managing paper lists. Similar to Doodle are Evite and Wufoo, and even Google Forms will enable you to create an online form where the data is saved to a convenient spreadsheet.

Another free registration option with a few more bells and whistles is Event Smart. The basic version comes with a customizable URL that you can put in your social media and print marketing. It also enables you to set up an unlimited number of events, offer tickets, and collect and export all of your data to an Excel sheet or your membership management software. The free version even offers automatic email confirmations and password-protected, branded event pages.

Similar sites with a free version plus paid extras include CourseStorm, Guestlist, and Ticket Tailor.

Spend a little to save a lot ... of time

Once you're ready to start spending money on software for events and class registration, you want to get the most for every dollar. That means knowing what you need—and what you don't—from the technology.

Because only the paid options offer online payment ability, you'll want a system that takes credit cards, bank cards, and PayPal securely, quickly, and without charging exorbitant fees on each transaction. Some systems charge a flat \$1 for each ticket sold, some charge 2 to 3 percent per transaction, and others charge an annual fee for unlimited sales.

The more self-serve an app is, the more time it saves you. Ideally, members should be able to easily navigate the platform, view their own registration confirmations, and see all the classes and events offered plus the classes they've taken in the past.

Popular with REALTOR® associations is Eventbrite, a cloud-based event management and ticketing platform that enables

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Eventbrite partners with event app Attendify for mobile-friendly registration and event management

users to organize events and sell tickets online. The system integrates with Facebook, so attendees can buy tickets without ever leaving the site. Note, however, that your events have to be open to the public to sell tickets through Facebook. If your event is for members only, you can redirect attendees to complete their order on your Eventbrite listing page.

Lee Cooley, communications manager at the Arizona Association of REALTORS®, says he has looked into using Eventsquid, a solution with a funny name but a robust set of event tools, including many ideal for managing larger conferences. Eventsquid tools include an agenda-creation dashboard with built-in conflict resolution to keep you from double-booking rooms and speakers.

Kira McNeil, member communications and outreach coordinator at the Memphis Area Association of REALTORS®, has been experimenting with Picatic and says it's user-friendly and attractive. Picatic is free for free events, charges for paid events, and offers a simple, single-page checkout and tools to help you promote your event.

Member management integrated systems

Many membership management systems, including Rapattoni, MMSI, and RAMCO, have event registration systems and education tracking solutions or offer them as an option. Yet associations report using stand-alone solutions, such as those mentioned above, for better ease of use, especially when it comes to building custom registration forms and tracking



payments. Many of these systems are attractive and easier for members to navigate, AEs say.

"It seems as if the member databases used by most REALTOR® associations are missing the mark by not providing an event registration module that is clean and easy to use," says Melanie Green, communications director at the Northeast Florida Association of REALTORS®.

Member management systems have to perform a wide range of functions, so they often don't do one thing as well as a single dedicated solution can. However, to avoid tedious manual input of data from your event solution to your member management system, look for options that offer easy integrations or at least reporting in formats (like Excel) that you can then upload to other pieces of technology in your association arsenal.

As with any new technology you use or buy, ask your vendor about data security and who owns the data you or your members upload to the app. Read your contract carefully to uncover any hidden charges or automatic renewals.

— Carolyn Schwaar

Make it Easy for Members to Give you Money

Many associations are moving away from accepting cash at events (or keeping stashes of petty cash around at the office) for easier tracking of payments, convenience, and avoiding any situations in which it could go missing.

Most online event and class solutions offer credit card and bank card processing services, but innovative mobile credit card reader technology has made accepting payments on the go, at your association office, or at a live event easier, faster, and safer.

Danielle Boutin, vice president of communications and emerging technologies at the REALTORS® Association of the Palm Beaches, uses Intuit QuickBooks Payments coupled with a card reader device attached to a smartphone or tablet for on-site event payments. She pays an annual fee instead of a per-transaction

fee to swipe credit cards and scan computer-chipped bank cards.

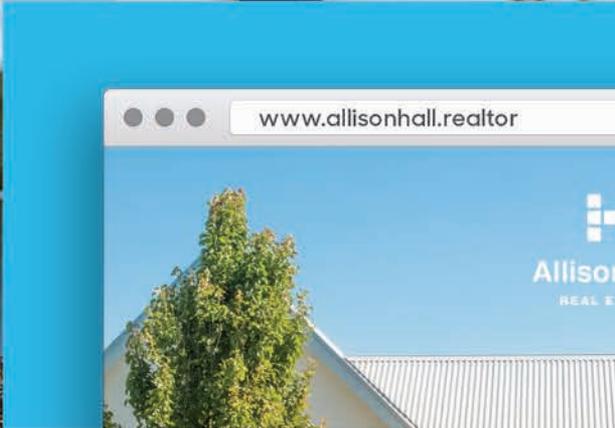
For about \$50 a month, Lydia Govoni Perham, AE at the 400-member Strafford County Board of REALTORS®, N.H., uses Square, a mobile app and device with integrated payment processing for a 2.75 percent fee.

"We use our Square through our iPad Mini," she says. "We have both the chip reader and the swipe unit, and it's easy to set up and link to our association checking account."

Kevin Juliano, digital director at the Pennsylvania Association of REALTORS®, uses Square to accept RPAC investments at events. "We've issued Square readers to specific staff members and state leaders who can assist in taking RPAC investments at events. We have them set up as staff so we can track who took which investment. They also have to go through an annual training to ensure they are following the rules," he says.



The Square credit card and bank card reader plugs into smartphones and tablets for on-site payments.



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A Leader With a Well-Rounded Approach

Deb Junkin on adapting to the multifaceted demands of being an AE.

As one of the most recent inductees to the Dr. Almon “Bud” Smith AE Leadership Society, Deb Junkin, RCE, CEO of the Georgia Association of REALTORS®, is recognized for her achievements on many fronts. In the area of association management, Junkin has honed her skill by earning the Strategies in Nonprofit Management certificate from the University of Chicago and is a graduate of Duke University’s Nonprofit Management program.



In community outreach, Junkin serves her area’s interests on the University of Georgia Housing and Demographic Research Center Advisory Board and the Georgia Healthy Homes Strategic Planning Advisory Committee. And for political advocacy, Junkin is a Platinum R RPAC Hall of Fame investor and a six-year member of NAR’s President’s Circle. She also serves on the National Association of REALTORS® Housing Opportunities Committee and AEC State EO Forum. Here, we ask Junkin for her perspectives on achieving success in today’s changing association environment.

Q. Do you believe AEs will need new skills to run the association of the future over the next five or 10 years? What skills?

There will be a greater demand for AEs to be leaders, not administrators. Studies have shown that the volunteer leaders of the future are looking for AEs who are visionaries, strategic thinkers, collaborators, unifiers, mentors, and problem solvers. Leaders want executives who understand not only association management but also the real estate industry. I often hear that the state or national conference doesn’t offer enough for AEs, but I don’t think that’s true. Attend a session or two for brokers and invest the time to understand their challenges so you can position yourself to help focus the association to identify solutions.

Q. As someone involved in housing opportunity at the national association and in your state, what challenges remain in achieving the goals of the Fair Housing Act (eliminating all discrimination in housing)?

If we asked our members which protected class represented nearly 60 percent of the 8,300 complaints of housing discrimination filed in 2016, they may be surprised to learn these were discrimination based on disability. The challenge continues to be awareness and understanding of the protected classes not only as recognized by the Fair Housing Act but also as recognized by the REALTOR® Code of Ethics.

Q. As a role model and mentor for your local association executives, what advice do you have for smaller association AEs who feel undervalued by their leadership?

The primary role of the elected leadership is to govern, and the role of the AE leader is to manage the association. Many smaller associations with a staff of one or two have

a greater challenge when it comes to separating the two because leadership is often called upon to be both volunteer leader and volunteer manager, depending on how the association is structured. To develop mutually respectful and beneficial working relationships, smaller associations should develop detailed staff job descriptions with a chief staff evaluation process adopted by the BOD as policy. Written volunteer position descriptions are also necessary because often, over time, volunteer positions assume authority that is not actually spelled out in the bylaws. Next, strive to be compensated fairly by presenting your leadership with salary facts from compensation studies, including from local outside organizations, such as the Chamber of Commerce or other not-for-profits, or online sources, including guidestar.org.

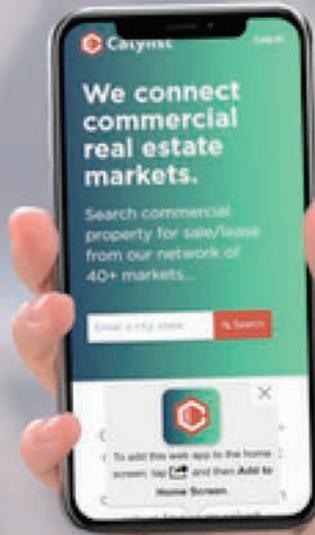
Become your own best advocate by tracking and sharing your achievements. Let’s face it, most of us are great at singing the praises of our leadership but we often fail to let them know what we have accomplished. Lastly, reach out to your peers for assistance with any of the above; they are your greatest resource.

Q. In today’s polarized political environment, has your approach to advocacy or communication regarding your association’s political actions changed?

Communication of our advocacy efforts has expanded to include legislative, regulatory, and bipartisan issues on the national, state, and local levels. For Georgia, our goal is to continue to embrace bipartisan advocacy to positively impact our associations, our membership, and our communities. With the adoption of Core Standards, advocacy has become an essential focus of our service to the local associations and membership.



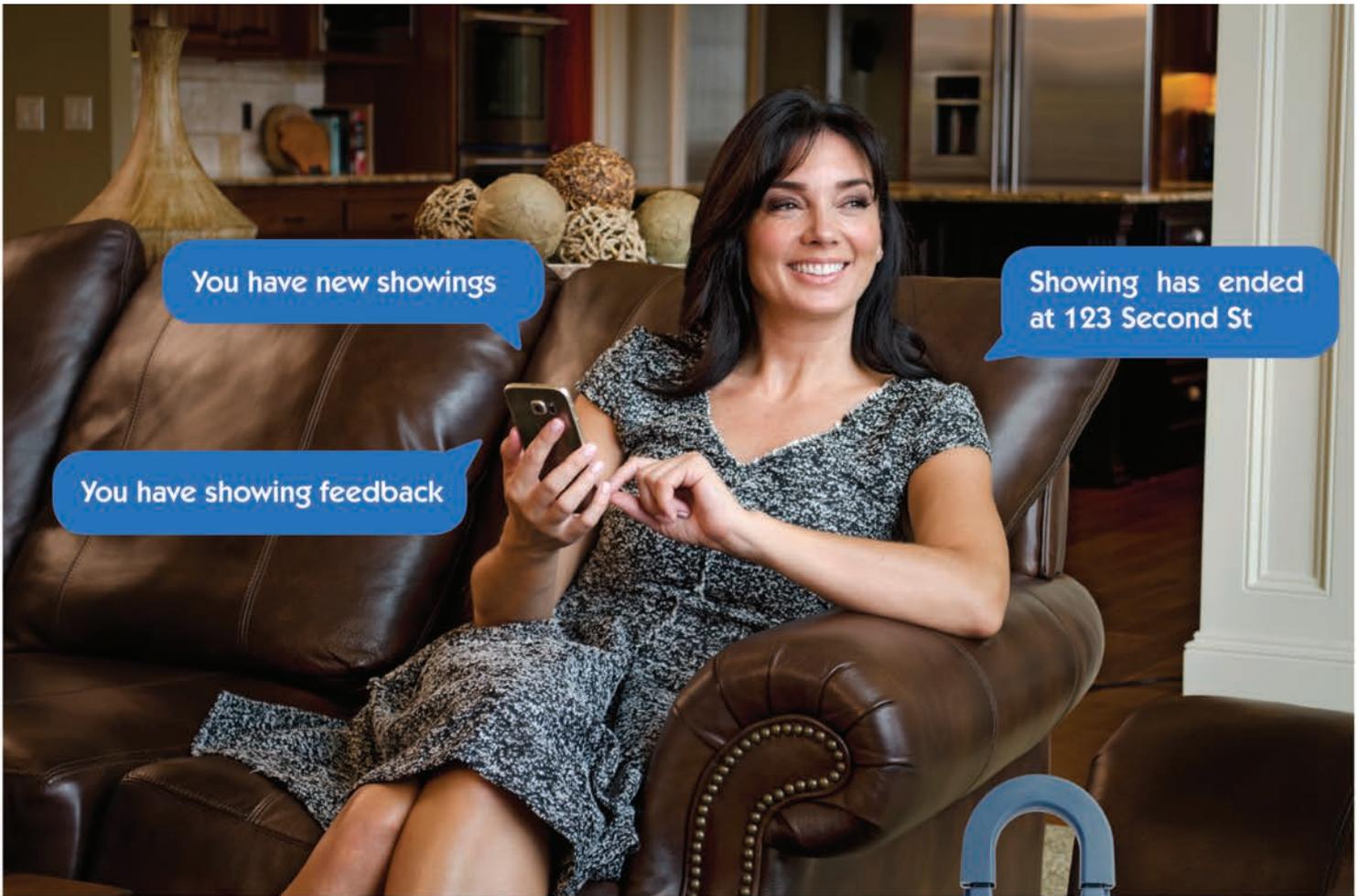
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