

REALTOR® AE

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Great Ideas

More than **100** program, product, and outreach ideas distilled from the past 6 years of REALTOR® AE magazine designed to inspire, guide, and motivate you to try something new.

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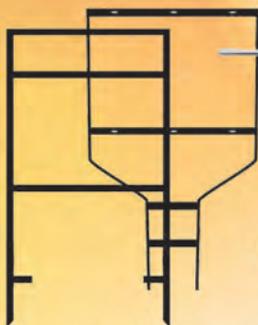
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REALTOR® AE Summer 2019

features

Great Ideas

More than **100** creative approaches to programs, events, outreach, advocacy, communications, and technology from past issues of REALTOR® AE magazine (plus some new ones) designed to inspire, guide, and motivate you to try something new. [Page 12](#)

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Keep Your Fundraising Legal

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Sharpen Your Governance IQ

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Help Leaders Stay in Their Own Lane

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to lead, not overrun,
your association.

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online

NAR.REALTOR/RAE

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and PDF format and
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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.

Never Underestimate Where Great Ideas Can Come From



Duncan MacKenzie, RCE,
Association Executives
Committee Chair,
CEO, New York State
Association of REALTORS®

One benefit of having three distinct layers of REALTOR® associations is the competition it creates and the innovation that results. If you weren't already aware, we have a lot of smart and creative colleagues. Working with my AEs from across the nation, I am always learning about new programs and practices that can help increase the value of membership in my state. I've never been turned down by a fellow REALTOR® AE when requesting information about a new idea, and I bet you haven't, either.

In this edition of REALTOR® AE magazine, we look back on some of the great ideas from the past and offer a few new ones for your consideration. Our members expect us to be dynamic, but they never said we had to do it on our own. Thanks to all the AEs who shared the innovations in these pages.

There are several REALTOR® and association partnerships now working on important topics you need to watch. I've been fortunate to participate in some of these efforts, and it is reassuring to see the cooperative spirit

that exists between our members and NAR state and local associations when focused on a common goal.

One initiative is a discussion on the best way to facilitate our members learning and living the Code of Ethics. The goal of the COE training is to promote more ethical activity in the real estate transaction. The method of successfully accomplishing this, however, is less cut-and-dried. NAR Leadership formed a Code of Ethics Presidential Advisory Group to address this issue. The PAG has not formulated any recommendations yet, but there is a good faith effort to recognize the administrative burdens and practical challenges of the current program and facilitate an open and honest dialogue about possible options going forward.

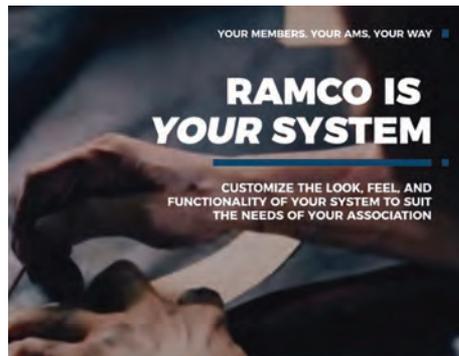
There are also joint REALTOR® and staff discussions about RAMCO. RAMCO was "created by AEs for AEs" as there was a great need for a robust association manage-

ment system. The recently approved NAR 2020 budget includes funding for taking RAMCO's productivity to the next level and providing an improved customer experience with expanded training efforts. I think we all welcome the recognition that RAMCO can and should be the best tool for recording and managing membership data.

The Association Executives Committee currently is overseeing its first advisory board that includes members along with AEs. The Volunteer Leadership Advisory Board has embarked on the task of helping associations with the constant challenge of developing and training the next generation of REALTOR® leaders.

What I see most in my participation in the NAR PAGs and working groups that include members and AEs is a clear display of mutual respect, empathy, cooperation, and innovation. If there were ever barriers that separated us in the past, they are most certainly gone today. For as Benjamin Franklin once said, "If we do not hang together, we will surely hang separately."

In closing, I would like to recognize Janet Cane, RCE, CAE, CEO of the MetroTex Association of REALTORS® in Texas, who will serve as the 2020 AEC vice chair. Janet will join Chair John Sebree, RCE, CEO at Missouri REALTORS®, as a great leadership team representing you at NAR.



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“Hey, Google, open Ask a REALTOR®”

Are You Ready to Deliver Association Services via Voice?

If you're not already asking your Google Home device to play your favorite Netflix series on your TV or telling your Amazon Alexa voice assistant to order more dish soap, you soon will be.

Devices that respond to voice command, from smart speakers to smart lightbulbs to smart doorbells, are surging in popularity. One recent report* estimates that 26% of Americans now own a smart speaker through which they can access digital assistants such as Amazon's Alexa, Google's Assistant, or Apple's Siri. These artificial intelligence interfaces can connect with tens of thousands of other household devices.

Perhaps more importantly, studies suggest that consumers are crossing a threshold from testing these assistants to relying on them throughout their day to deliver information, perform tasks, and entertain.

Could voice be the next best way to reach members?

It may be too early to tell, but that hasn't stopped a few pioneering REALTOR® associations from jumping on the digital assistant bandwagon to deliver association news, podcasts, courses, and even home search via voice command.

“With the advancement of voice technology, we are strategically looking to be a part of the conversation instead of needing to react in the future,” says Kevin Juliano, digital director of the Pennsylvania Association of REALTORS®. Through a voice application launching this summer, PAR will deliver daily posts from its popular JustListed blog, highlights of member benefit programs, legal hotline information, and news about what the association is working on in the legislative arena. Juliano says it's an affordable experiment in member communication. “Our plan is to see how members react to these options and slowly add additional content including podcast-style updates read by association staff and other video updates we currently produce.”

The Greater Capital Association of REALTORS®, N.Y., launched its voice application on Amazon Alexa and Google Home in late 2018 to provide news, course schedules, market statistics, and other key association information.

Other state associations including Florida, Nevada, and Illinois are working on, or have launched, voice applications that do everything from facilitate member response to calls for action, register members for

events and classes, and deliver news.

But, if you're not clear on how smart speaker voice applications actually work, you're not alone. “There's a lot of confusion about the voice environment,” says Sal Prividera, chief operating officer of voice application developer Voiceter Pro and former communications director for the New York State Association of REALTORS®. “We haven't made it to the Star Trek future where you just speak normally and the device understands exactly what you mean and delivers a result.”

For example, if you ask your Alexa, “Find me a home in Syracuse, New York,” it will most likely respond with: “I'm sorry, I don't know what you're looking for.” However, if you ask it to “Open CNY REALTOR®,” the voice home-search application created by the Greater Syracuse Association of REALTORS®, you'll have a conversation like this:

You: “Alexa, open CNY REALTOR®.”

Alexa: “Hi, let's get started on finding you the right home. Do you want to buy a home, rent, find out your home's value, or search for open houses? If you need me to help you along the way, just say 'help.'”

You: “Buy.”

* “U.S. Smart Speaker Consumer Adoption Report 2019,” May 2019, Voicebot and Voicify.

Alexa: "Great, tell me all about your dream home. Where is it located? You can tell me a city, county, or ZIP code."

You: "Syracuse."

Alexa: "Syracuse. Let's find homes that meet your budget. You can tell me a price and I will search for homes slightly above and below it."

You: "\$250,000."

Alexa: "\$250,000. You bet! Please tell me more about your dream home. How many bedrooms does it have?"

You: "Three."

Alexa: "Three bedrooms. I like where you're going with this. Would you like to tell me more about the features that would be in your home?"

You: "Yes."

Alexa: "How many bathrooms do you want?"

You: "Two."

Alexa: "Two bathrooms. Are you looking for a place to park your car?"

You: "Yes."

Alexa: "Way to go! I found 45 homes for you. The top three are [gives addresses and prices]. Please check your email for a link to your search results. Would you like to hear about the ones that are open this weekend?"

The Greater Syracuse Association of REALTORS® partnered with Voiceter Pro to create this home search application that draws information from the association's MLS. (NAR changed the IDX rules in 2017 to allow for voice search.) Together, the association and Voiceter Pro scripted responses to the most common questions and gave consumers the option to have search details

sent to their phone via text or to their email address.

"I see every MLS having a voice component to its public search eventually," says Prividera. "It's early, but five years out, I think most MLSs and associations will have adopted voice and consumers will be expecting it."

Developing an association voice application is similar to developing an association smartphone app; in other words, it's not something you're likely to do on your own. Amazon lists dozens of application providers on its website and more are joining this lucrative tech niche every day.

Once you've selected a company to work with, you script the questions, answers, prompts, and responses. You'll update the application frequently with new information and expand its catalog of responses.

To deliver association news, for example, you could record a news podcast every week or have Alexa or Google read the headlines from each e-newsletter item and, if the listener is interested in more, send the article link to the member's phone.

"Voice gives associations more avenues to reach members," says Stephen Gasque, director of broadcast communications at the National Association of REALTORS® and head of its voice application initiatives. "Voice can leverage content associations already have and deliver it in a way that members can consume conveniently as part of their day while they're on the go."

NAR's newest voice application, "Ask NAR," is due out in early 2020 and is designed keep members informed about



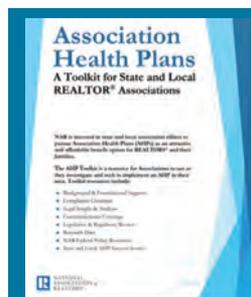
Amazon's voice assistant Alexa will integrate with the car infotainment systems of new select Ford, Volkswagen, BMW, and Toyota automobiles, and is now available on car accessories from a wide range of manufacturers including navigation company Garmin (pictured).

issues, events, and benefits at the national level. It will be able to reach members where they spend most of their time, which is in their car or waiting for appointments. Members could ask their Amazon Echo Auto, for example, "How do I find my NRDS number?" or tell their Siri device to play the latest Real Estate Today podcast. Most importantly, however, the application will alert members to calls for action and can even dial their member of Congress to discuss the issue.

NAR's "Ask a REALTOR®" voice application for consumers currently offers more than 200 responses to a wide range of questions, such as "What is an earnest money deposit?" and "How can I find out the value of my home?" NAR is adding new questions and answers to the application at the rate of several dozen a month.

Whether you're ready to jump on board or take a wait-and-see approach, artificial intelligence—of which voice technology is a part—is the fastest-growing tech segment in the world and shows no signs of slowing.

—Carolyn Schwaar

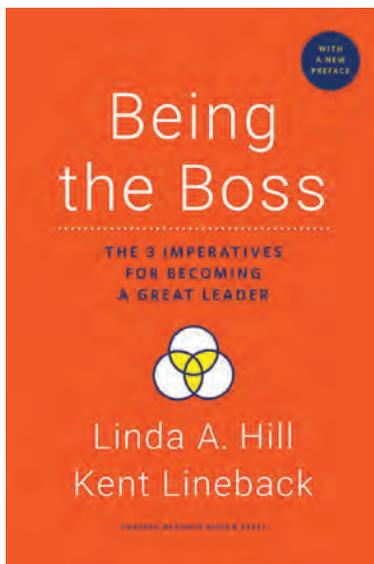


New NAR Guidance on Association Health Plans

To help state and local REALTOR® associations in their efforts to explore implementation of Association Health Plans (AHPs), the National Association of REALTORS® created a new toolkit of resources designed to navigate the legislative and regulatory landscape in their areas and tackle

barriers to adoption while the federal litigation continues to delay broad national implementation.

The AHP Toolkit includes background information, compliance guidance, legal insights, research data, and state and local AHP success stories. Visit nar.realtor/ahptoolkit.



◀ “Few people become effective managers by simply following their gut. Thus, you will need not just self-awareness but self-control, personal discipline, determination and resilience.”

—*Being the Boss: The 3 Imperatives for Becoming a Great Leader*

The 3 Imperatives for Becoming a Great Leader by Linda Annette Hill and Kent Lineback. This guide is not only for those who are new to management, but also for those who have been in management positions and want to continue to develop and improve their skills.

The authors use a fictional company to illustrate the three imperatives, and each chapter opens with a scene from a new manager’s first week on the job. These case studies helped me follow how these imperatives can be implemented. At the end of each section, the authors provide a series of questions for you to assess where you are in your own management journey.

Being the Boss is divided into three sections that mirror your responsibility as an AE: “Manage Yourself,” “Manage Your Network” (leadership and members), and “Manage Your Team” (staff).

The first imperative, “Manage Yourself,” focuses on your relationship with the people you manage and the connection between influence and trust. I am the AE of a 2,000-member association and I supervise three full-time staff people. There are challenges to managing a small staff and drawing the line between being friendly and being a friend. Hill and Lineback state, “Management begins with who you are and how people perceive you. Don’t focus your relationships around either authority or friendship. Build them on trust in your competence and character.” This has helped me in my daily interactions with not only my staff but also my board members.

The second imperative, “Manage Your Network,” may resonate more with those who are managers in a larger organization,

so I viewed my networks to be my fellow AEs and the members of my association. The best takeaway from this section was on building and sustaining key relationships. I am an introvert and networking is a challenge for me, which is why I appreciated that the authors outlined specific steps for building a network, such as, “Set your mind to engaging others, approach it with the right attitude, use any social tools available, find a style you’re comfortable with, and then work it systematically and diligently.” Basically, force yourself to network until it becomes second nature.

The third imperative, “Manage Your Team,” is the section that really hit home for me. It is also the most heavily highlighted, starred, and marked section of my book. As a new AE, I “inherited” three staff members who were not functioning as a team. My goal was to change that dynamic, but I was met with resistance because I was attempting to make changes without a clear plan and common goals. Hill and Lineback define a team as “. . . a group of people who do collective work and are mutually committed to a common team purpose and challenging goals related to that purpose.” I needed to slow down, develop a plan, and then work to create buy-in from staff. The chapter “Be Clear About How Your Team Works” is the one I refer to the most because it covers how to clarify specific roles of your team and also how the team makes decisions, how to shape team culture, and, most importantly, how to coach and evaluate your team.

There is a sign in my office that defines a boss as a person who exercises strength, authority, and understanding for the greater good. If only it were that easy. Being the boss has great rewards, but it is by far the most challenging role I have undertaken (outside of raising two boys). Having this book in my proverbial toolbox has helped me grow as an AE and a leader.

You’re the Boss: Now What?

Reader: Kaaren Winkler, RCE, Tacoma-Pierce County Association of REALTORS®, Wash.

After 12 years working on the staff of a state REALTOR® association, I made the leap in 2016 to become a local AE. Although my experience working at the state association prepared me for many aspects of my new position, I was feeling less prepared to be “the boss.” The saying “It’s lonely at the top” resonated deeply with me during my first few months.

I, like many of you, started reading every book recommended at AEI sessions and conferences to develop my management skills. My shelves became crowded with books such as *Spark: How to Lead Yourself and Others to Greater Success*; *Brief: Make a Bigger Impact by Saying Less*; *The Speed of Trust: The One Thing That Changes Everything*; and *The 5 Second Rule: Transform Your Life, Work, and Confidence With Everyday Courage* (with the accompanying journal, of course).

Then, while attending the NAR Leadership Conference, I had a 30-minute consultation with Carole Kaptur, NAR’s director of strategic association management, where she recommended the book *Being the Boss*:



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NAR's official Bluetooth REALTOR® lock-box system and leading provider of property access management solutions, **SentriLock**, is enhancing and renaming its popular mobile app this summer. The SentriKey Real Estate App enables members to easily access, sort, and share showing reports, and will feature a new more user-friendly design. To help you help your members get the most out of this member benefit, SentriLock offers an online marketing toolkit that includes ready-made flyers, social media posts, newsletter content, and graphics. Learn more at nar.realtor/RealtorBenefits/SentriLock.

Find more on the REALTOR Benefits® Program and resources for associations to communicate the value of REALTOR® membership at nar.realtor/RealtorBenefits/justforaes.



NAR Partners with Leading Commercial Listing Platforms

Looking for affordable and feature-rich platforms to market your commercial listings? The National Association of REALTORS®' new commercial property listing technology partners Brevitas and CREXi now offer all NAR members discounted rates on their services and subscriptions.

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CREXi, one of the commercial real estate industry's fastest growing marketplaces and technology platforms, also offers a suite of online tools to simplify and manage transactions from listing to closing. CREXi offers REALTORS® a 35% discount off its PRO offering.

When you subscribe to either of these partners, your listings will appear on NAR's Realtors Property Resource® and the partner platforms with enhanced RPR® data including demographic information, over- and underrepresented business types in a specific geography, and area consumer spending data.

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Georgia REALTORS® is commemorating its 100-year anniversary in 2020 with a range of celebrations and promotions including a REALTOR® license plate. Only active REALTOR® members of the Georgia REALTORS® are authorized to purchase the plate.



REALTORS® Take Capitol Hill

Hundreds of REALTOR® associations organized visits between their members and federal elected officials during the 2019 REALTORS® Legislative Meetings & Trade Expo in May. This group from the Coastal Association of REALTORS®, Md., spoke in person to their congressional representatives about issues affecting housing back home.

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Great Ideas

from the past six years of *REALTOR® AE* magazine, plus new ones!

One of the great things about REALTOR® associations is that they are not (for the most part) in competition with one another, so sharing great programs, products, and outreach ideas is encouraged. We've featured thousands of great ideas from hundreds of associations in the pages of *REALTOR® AE* magazine. Here are just a few of our favorites from past issues designed to inspire, guide, and motivate you to try something new.

Check the box of the ideas you want to implement.

Great ideas in ASSOCIATION MANAGEMENT

Every year, the Minneapolis Area Association of REALTORS® **pays all expenses for three members** to attend the National Association of REALTORS® Midyear Legislative Meetings & Trade Expo. The association's investment has been worth the cost because not only are members updated about advocacy action by their peers, but 95 percent of those who have had their expenses covered have gone on to serve on MAAR committees and more than a third on NAR committees.

The Kansas City Regional Association of REALTORS® launched a partnership in 2017 with the Henry W. Bloch School of Management at the University of Missouri–Kansas City to develop the UMKC REALTOR® Leadership Academy, a **seven-month leadership development program** designed to provide REALTORS® with advanced education in management,



business planning and development, state and local government affairs, and personal growth.

One of the most effective, and overlooked, methods of providing real value while streamlining services is **collaborating with other associations**. There are infinite ways to cooperate with your neighbors, or even with those farther away with virtual means (and needs). There are also many opportunities to share with community organizations that have similar goals, such as the local builders association,

chamber of commerce, homeless shelters, and banks.

The Greater Rochester Association of REALTORS® in New York recently launched an **online membership portal** where members can log in to a personalized page to pay their dues and register for classes. The portal (a new feature in their membership software solution) also has personalization capability, enabling the association to select groups to target for customized messages.

“The advantage of **merging with larger boards** is, generally, the resources and the professional staff that are on board, and this enables the small-board members to dream bigger.”

— Kipp Cooper, RCE, CEO, Kansas City Regional Association of REALTORS®

The skills required to run a successful REALTOR® association are deep and constantly evolving, but **instead of hiring new workers**, consider training existing employees, sharing staff with another association, educating yourself to do the task, hiring freelancers, outsourcing to specialized contractors, and seeking out talented volunteers.

“Our biggest success lately was **purchasing a new headquarters building** that is more centrally located in our jurisdiction. It provides more staff office space, a classroom, and more rental space. I learned that members are excited for the move and that they are looking forward to being better served.”

— Nicole Banbor, RCE, AE, Metro Centre Association of REALTORS®, N.J.

The Tennessee Association of REALTORS® educational foundation generated \$16,500 from the approximately 1,100 REALTORS® in the state who ordered or renewed its special “Celebrating Homeownership” **automobile license plate**.



The Scottsdale Association of REALTORS®’ stylish **Wi-Fi café** **attracts members** to work and meet with clients with comfortable seating options, soft music, a patio with seating and TVs, fresh food, and, of course, coffee for sale.

The Southland Regional Association of REALTORS®, Calif., **specifically**

seeks out members of different backgrounds and areas of expertise to run for the board. The two primary reasons: to assemble a board that represents the diversity of its membership (geographic location, race, age, and other aspects) and to find leaders who represent varied business functions, including residential sales, commercial sales, and property management.

“As an organization, we traditionally recognize REALTOR® Safety in September, but it’s really a year-round job. I’m encouraging you to make a **year-round commitment to member safety**.”

— Jarrod Grasso, RCE, CEO, New Jersey REALTORS®

To understand which association products and services have the most value for members, the Northern Virginia Association of REALTORS® created the **member-led Products and Services Advisory Focus Group**. Its mission: to help NVAR better understand, from the member perspective, how to organize the aggregated

products and services from the local, state, and national associations in a way that will best benefit members’ businesses.

Members explaining the value of their membership is your most powerful marketing tool. Arm your leaders with a **script about the value** of each

major member benefit so they are ready to promote membership value wherever they go. Plus, craft a page of testimonials at your website to showcase members’ unique membership value stories.

When leadership or staff violated the association’s social media guidelines by posting something confidential or



severely objectionable, Teah Hopper, former vice president of marketing and communications at Missouri REALTORS®, had a plan. She’d meet with her CEO, identify specifically **which of the**

social media or other policies was violated, and then seek input from in-house legal counsel before approaching the member directly.

John B. Leonardi, RCE, CEO, Buffalo Niagara Association of REALTORS®, N.Y., presents a four-hour, **55-slide leadership orientation program** that takes his new volunteers through all the information they need to feel fully integrated and comfortable with their positions and to understand the AE’s role.

“Nonprofit is our tax status; it is not our business plan. **Diversifying our income is essential** to keeping membership dues low while also offering attractive, high-quality services to our members.”

— Dave Stefanides, CEO, Orange County REALTORS®, Calif.

The most well-written and well-intended sexual harassment 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.

“The **biggest complaint about recognition programs** is that they feel contrived and procedural instead of sincere. If the message of appreciation isn’t believed to be genuine, you’re wasting your time. Take the time to learn how volunteers perceive appreciation.”

— Guyla Greenly, former CEO, Wyoming Association of REALTORS®

Great ideas in COMMUNICATIONS

Real estate infographics can be fun and powerful if you use the right tools. Here are **some cheap and easy online services** and apps recommended by REALTOR® association staff that enable you to create your own infographics: Piktochart, Venngage, Easel.ly, Canva, Infogram.

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

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

During the national association’s midyear meetings, the Bay East Association of REALTORS®, Calif., **engaged a small group of correspondents**

(directors, officers, and staff) to bring news from D.C. back home to members via the association’s Facebook page.

At the Memphis Area Association of REALTORS®, boosting event participation started with a

contest to win a digital camera. Members were entered to win by posting photos from Member Appreciation Week events. The goal of the contest was to **attract members to the events**, but it also increased the association’s social media following. And, of course, with more followers there’s a wider audience for the next promotion.

The Long Island Association of REALTORS®, N.Y., has used **Twitter to promote discount codes** for association products and services to boost event attendance. If someone liked or commented on the association’s social media posts, they’d also get special offers.



The result was increased participation over that of previous years and more member followers on Twitter.

Using the popular **“events” feature on Facebook** helped the Emerald Coast Association of REALTORS®, Fla., generate a 10–15% increase in attendance at events. Even though the association has

to then manually register members from the Facebook list, the member convenience makes it worthwhile, the association says.

When it comes to email subject lines, shorter is always better. According to an Informz study, **subject lines with fewer than 10 characters** were

opened the most. Short, clever subject lines are even more important today since a smartphone displays far fewer characters at a time than a computer.

A well-organized, regular e-newsletter is more effective than multiple, random emails, as NAR learned when it **consolidated dozens of newsletters** into a more streamlined and less-frequent format.

The Mississippi Association of REALTORS® **multiyear rebranding plan** began with a new name, Mississippi REALTORS®, and a new logo and tagline: “Property Professionals—Community

Champions.” The new brand focuses on professionalism and community and political advocacy.

“Your volunteer leaders are used to answering questions from clients on a daily basis. But they should **never talk to reporters as if they were clients**, and never have their guard down, because with reporters everything is on the record, even if it feels like unrelated small talk.”

—Eric Berman, RCE, communications director,
Massachusetts Association of REALTORS®

“Associations really need to **treat communications strategies like their members treat lead generation.**

You’re basically trying to do the same thing: get members to buy in to your association through your channels and ‘close’ them by moving a metric, for example, more online engagement, higher event attendance, or more participation in calls to action. The key is to go to where the bulk of your membership is. Stop wasting time where they’re not.”

— Nobu Hata, director, industry outreach
and engagement strategy,
National Association of REALTORS®

Providing media training to all volunteers, not just the president, will benefit the association in the short and long terms. There will be volunteer leaders who can be backups in case the president is unavailable, and future leaders will be better prepared when their time to lead comes.



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Great ideas in CONSUMER OUTREACH

The Maryland Association of REALTORS® builds REALTORS®' credibility with the public and the legislature by directly educating consumers on housing issues with its homebuyer education program. It also has a **REALTOR®-branded consumer-focused website** (marylandhomeownership.com) where members can refer clients for reliable information on homebuying, housing assistance programs, and avoiding foreclosure. These tools are also used, when needed, for issues advocacy.

Encourage members to spend some of their **free time serving on non-REALTOR® local boards** or planning committees, transportation task forces, or even public groups such as their local PTA. This creates valuable opportunities for them to influence public opinion about the association and what REALTORS® bring to the community.

Seattle King County REALTORS®' Housing Translator campaign (HousingTranslator.com) is designed to reach out to consumers and demonstrate REALTORS®' understanding of today's complex real estate market and to position the association and its **members as leaders in proposing solutions** for those who desire to be homeowners in the region.

"Hosting an **affordable housing program** in our distressed city was our greatest success [in 2016]. Many potential buyers didn't realize they could afford and qualify to buy a home. They didn't even try because they didn't think it was a possibility until they came to our event."

— Della Csehowski, RCE, CEO,
Cambria Somerset Association of REALTORS®, Pa.



The Spokane Association of REALTORS® hosted the first **enterprise drone conference** in the Pacific Northwest in 2017. The one-day conference focused on understanding drone applications, operations, safety, legality, and potential. JD Claridge, CEO and co-founder of drone manufacturer xCraft, was the keynote speaker. Tickets sold for \$150.

The San Antonio Board of REALTORS® inspired members to share **why they became a REALTOR® in a savvy Facebook campaign** promoting the hashtag #UseARealtor.

Repost **NAR's social media materials and videos** on your association's Facebook or Twitter page and encourage members to add the local perspective. Find materials on the NAR Facebook page (@NARdotRealtor) and follow NAR on Twitter (@NARdotRealtor).

The Richmond Association of REALTORS®' long-running **"We Are The R" public awareness campaign** is successful because the association got

members to back the content and drive the campaign to consumers. "If your campaign is a top-down, all staff-driven effort, it will cost much more and be far less effective," says Kelsey R. Croston, vice president of brand experience. "Video has yielded our highest engagement rates with members."

The San Antonio Board of REALTORS®' most popular and successful consumer outreach has been **paid segments on local morning television talk shows**. "In these segments, our spokespeople, who are current association volunteer leaders, discuss buying and selling tips while emphasizing why a REALTOR® is a necessity in each step. These segments allow us to go in-depth on the REALTOR® value, but they appear as interviews rather than sponsored content, which lends increased credibility," says Suzanne Westrum, vice president of communications and marketing.

The Northeast Association of REALTORS® in Westford, Mass., holds an **annual food drive to benefit a local food bank**. Members work with local grocery stores and the food bank to

coordinate a day to staff donation tables outside the stores and collect thousands of pounds of food.

Dozens of local associations take part in the Pennsylvania Association of REALTORS® annual **REALTORS® Reach Out month** by sponsoring events ranging from food drives to neighborhood cleanups.

Michigan's Greater Lansing Association of REALTORS® created an **Adopt-A-Park program** as part of its placemaking initiative. Every year the association adopts a neighborhood park where REALTOR® and affiliate volunteers gather to paint, refurbish, plant, and create a community destination.

The Santa Cruz County Association of REALTORS®, Calif., partnered with the Soquel Unified School District to produce an **18-month calendar called "Protecting the American Dream,"** which promotes the use of REALTORS®.

The Emerald Coast Association of REALTORS®, Fla., along with other area organizations, has for many years sponsored a day of fishing for 65 wounded

warriors as part of the **annual Soldiers on the Water**, an event designed to be a token of gratitude for their service and sacrifice.

Although many associations are mainly focused on promoting the value of using a REALTOR®, it's critical to set aside resources to **promote the value of your association**. After all, members who understand the value of membership create stronger associations.

"I drop in to members' offices when I'm in the neighborhood, just to make sure I'm staying in touch with what agents deal with on a day-to-day basis. Our association **bought a van recently and wrapped it with our logo**, so we're more visible in the community."

— Laura Crowther, RCE, CEO,
Coastal Carolinas Association of REALTORS®.

The Fort Collins Board of REALTORS®, Colo., established its Future of Housing Community Foundation as a 501(c)(3) organization **to formalize the association's commitment to community outreach**, boost its public profile as a contributor to the community, and enable



the association to leverage additional dollars from the state.

Fourteen homes in an urban Kansas City neighborhood were revitalized by 300 REALTORS® during the 2016 Rock the Block, an event sponsored by the Kansas City Regional Association of REALTORS®

and Habitat for Humanity to **improve quality of life and home values**.

The Coastal Association of REALTORS®, Md., prepares **year-end market reports for local municipalities and counties** as a complimentary service for elected officials.

These reports contain statistics on sales, prices, days on market, and more. Association staff also give presentations on these reports at local government meetings.

Associations of any size looking to boost their consumer outreach initiatives can modify any of the **Consumer Outreach Strategic Plan Templates** and follow the great ideas of other REALTOR® associations uploaded into the Consumer Outreach Best Practices database. Both are available at nar.realtor.

When associations **promote the NAR consumer awareness campaign**

That's Who We R materials in their local market and association communications, members see the association doing something for them and their business. Download at ThatsWhoWeR.realtor.

Joining forces with colleagues from the local chapter of the National Association of Real Estate Brokers and the National Association of Gay & Lesbian Real Estate Professionals, Columbus REALTORS® hosted a **Cost of Poverty Experience and dramatized a mock trial** to highlight issues addressed by the Fair Housing Act that are still at play in their communities.



Great ideas in

ADVOCACY OUTREACH & RPAC

The Fort Collins Board of REALTORS® had success recently in **boosting its profile as a champion of housing affordability** by distributing copies of NAR's *On Common Ground* magazine and providing resources on its website and social media accounts about affordability.

"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

When the city of Scottsdale, Ariz., proposed a restrictive sign ordinance, the Scottsdale Area Association of REALTORS® reacted with a **"call for action" that generated nearly 500 letters to city council members**. That got the city's attention, and with a Land Use Initiative review provided by the REALTOR® Party, the REALTORS® helped the city see reason.



As RPAC celebrates its 50th anniversary in 2019, Mississippi REALTORS® has raised the bar for RPAC investment. During its winter meetings this year,

the small state association hosted a lively "Drawdown and Lip Sync" event supported by a REALTOR® Party grant—and collected more than \$83,000 for RPAC.

Even if a REALTOR® association advocacy success story isn't in your backyard, you can **still showcase the efforts of the REALTOR® organization**



and assure members that NAR's experts, resources, and grants are available for your local efforts.

"Members have varying degrees of interest in politics, but when **we get them to Government Day at the state capitol** meeting with lawmakers, for the most part, we change attitudes and open their eyes to the view the legislators have from the inside."

— Bruce King, government affairs director,
REALTORS® Association of Northwestern Wisconsin

The Greater Milwaukee Association of REALTORS® **"Home Affordability Report" has become an attention-grabber** in the local media and an additional, no-cost benefit for association members. The centerpiece of this quarterly is a chart that breaks down recent home sales by suburb and, within Milwaukee, by section of the city.

The Madera Association of REALTORS®, Calif., teamed up with the local school district to hold a **bus tour of affordable homes** for new and potential teachers. All attendees received a home booklet with listings, advice on using a REALTOR®, and advertisements from affiliate sponsors including lenders and insurance companies.

The South Shore REALTORS®, Mass., used a \$2,500 Placemaking Micro-Grant from the REALTOR® Party to fund and plant an organic community **garden that transformed a local rural**

property into a natural community gathering space.

The Ada County Association of REALTORS®, Idaho, took a **direct approach to RPAC fundraising: calling and asking**. The association's RPAC committee took to the phones one afternoon to reach out first to top producers and those who had given only at the fair-share goal, then to other members. The group raised \$5,000 within hours.

"Events that incorporate a fun activity are far more successful for raising RPAC contributions than email or other passive solicitations. Our **karaoke night and auction raised \$50,000 for RPAC** in one night."

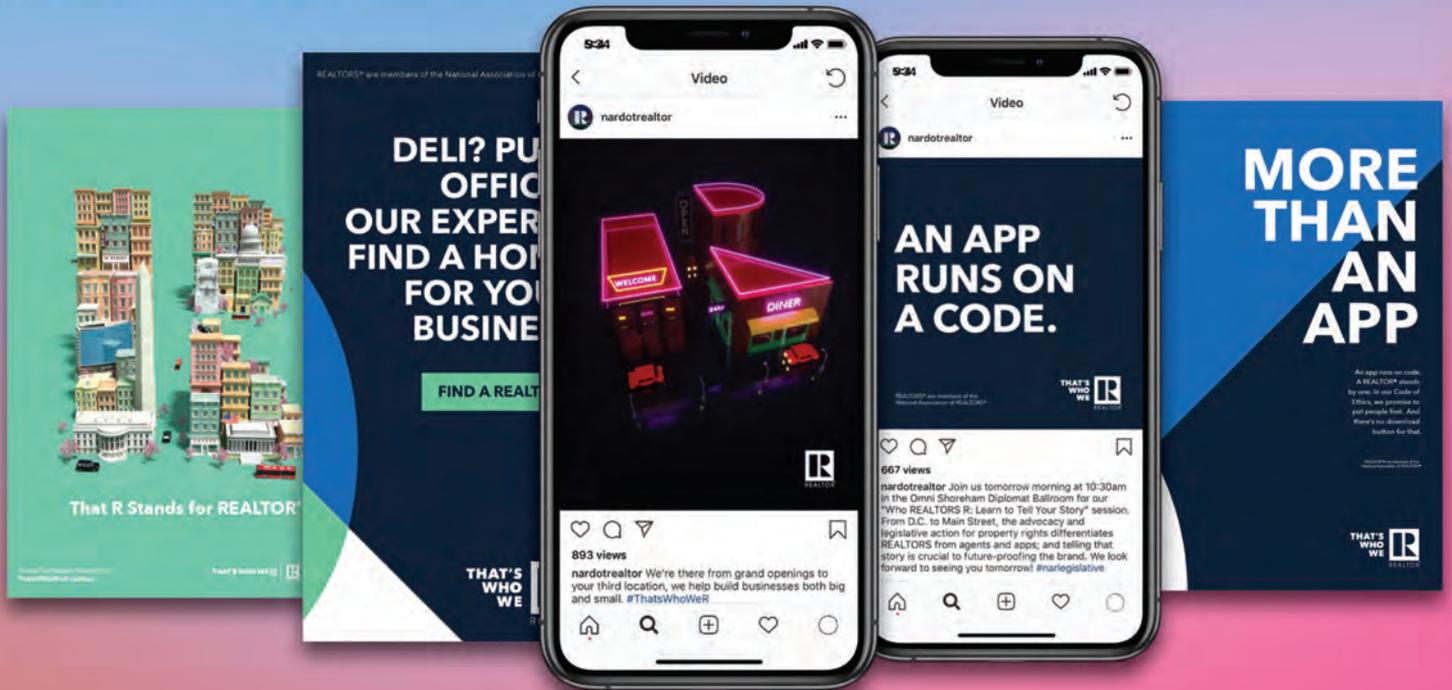
— Duncan MacKenzie, RCE, CEO,
New York State Association of REALTORS®

The Coeur d'Alene Association of REALTORS® **raised more than \$17,000 for RPAC in 2013 with a luau** and pig roast gala event and prize raffle. Prizes included iPad Minis, gift cards, gas cards, free homes magazine advertising, and a weekend hotel stay.

The Texas Association of REALTORS® build a portal for member to access all **"REALTOR® Day at the Texas Capitol" resources** in one place online, including custom talking points for each of the 181 lawmakers. Access at TexasRealEstate.com/RealtorDay.

AN AD CAMPAIGN EVERYONE CAN USE

We built campaign materials so your association and your members can leverage the success of the national ad campaign to showcase who REALTORS® are in your local market. For downloadable and customizable assets like logos, social media messages and images, online banners, print ads and more, go to ThatsWhoWeR.realtor.



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THAT'S WHO WE 

 NATIONAL ASSOCIATION of REALTORS®

Great ideas in

MEMBER OUTREACH

Younger members crave “status boosting” community outreach opportunities, where they can help build a Habitat for Humanity house or plant a community garden, then **post about their good deeds on social media** to their friends and potential clients.

“When my association applied for the **Tier 1 Smart Growth Grant through NAR**, I was shocked by how easy the process was. We received a \$1,500 grant and used it to host a four-hour continuing-education course designed by NAR called ‘Smart Growth in the 21st Century.’ We offered it to members for free and the response was outstanding.”

— Amy DuBose, RCE, AE, Bryan-College Station Regional Association of REALTORS®, Texas

Although communicating value is more powerful than listing programs and services, that doesn’t mean that you should throw out your benefits brochure. The Portland Metropolitan Association of REALTORS® in Oregon distributes its **four-page member benefits and value brochure** with dues mailings and posts it online.

“Our YPN council members know how to draw crowds, and they try to **personally invite members to events** instead of just relying on email blasts or Facebook invites. More younger members attend events because fellow young members are planning the content and reaching out.”

— Jenny Gailey, communications and professional development director, Rockford Area REALTORS®, Ill.

Attendance at the Charleston Trident Association of REALTORS®’ annual



Residential Market Update has nearly doubled in the last five years **since the association made an effort to attract millennials**. Content is key to connecting with members, and for millennials, the value proposition of any event needs to include a philanthropic component and a business or personal improvement portion.

The Dayton Area Association of REALTORS® has programmed its member management software to **wish members a happy birthday** and a happy anniversary of when they joined the association.

The West Michigan Lakeshore Association of REALTORS® acknowledges REALTORS® who have passed away with its **REALTOR® Memorial, a park-like setting** on the southwest side of the association’s headquarters. Anyone who was a member at the time of their passing has their name etched in granite as a permanent tribute.

The Washington REALTORS® **“Put the R on Your Car” bumper sticker campaign** was successful in fostering REALTOR® pride throughout the state. More

than 650 members submitted photos of the “R” bumper stickers on their cars.

Develop a **plan for each social media campaign that will build community** and conversation around the item or program that you’re featuring. For example, don’t plan on just using social media as a distribution channel for your CE class campaign; post thought-provoking questions about why members should take this class.

“The gap between broker and association is growing. Those associations that have **decent broker relations tend to have more relevant education**. Those who don’t end up offering the same basic classes over and over again to members who won’t implement a thing.”

— Nobu Hata, director, industry outreach and engagement strategy, National Association of REALTORS®

“The **panel of past state presidents discussing their personal leadership journeys**—their challenges and successes—can get very personal, emotional, and gratifying for all involved [at the association’s leadership training]. Watching the connections that form between our great past leaders and those who will be following in their footsteps is magical.”

— Steve Francks, RCE, CAE, CEO, Washington REALTORS®





Allow younger members to lead, because they generally don't like being told what to do and how to act. Work with them to create a member value program that may look a little different than it did a few years ago. As an association, be willing to **let go of programs that will not serve your new dynamic and energetic membership.**

Mentor matchmaking between seasoned pros and less experienced members is a powerful draw. **One-on-one advice from industry veterans** is one of your association's most valuable assets, and you can offer it to newer members for free.

Launch a YPN and a YPN Facebook group that blend the power of technology (24/7 access to your association) and the power of the personal (social networking online and in person at fun events).

Recognize and support your young members with a rookie of the year award, a young professional service award, or a stipend to attend a state or national real estate event.

Great broker events begin with asking brokers about current issues they face and using tools such as SurveyMonkey to poll their interests. Discover their concerns so you can plan a meaningful agenda that is timely, practical, and valuable to brokers.

The Iowa Association of REALTORS® hosts **broker summits that attract more than 100 brokers at each event**, including many from rural communities. Recent topics have included risk management

(with a focus on rural issues), local economic development, and the benefits of participation in advocacy.

Always charge a small fee (\$15 to \$50) for events because if you give it away, it has less perceived value. Plus, whenever possible, offer CE credits.

"If you have a great education 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."

— Jim Haisler, RCE, MRE, CEO, Heartland REALTOR® Organization, Ill.

With funding from NAR's Commercial Innovation Grant program, the Akron Cleveland Association of REALTORS® **launched an education program with industry partners** that attracts nationally

known speakers to address cutting-edge topics facing the region.

Building or rebuilding trust among large broker members may be as simple as visiting them in their offices. Another way to encourage broker participation is to **create events especially for broker-owners.**

"Texting is something our members said they'd like us to use only for urgent messages that need their immediate attention, including calls for action and legislative advocacy."

— Steve Reese, REALTOR® and former VP of marketing, Oklahoma Association of REALTORS®

Seek out seasoned members who have embraced technology and ask if they'll be **role models for technology use.** Feature them and their technology use in your print publications, ask them to become technology mentors to other members, or invite them to test new association technology offerings and offer feedback.



How to Generate Non-dues Revenue (with Less Stress)

Large or small and mighty, all REALTOR® associations need resources. They need funding for programming, events, and everyday operations. Member dues help offset these costs, but non-dues revenue is still essential for a healthy association. Cultivating these revenue streams helps you optimize how you serve members.

Many tactics

There are many ways to do this. Your association has probably tried a variety of tactics already. According to a survey conducted by the Center for REALTOR® Development in 2016, associations were acquiring most non-dues revenue from five sources: affiliate member dues, MLS dues and fees, continuing education credit classes, association store or merchandise sales, and renting out space or facilities. Lower on the list were advertising sales, income from real estate school, non-CE classes, award programs, annual conferences, member list rentals, member business services, and data/MLS data sales. Finding what works is a big deal, as nearly a quarter of the survey respondents reported that non-dues revenue makes up 6% to 10% of their annual budget.

Many challenges

As an AE, you've probably experienced the challenges that come along with developing and running non-dues revenue initiatives firsthand. You may not have enough staff, and volunteers may also be in short supply. A committee might start out strong and then lose focus. Members might not be aware of events, or they might not be interested in what's being offered.

In the 2016 survey, respondents cited both the effort involved and lack of member interest as reasons for failed initiatives.

Many types of programs and events do involve a lot of organizing, coordinating, and promotion. So how do you decide which ones are worth it?

Focus on what members really want

Putting effort into something members aren't interested in, or don't find valuable, is a waste. So what do members really want? Affiliate member dues and MLS dues and fees aside, the 2016 survey showed that the top non-dues revenue stream was continuing education classes. Additionally, respondents who had previously surveyed their members reported finding that members would be willing to pay for three things: shorter and higher-quality CE classes, more networking events, and technology classes. It's clear that education is important to REALTORS®.

Supplement live classes with online education

Members want education. But it's not always possible to host live classes as often as members want them. And hiring qualified instructors, scheduling, and promotion takes staff time.

This is where online courses come in. Offering a robust catalog of online courses allows members to grow their designations and certifications on their own time. This means you can be strategic in how often you plan and host live classes.

Become a Center for REALTOR® Development (CRD) Affiliate

You can partner with us to offer all of CRD's courses to your members, including the required courses for each of the National Association of REALTORS®' official designations and certifications. Members can also take elective courses and view presentations



and webinars.

You'll earn 15% on course registrations when students originate on your site. It's free to join and we don't require a sales quota. You'll also be able to offer special savings opportunities to your members every month.

Becoming an affiliate is simple. All you need to do is read through the Affiliate Agreement, fill out your application and submit it. Then you can generate unique links for your association in the Affiliate Engine.

We'll help you keep the momentum going

We want this to be a hassle-free non-dues revenue stream for your association. Every month, we'll send you new banners and promotional copy to send out to your members. You can also make use of all CRD course graphics and logos.

And we're always here to discuss marketing strategies with our affiliates. Just send an email over to CRD@realtors.org to get the conversation started.

It can be easier than you think to generate non-dues revenue, and you don't have to do it alone. Visit onlinelearning.realtor/a/home/affiliates to find out more about becoming a Center for REALTOR® Development (CRD) Affiliate.

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Benefits for Associations

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Benefits for REALTORS®

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Contact us at CRD@realtors.org



Great ideas in BEING A BETTER AE

“Life as a REALTOR® AE is never boring. In order to be successful in the long term, **remain flexible and adaptable**, bring your A game to the show, work hard, never stop learning, keep the members front and center, and surround yourself with people smarter than yourself.”

— Ginger Downs, former CEO, Chicago Association of REALTORS®

“**Achieving my RCE designation** was both a personal and a professional commitment I made to myself and to establish a stronger foundation for my organization. It strengthened my core association management skills and provided refreshers in areas that I don’t deal with on a daily basis, so expanding those skills was important, too.”

— Denise Schultz, RCE, CEO, Lakes Area REALTORS® Association, Wis.

“Highly successful **CEOs are advocates of the values of homeownership**, property rights, and community—not because it’s their job, but because they truly believe in it. Their own internal principles are aligned with the direction and purpose of the REALTOR® organization.”

— Jerry Matthews, industry consultant and former REALTOR® AE

Whether it’s appointing volunteers to manage association programs or directing staff members to execute tasks you can focus on a larger vision, **delegating work to others is a sign of good leadership**. Delegating not only relieves your sense of pressure and work overload—it extends the boundaries of what you and your association can achieve.

“**Having the GREEN designation** and the expertise has helped me engage in important community dialogue, bring sustainability education to our area,

and promote important green data fields in our MLSs. GREEN is a great opportunity for members to add more value to the transaction. For AEs, the designation reflects on your association and positions it as a stakeholder and influencer in the local sustainability discussion.”

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

“The skill mentioned most often when associations search for new CEOs is relationships; in other words, it’s the ability to work with all types of people in virtually any situation. Among the intangible skills AEs desire, relationships is at the top of the list. A simple but **effective way to grow your people skills** is to be available. Take member calls and have daily in-person contact with others. Make eye contact as you engage others and meet everyone with a smile. Learn members’ names and use them often in conversations.”

— Jerry Matthews, industry consultant and former REALTOR® AE

Constantly **look for ways to save the association money** and advertise every dollar saved. From cutting back on office supplies to lowering the utility bill by conserving energy, if you become known as a saver, your expenses, like the new association vehicle, may receive less opposition.

“**Read a book for pleasure** while you eat your lunch. Then, when you get back to work, you’ll find that your stress level is lower, and the quality of your work is better.”

— Nicci Haynie, RCE, Texas Association of REALTORS®



“I set aside at least 30 minutes at the beginning of each day to **stay on top of industry technology and national business trends** so I’m prepared to explain how these broader movements could filter down to the small-town level and affect members’ businesses.”

— Lisia Amburn, RCE, e-PRO, AE, Lakeway Area Association of REALTORS®, Tenn.

A selfie taken at the convention center during the chaos of expo setup or a picture of you with a local lawmaker captioned with the issues you’re discussing goes a long way toward **showing members some of the aspects of your busy job**.

“Volunteers are great people. They volunteer because they are civic-minded and they deeply care for their association, but they aren’t our friends. **Maintain a professional relationship** and be an open and honest leader.”

— John Leonardi, RCE, CEO, Buffalo Niagara REALTORS®, N.Y.

“**Keep really good records**. If you are charged by a member before a board and threatened with legal action, those records will save you and your staff.”

— Carol Platt, former CEO, Osceola County Association of REALTORS®, Fla.

“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 AEI Year-Round Facebook group, where more than 700 REALTOR® association professionals share ideas and ask for guidance.”

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

Great ideas in TECHNOLOGY



If you don't want **your email and e-newsletter to end up in a spam folder**, a professional email service is essential. Not only will a professional service, such as MailChimp or Constant Contact, ensure that your text and images are properly formatted for any device, it will provide statistics on delivery and open rates enabling you to tweak your content for better results. Email services also manage unsubscribe requests and help ensure compliance with CAN-SPAM.

Besides cost and convenience, **REALTOR® associations outsource their IT services for other benefits**. First, technology moves quickly, and it's difficult for associations to keep pace. So, it might be easier to find the right IT skills from an outsourced provider.

The Greater Albuquerque Association of REALTORS® **seamlessly switched MLS platforms** by making the education campaign a game where members completed tasks to earn a series of badges and be entered to win an iPad.

To **help plan the technology track** at the annual Triple Play REALTOR® Convention & Trade Expo, Maureen Murphy, director of professional development at New Jersey REALTORS®, analyzes past attendee surveys, looks at what classes are popular at local associations, and asks local technology staff for recommendations. The conference's planning committee takes into account all of this data and scours the submitted presentations for new ideas.



"By using tools such as Google Analytics, we were able to **see where our website users hopped on and off the site**, what pages attracted views, and how long visitors stayed on these pages. Google Analytics is free and requires only a line of code in the footer of your site to begin pulling information. We learned that Facebook and Twitter were the main traffic drivers to our site. So by using social media to promote our biweekly blog posts, we saw page views increase."

— Andrew Sims, RCE, CEO,
Raleigh Regional Association of REALTORS®

REALTOR® associations such as Illinois, Greater Boston, and Wisconsin have produced and posted their own **online membership benefit videos** that are used not only to attract members and orient new members but also to promote membership value to existing members.

"When REALTORS® come to me and say they have **freedom of speech to say whatever they want online**, I say, 'Yes you do, but you don't have freedom from the consequences of what you say.'"

— Nobu Hata, director, industry outreach and engagement strategy, National Association of REALTORS®

The MetroTex Association of REALTORS® **distance-learning simulcast training initiative** broadcasts

more than 400 education programs a year from its central Dallas office to its five service center locations throughout the area with high-definition audio and video and unilateral communication among all six locations.

Paper ballots are relics at most associations, yet electronic voting participation is often very low. Try encouraging members to **vote for leadership and directors with a click on their mobile device** (bylaws permitting) with apps such as MyVote, Electionbuddy, and eBallot.

From understanding the relevance of Snapchat and Instagram to realizing the impact of Opendoor, Faira, and Haus, the **key to delivering technology education and information to members** comes down to understanding their needs and delivering relevance.

A multichannel approach to member engagement creates a more relevant and personalized member experience. Just imagine how impersonal a text message seems to a member who doesn't text, as will an invitation to join a Facebook group sent to a member who doesn't use Facebook. Use questionnaires and opt-in preferences to learn which channels will be most effective to reach and engage members.

Keep Your Fundraising Legal

Know the laws on how you can—and can't—solicit RPAC investments.

As we head into another campaign season and strive to increase RPAC participation and wisely use advocacy funds, keep these legal considerations in mind to ensure that your fundraising activities and solicitations do not run afoul of state or federal regulations.

RPAC Contribution Limits

Raising RPAC investments is doubly complicated for REALTOR® associations because AEs must follow state and federal campaign finance laws. Federal contribution limits allow individuals to invest no more than \$5,000 per year to the National Association of REALTORS® RPAC. State RPAC contribution limits vary from as low as \$500 per individual per year in Massachusetts to unlimited individual contributions in a small handful of states including Virginia.

Federal law—and some state laws—prohibit PACs from accepting contributions from corporations. For example, RE/MAX, as a corporation, cannot contribute to NAR's RPAC, but corporate executives, brokers, and agents who are REALTORS® can contribute as individuals. This means you can't accept any contributions to NAR's RPAC from corporations. Any corporate contributions received must be deposited in your state RPAC account only (if allowed in your state, such as Virginia). Remember, there is no longer a percentage of RPAC contributions that you must transfer to NAR.

Transmittal Timeline

Federal law requires associations to send RPAC funds they've raised to either their state association of REALTORS® or the National Association of REALTORS® within 10 days (or 30 days if that amount is less than \$50). NAR recommends that you for-



The The Central Carolina REALTORS® Association hosts an annual RPAC fundraising event. Remember, associations can only promote RPAC events to the solicitable class, which means promotions can only appear on members-only websites and private, members-only social media spaces.

ward all RPAC contributions received at the local association, such as those that come in with dues billing, to the state association at least once a week to meet these timelines. According to federal law, you must return all contributions that are not transmitted within the required time frame. No AE wants to return an otherwise valid RPAC investment to a well-intentioned investor with the explanation that he or she waited too long to send the contribution.

Solicitation Restrictions

Only those in the "solicitable class" may be asked to make RPAC contributions. The solicitable class includes members or REALTOR® association employees at the local, state, or national levels. This means only association members, including individual affiliate members of state and local associations, and the executive and administrative personnel of NAR, state, and local associations and boards, and their respective families, may be solicited to make RPAC contributions. Individuals not in the

solicitable class, regardless of their relationship with a state association or local board, cannot be solicited for RPAC investments. Be mindful of your RPAC communications to the general public, especially on social media. Social media RPAC communications may ask people to support RPAC's goals and initiatives, but they may not contain information about how a person may invest in RPAC, nor should such communications link to RPAC investment pages. Limit your public posts to informative RPAC content only, including highlighting RPAC achievements and describing ways in which RPAC benefits REALTORS®.

One-Third Rule Application

Paying for RPAC fundraising events and programs is another area AEs must carefully navigate. Federal law, and most state laws, permit associations to use general treasury money (i.e., dues) to pay for certain RPAC fundraising, thereby allowing associations to save more of their RPAC funds to use for advocacy. Associations can use their



Although, in many states, corporations can not contribute to RPAC, corporate affiliate members may pay for or sponsor RPAC fundraising events and not have such payments be considered contributions to RPAC.

treasury money to pay for RPAC event-related food, beverage, venue, and administrative costs. Notably, though, these expenses do not include entertainment or anything else intended to entice RPAC contributions, such as auction items, music, or party favors valued at more than \$20 each. These entertainment or enticement expenses must be paid for out of RPAC funds unless the association applies the “one-third rule.”

The one-third rule says the association may pay part of the entertainment and enticement costs from the its treasury as long as the amount paid is equal to or less than one-third of the total amount raised at the RPAC event. For example: Your association is hosting an RPAC event with three items for auction (a nice bottle of wine, a dinner at a local restaurant, and a salon visit) and pays a total of \$400 for all three items out of the association treasury. The auction raises \$1,200 for RPAC, which is three times the amount paid by the association. Therefore, the association does not need to use RPAC funds to reimburse the association treasury. Had the auction raised only \$900, then the associations could only fund \$300, of the auction items and the PAC would need to reimburse the association treasury for the difference, or \$100.

By following these rules, you can do your part in ensuring RPAC’s continued success.



Jonathan Waclawski is the political compliance counsel for the National Association of REALTORS®. Contact him at jwaclawski@realtors.org or 202-383-1248.

Soliciting RPAC Investments from Staff

Executive and administrative personnel of associations who are paid on a salary (rather than an hourly) basis and/or who have policymaking, managerial, professional, or supervisory responsibilities, may be solicited to invest in RPAC in the same manner as REALTORS®. However, association employees who are paid hourly and have no managerial, professional, or supervisory responsibilities may be solicited, but, according to federal law, only in a more limited manner to ensure that there is no explicit or indirect management pressure or coercion on them to contribute.

Non-executive and administrative

association employees may not be solicited for RPAC more than two times per year. They may be solicited only in writing and by mail addressed to their home addresses, and the association soliciting such employees must establish and offer to employees a custodial arrangement operated by a third party that allows such employees to make anonymous contributions. The association must also inform employees that their employer will not be advised of those who do not make contributions.

For more, read “Soliciting RPAC Investments from Staff” from REALTOR® AE Magazine, Spring 2013 at nar.realtor/RAE.



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Sharpen Your Governance IQ

NAR answers your questions on policy, bylaws, and procedures.

Q. I'm not sure what should be in my bylaws and what should be in policy. What is the difference between bylaws and policies?

An association's bylaws are a legal document. They are a set of basic operating rules adopted and maintained by an association to define and direct its internal structure, serve as a guide in conducting meetings, and enable the association to function and fulfill its mission. An association's bylaws should contain only what is required by state law and NAR policy. State law may require provisions on purpose, directors (number, election, term, qualifications, and removal), meetings (how often the directors will meet, special meetings, notice, and quorum), officers (titles, elections, terms, removal), and dissolution. It is important to review your state laws to verify that all provisions comply and that all components required by state law are included. NAR policy requires local association bylaws to contain provisions on membership, the Code of Ethics professional standards and training, the REALTOR® trademark, state and national membership, and dues.

Association policies, on the other hand, supplement the bylaws and are the operational guidelines for an association. The purpose of policies is to guide and protect the board of directors and the staff in fulfilling the mission of the association and allowing for consistent transaction of association business. Policies generally include financial guidelines such as budgeting; dues collection; financial information disclosure; travel; reserve levels; payment; compliance reporting; compensation; revenue recognition; asset capitalization; financial reporting; document retention and investing; board



of directors policies including harassment, conflict of interest, social media, and fiduciary duties; and employment policies. Association policies must never conflict with the bylaws, as the bylaws take precedence.

Q. A neighboring association is offering continuing education classes for free to its members but charging members who do not hold primary or secondary membership. Is this consistent with NAR policy?

Yes, this is consistent with the universal access to services component of the Board of Choice policy. Local and state associations determine what benefits to offer their members. Offering services for free or a reduced cost to members to compete for members with other associations is consistent with NAR policies. The universal access to services component of the Board of Choice policy requires only that REALTORS® be entitled to purchase services from boards other than their primary board without the necessity of holding membership in those boards. The fees charged for services to REALTORS® who do not hold membership locally are set by the individual association.

Q. What does "all REALTOR® association" mean?

"An all REALTOR® association" is an association of REALTORS® that provides brokers

and agents with only one class of active membership: REALTOR®. In other words, it does not offer a REALTOR Associate® class of membership for agents. Although some associations still have REALTOR Associate® members—a class of membership available to agents and salespersons affiliated with a REALTOR®—most associations are "All REALTOR® associations."

Being an "All REALTOR® association" does not mean your association can require all agents affiliated with a Designated REALTOR® to join your association. If an agent chooses not to hold REALTOR® membership, their Designated REALTOR®'s dues are increased to reflect a nonmember assessment. The Designated REALTOR® could then adopt a company policy that requires everyone affiliated with him or her to join NAR.

Agents who choose not to hold REALTOR® membership can still practice real estate with the Designated REALTOR®, but they cannot call themselves a REALTOR® or use the REALTOR® marks. The non-member agent can still access MLSs if their Designated REALTOR® is an MLS participant. Additionally, the Designated REALTOR® is liable under the NAR Code of Ethics for all actions of the nonmember. Therefore, if a nonmember affiliated with a Designated REALTOR® refuses to cooperate in violation of Article 3 of the Code of Ethics, for example, the Designated REALTOR® could be disciplined for the agent's actions.



Katherine Goldberg is the National Association of REALTORS®' director of member experience. Contact her at kgoldberg@realtors.org or 312-329-8355.

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Help Leaders Stay in Their Own Lane

Tips to guide volunteer presidents to lead, not overrun, your association.

I met with dozens of AEs in March during the AE Institute in Austin to offer human resources help, and I couldn't help but notice how often the talk turned to how to keep the board president in his or her own lane, so to speak. Board presidents often come to the job with an ideology of how the association should operate and a set of goals they hope to accomplish during their term. But sometimes, these goals clash with the objectives of the association executive.

Savvy AEs know they need to learn their leadership's agenda starting with the president-elect so they are well-prepared by the time a leader assumes the president's role. But leaders can be unpredictable, and it's never easy to negotiate a new relationship with someone who may not have a realistic understanding of their position.

When the president's agenda differs from that of the AE's—especially when presidents misunderstand the role and think they should manage the association's daily operations—there's no avoiding the situation. Putting your head down and waiting until next year is not an option. Act quickly to educate the president on real versus imagined association governance in a way that gets him or her on board and feeling empowered.

Commitment and buy-in to defined leadership roles begin with an intentional conversation, by which I mean the AE should

define the intent for the conversation. Is it to win or is it to gain commitment? When you approach the conversation with the intent of gaining commitment, your volunteer leader does not leave with the sense of being defeated.

Planning your conversation might start with the background of why you're having the conversation. A dialogue might start with: "As your presidency begins, it may make sense for us to review the roles and responsibilities we assume individually, as well as those we share. Doing this will help us have a great working relationship during your presidency."

As a guide for this conversation, look to NAR's "President and Chief Staff Executive Checklist." This tool can help you acknowledge the president's agenda and gain commitment to your own as you address the relevance of each item.

During this conversation, look to supporting association governance documents to supplement information and discussion. Depending on how these documents are drafted, roles may not be clearly spelled out. When this happens, look to other resources, such as your AE job contract or performance goals and the association strategic plan. Spending time early on in the president's term clarifying mutual expectations can go a long way toward a successful year.

Sometimes, no matter how hard you try, you may still end up with a president who wants to redefine his or her role. When that happens, decide how much slippage you want to allow. Does it make sense to address a single incident, or is it wiser to let it go unless there's another?

Here's a three-step strategy you can apply to any situation in which members or leaders are overstepping their role.

1. Address the situation in a conversation with the leader with the intent to change their behavior. Use your judgment as to whether the discussion should be private or if other parties need to be involved, although most people are more comfortable in a private discussion.
2. Explain and clarify roles and responsibilities of the AE, staff, and each member of the leadership team.
3. Use your governance documents (policy or bylaws) to back up your position and help your discussion.



Carole Kaptur is the director of strategic association management at the National Association of REALTORS®. Contact her at 312-329-8311 or ckaptur@realtors.org.



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A Fresh Vision of Management

Austin Board of REALTORS® CEO on the courage to drive change.

When Emily Chenevert was pursuing her undergraduate degree in government affairs at the University of Texas at Austin, not that long ago, she thought politics would be her career. She never envisioned that she'd be running a 13,000-member REALTOR® organization as its CEO before age 40.

"I didn't think this was the path that I was going to follow," she says, "but at each new opportunity, I found nuggets of what I liked about government affairs in other aspects of association work and was able to grow my passion for the REALTOR® organization."



Austin Board of REALTORS® CEO Emily Chenevert recording her new regular podcast, Scratch-That, focused on "peeling the layers back on national trends in real estate."

Chenevert joined the Austin Board of REALTORS® in 2012 as its director of government and community relations and moved through the ranks of chief operating officer and acting CEO before becoming CEO in 2018.

There is a rich tradition of association government affairs directors becoming CEOs because of their skills navigating politics outside and inside organizations. "There are practical realities to managing a board that require some political savvy, plus GADs work closely with members and intimately understand what members do, which makes us strong advocates for the industry in any role."

As CEO, Chenevert has expanded programs and launched major new initiatives that have attracted attention from her AE

peers and also her community.

The city of Austin recognized the Austin board as a Family Friendly Workplace in May due in part to its policies to invest in a balanced work-life environment for staff. This includes professional development opportunities and flexible scheduling.

To enable volunteers to get their work done more efficiently, Chenevert implemented the communication tool WorkSpace by Facebook and reorganized the association's governance structure. "We cut our committee structure in half, and we found new opportunities for direct member involvement and engagement in the association," she says. Previously, decision-making was often mired in process: An initiative would go to a task force, then to a committee, and then the board of directors, but then it might have been sent back to the committee. It could take months before they could proceed on an initiative, she says. "Under our new governance structure, we've found that we're much nimbler and more responsive, and we've diversified the voices we're hearing from."

As an example, Austin's global committee, which developed program ideas to submit to the board as motions, transitioned into a council that operates independently of and alongside staff so that Chenevert has the authority to implement programming without going to the board first. "This structure gave the global council members more control over developing programs to meet their needs, which may not happen if everything has to be approved by board members who may not be well-versed in international transactions."

Another major restructuring still underway at the association is the divorce of the MLS and the association.

"Despite the fact that I run both the association and the MLS, I recognize the differ-

ence between them, and I think it's imperative for associations to determine what their independent value proposition is to our membership apart from the MLS," says Chenevert. "And that can be scary for associations that wholly own their MLSs like we do, because the MLS is our greatest asset and often the driver for connecting with members. But I think we have to separate those entities and manage them more deliberately and independently so that each one can be successful." The Austin board and its MLS recently adopted separate strategic plans, mission statements, and financials.

"There's no doubt about whether a REALTOR® association can have value without the MLS, but there's fear that, if truly independent, is there enough meat on the bone to still attract members to engage fully? And even I have to wonder that at times, but my job is to ensure that there is enough inherent value in what we offers so that members still want to be connected to us."

Chenevert turns to a network of AE peers and attends a range of industry conferences, including Inman, T3, and CMLS, to find innovative member programs, products, and services. "On any given day a trend might be starting in Austin or coming to Austin next, so if I have a raised awareness of what's happening, especially in other large urban markets, it's good for my membership. Conferences that are more industry-focused enable me to participate and learn, rather than facilitate my members' experience at a conference, like AEs typically do at NAR meetings."

Chenevert says she deeply respects the experience of her tenured colleagues and their willingness to share, but acknowledges that not having 20 years as an AE gives her the "freedom to try new things" and the courage to drive change.

—Carolyn Schwaar

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