

SPRING 2023

# AEXPERIENCE

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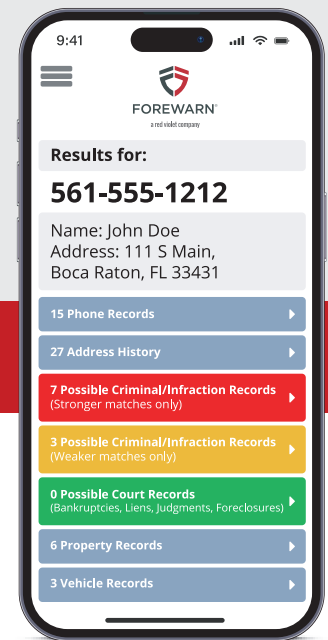
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# AEXPERIENCE

AExperience, powered by REALTOR® Magazine, covers activities, programs, best practices, trends and ideas in REALTOR® association management.

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PUBLICATION

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## ON THE WEB

Ever wished for a template to create a form or policy?

NAR's REALTOR® Association Resource Exchange gives AEs the opportunity to both access and share sample director and officer application forms, association policy manuals and other knowledge. RARE is a fantastic resource for AEs, featuring materials submitted and vetted by your peers. Login to see more.





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## That Pivotal Moment

**D**eliberate choices and a disciplined lifestyle don't always guarantee complete control. Sometimes, life takes over.

In the summer of 2021, I was diagnosed with breast cancer, and it literally turned my world upside down. I remember thinking, "How could this be? I'm young and healthy." At that pivotal moment—one of the most serious of my life—I had to prioritize my personal health and wellness over everything else for the first time in my career.

For the next six to eight months, navigating all my oncology appointments, major surgeries, treatments, family and association responsibilities *was* a challenge. But with the support of my family, friends and amazing staff, I completed all my treatments successfully. I also started a consistent weekly routine, which includes healthier eating habits, more exercise and transparent communication with my association leadership and staff. As of Feb. 1, I've been cancer-free for one year!

Whether or not you are dealing with a specific health crisis, your health and how you maintain it directly impacts how you perform. When you are an executive of a

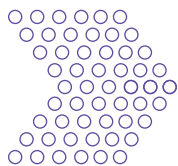


Jessica Coates, RCE, is CEO of the Sacramento Association of REALTORS® and 2023 AEC chair.

REALTOR® association, making your health a priority may require a time commitment that can infringe upon your work life and your personal life. Thankfully, most work cultures today embrace the concept of work-life balance as an essential part of great leadership. These five simple strategies will help you maintain balance:

1. Define what balance means to you.
2. Get creative with your time.
3. Participate in leisure activities that bring you joy and improve your performance.
4. Stand firm in taking time for yourself.
5. Learn from your work-life balance mistakes.

Remember, you're only as strong as your team. So, model this for your staff, too. For me, that has included increasing our staff development days to four a year. We learn a little, laugh a lot and get to refuel for whatever life brings us next.



## LEADERSHIP

### Want to Be a Mentor or a Mentee?

**NAR can help scratch that itch.**

Maybe you've never been an association executive before. Or maybe you're an AE with a tough challenge and you'd love to talk through it with someone who's been there. Then again, maybe you've done it all and want to share your wisdom.

The AE Mentor Program is here to connect AEs with one another for help with association management and career development. The program is open to all local and state REALTOR® association staff, including MLS chief executives and staff specialists. Start by completing your mentor/mentee profile today. The National Association of REALTORS® will then match you with the right mentor/mentee based on your location, demographics and skill set.

[nar.realtor/ae/ae-mentor-program](https://nar.realtor/ae/ae-mentor-program)



#### MENTOR

"As someone who has been in this field for many years, serving as a mentor has provided me with new perspectives and fresh ideas, it's helped me become a better leader and has provided me with the opportunity for long-lasting friendships! Lastly, as someone who has significantly benefited from this industry and people who have mentored me, this is an excellent way for me to pay it forward."

—Dan Sale, RCE, CAE, CEO, St. Louis REALTORS®



#### MENTEE

"As I began to work toward receiving my RCE, the mentor program was an option to gain points. I quickly found that the relationship I built with my mentor was one of the most valuable parts

of the program. Just like many things in life, reading something out of a textbook doesn't always translate directly to the real world. Dan's firsthand experience was priceless. After five years, he and I make time to meet up at conferences and catch up. I know that I can still call him for anything! Being an AE is not for the weak of heart! Having peers to help and encourage you is insanely valuable. I hope to pay it forward with newer individuals in the business as well."

—Jamie Johnson, RCE, CEO, Park City Board of REALTORS®, Utah

## \$3,000 to \$7,500

These are the new funding levels possible for National Association of REALTORS® Placemaking Grants. New guidelines also make it easier for more projects to qualify. Grantees can now add updates to existing sites or rehab an eyesore into a new gathering space, such as a park or community garden.

State and local REALTOR® association staff can apply for a Level 1 or Level 2 Placemaking Grant at [realtorparty.realtor/placemaking](https://realtorparty.realtor/placemaking). For questions, email [placemakinggrants@nar.realtor](mailto:placemakinggrants@nar.realtor) or Catherine Mesick at [cmesick@nar.realtor](mailto:cmesick@nar.realtor).



# REALTOR® VOLUNTEER DAYS JUNE 3-11

**THERE'S NO BETTER TIME TO  
MAKE YOUR MARK ON YOUR COMMUNITY!**

Choose a good cause, then plan a volunteer activity and rally your members to participate by using the marketing materials in the promotional toolkit.

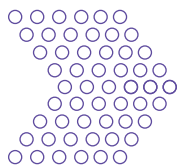
**JOIN US FOR A WEEK OF GIVING BACK!**

See full details and access the toolkit at [nar.realtor/rgn/volunteer-days](https://nar.realtor/rgn/volunteer-days)



# AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS



## THE BRAND

### Get on the Bus

All this year, REALTOR® associations are inspiring members by Riding with the Brand.

REALTOR® blue looked great in Philadelphia when Kenny Parcell, National Association of REALTORS® president, took the stage at the REALTOR® Party Training Conference, the launch for NAR's 2023 Riding with the Brand tour across all 50 states.

Each stop is different, but one thing is the same: the power of REALTORS® meeting with state and national leadership share stories about the value REALTORS® bring to their clients and communities. Whether the big blue motorcoach is part of your state's event or not, you can generate excitement around the opportunity to connect your members with NAR leaders. Here's how some of the early events incorporated Riding with the Brand.

**New York State Association of REALTORS®, New Jersey REALTORS® and Pennsylvania Association of REALTORS® brought it to their Triple Play REALTOR® Convention & Trade Expo.** Member photo ops included two custom bus cutouts, and the Riding with the Brand logo was everywhere—on lanyards, cellphone charging stations, social media, the conference program, floor decals and more.

**Arizona REALTORS® welcomed NAR President Kenny Parcell to their Arizona REALTOR® Day at Chase Field in Phoenix,** which combined real estate, political advocacy and Riding with the Brand.

**Wyoming REALTORS® drew REALTORS® from across the state, despite snowy conditions, to an event connected with the association's annual legislative meetings.** The event gave members a chance to meet with industry leaders, including Tracy Kasper, NAR president-elect, as well as legislators and community leaders. The small association also lived out the words "REALTOR® Strong," raising more than \$20,000 for RPAC during the event.

As Riding with the Brand moves through the country, state associations are finding fun ways to hand it off to



From left, New Jersey REALTORS® President Nick Manis and CEO Jarrod Grasso joined members and NAR President Kenny Parcell (fifth from left) for a Riding with the Brand photo opp.

Whether the big blue motorcoach is part of your state's event or not, you can generate excitement around the opportunity to connect your members with NAR leaders.

their peers. After its Jan. 23 event, Wyoming REALTORS® sent a set of spurs to South Carolina REALTORS®, which hosted a Feb. 2 event in conjunction with its annual Capitol Conference & Leadership Training. At the end of the South Carolina event, state association President Rob Woodul symbolically passed the torch to the Colorado Association of REALTORS® for its Feb. 8-9 event by tossing a football into the stands of Williams-Brice Stadium in downtown Columbia, S.C.

📅 See the full Riding with the Brand schedule at [nar.realtor/riding](http://nar.realtor/riding). Read how other states are bringing Riding with the Brand to life at [nar.realtor/magazine/national-road-trip](http://nar.realtor/magazine/national-road-trip).



## GOOD TO KNOW

### 'It's REALTOR®'

Do you grind your teeth every time someone mispronounces the word "REALTOR®"? It feels even worse if it happens at an industry presentation or during a conversation with a new member. That's why educating new agents, presenters and others is a part of basic training for many associations.

"We always remind [presenters] of multiple things, including that AEs are not REALTORS® and how to say 'REAL-TOR®,'" says Jim Haisler, RCE, CIPS, CEO at Heartland REALTOR® Organization in Illinois, a past dean of the AE Institute. "Often they are reminded immediately before they take the stage as well. Personally, I can overlook it when someone outside the industry [says] it wrong, but when the person should already know better, it is disappointing."

At new member orientations, Haisler spends a couple minutes explaining what the word REALTOR® means and how it's pronounced. He also points out how many people, including REALTORS®, mispronounce the word.

"I usually end the conversation by telling them, 'Look, I don't care if you say it wrong. However, I practically guarantee you that someone will correct you, and they may not be so nice about it,'" says Haisler.

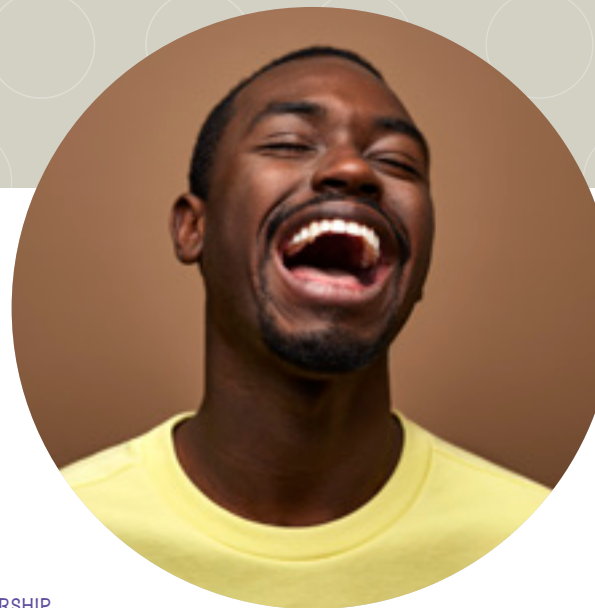
Charay Palmer, RCE, association executive at the Egyptian Board of REALTORS® in Illinois and a former broker-owner, says her elevator speech to new members includes a tutorial on how to say REALTOR®. She tries to cover these six points, which happen to be good guidance for any association:

- 1** Wear the REALTOR® pin with pride. Be ready to tell others what it means.
- 2** Educate yourself about your new career and stay informed on the industry and current market trends.
- 3** You are a professional now. Act like it at all times.
- 4** Put your clients first. The rewards will go further than a paycheck. You will make a difference in the lives of others.
- 5** Live by the golden rule and the Code of Ethics.
- 6** Say "REALTOR®" correctly. It has two syllables and only two: REAL-TOR®, like vic-tor, doc-tor or men-tor.

"Do these things," Palmer adds, "and we'll all be proud to have you as part of the REALTOR® family."



**REALTOR®**  
REEL - tər



## LEADERSHIP

### Laugh More

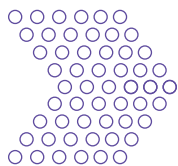
Having a good sense of humor can enhance your career, allows you to stand out and be memorable, makes you appear more approachable and can help increase productivity, says Alison Gilmore, director of the Emory University's Goizueta Business School Doctoral Program. But humor isn't just about making jokes, she adds. During a recent AEI Year-Round online event, she offered this advice on how to add humor to the workplace, even if it doesn't come naturally to you:

- Have a sense of balance and look for the funny in everyday life.
- Show up, be present and listen to those around you.
- Create safe moments where everyone can participate. Meetings can be the perfect place to begin. For example, start a meeting by asking everyone to share what they're grateful for or what they did during the weekend. There's sure to be at least one funny response.

Shared team experiences give everyone a shared history, Gilmore says, and can be a powerful bonding tool.

[nar.realtor/aei-year-round-virtual-sessions](https://nar.realtor/aei-year-round-virtual-sessions)





ADVOCACY

## Issues Mobilization Grant Helps Win Against Rent Control

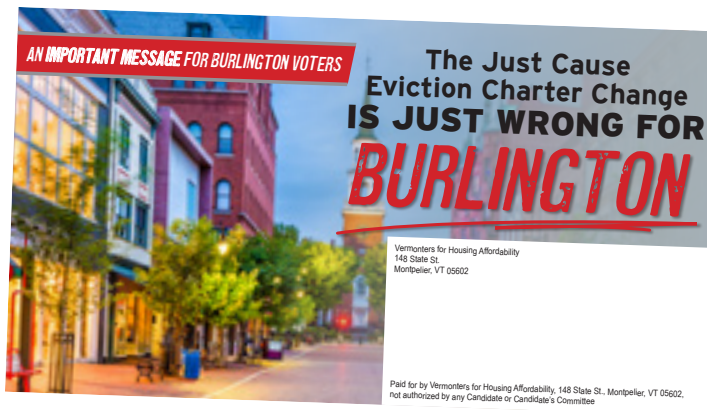
In Vermont, the city of Burlington is dominated by tenants, who lease 65% of the housing market. So, when a “just cause” rent control ordinance was proposed to help solve the challenge of affordable housing, Peter Tucker, Vermont Association of REALTORS® director of advocacy and public policy, knew fighting it would be an uphill battle—but one that was worthwhile for VAR to take on.

For VAR, the heart of the issue was the private property rights of housing providers to use and rent their properties as they see fit. REALTORS® have long argued that rent control has a net negative effect on rental housing supply. “In fact,” says Tucker, “it will only push landlords who can’t afford the rising cost of doing business to



I was brand new to the job, but I called the REALTOR® Party team and they were fantastic: The program is great, the delivery was there, and they gave me the advocacy research we needed to say, ‘Here’s what we think and why.’

—Peter Tucker, director of advocacy and public policy, Vermont Association of REALTORS®



VERMONT ASSOCIATION OF REALTORS®

sell out, converting their apartments to condos”—and reducing the total number of available rentals.

Through an Issues Mobilization Grant from the REALTOR® Party, VAR launched a multifaceted campaign.

**At the local level:** A series of mailings, digital advertising and live calls targeted voters, explaining why the big-city rent-control policies weren’t a good fit for the small state.

**At the state level:** When the ordinance passed locally and went to the state legislature for approval, advocacy efforts highlighted cities like San Francisco and St. Paul, Minn., which experienced severe rental attrition and building permit drop-off in the wake of increasing rent control regulations.

**Additional outreach:** When it passed again, Gov. Phil Scott, who agreed with the REALTOR® position, exercised veto power. The campaign then continued outreach to representatives as the veto-proof majority prepared for an override.

The veto was upheld by a single vote. For Tucker, who got the rent-control proposal on his desk only a month after he joined association staff, “it was a case of losing some battles but winning the war.”

MARKETING

## Signing Off

Your email signature is prime real estate where you and your members can feature an industry-related commemoration or promote upcoming events. The National Association of REALTORS® rotates its email signatures each month. Coming up:

- **May:** Asian American and Pacific Islander Heritage Month
- **June:** Homeownership Month
- **July:** iOi Summit



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PARTY ON

## Salt Lake Board of REALTORS® Rocks

Association ends its year on a high note.

"I'm just a REALTOR®, I need no social life .... Any way the deal goes, doesn't really matter to me, to me," Rob Ockey, 2023 president of the Salt Lake Board of REALTORS®, croons to the tune of Queen's "Bohemian Rhapsody," in a parody video that's now the fourth produced by the association.

It started as a fun way to feature local leadership and REALTORS® during the association's annual holiday social event. Now, it's gone viral: In two months, there were more than 19,000 views for the association's REALTOR® Rhapsody video.

**Past parodies:** Adele's "Hello," Michael Jackson's "Thriller," Aretha Franklin's "I Say a Little Prayer"

**Work begins:** As early as July or August. Association staff identify a song, change the lyrics and develop a storyline. The videos introduce the incoming president, so the association looks for ways to highlight that person and current issues/conditions in the real estate profession in a humorous way.

**Cast:** About 20 to 30 REALTORS® and affiliates

**Time and cost:** Filming is done in one day (10 to 12 hours), with each script including 12 to 14 scenes. Cost is about \$6,000 to \$8,000.

Making a viral video starts with being open to ideas, using your imagination, collaborating as a team and casting the right people, says Dave Anderton, the association's communications director. "The video needs to be interesting and entertaining," he adds. "Look for personalities that shine and look for talent among members in your association. Start with a good idea, then build on it."

 [youtube.com/watch?v=FXfijwQBAKM](https://www.youtube.com/watch?v=FXfijwQBAKM)



SALT LAKE CITY BOARD OF REALTORS®

**"Humor is captivating. It makes people feel good. And the videos have created a sense of camaraderie for our members!"**

—Dave Anderton, communications director,  
Salt Lake Board of REALTORS®

## What should be included in a memorandum of understanding between a local REALTOR® association and local chapters of multicultural organizations?



According to Michele Xiong, director of diversity and inclusion at Raleigh Regional

Association of REALTORS®, both sides want more than just a performative agreement. They truly want support, and neither side wants to be taken advantage of, says Xiong, who served with the 2022 AE diversity workgroup and its MCO sub-workgroup. MOUs help

establish guidelines. An initial conversation on what each group expects and what is currently feasible saves time in drafting the MOU.

Also, each association and chapter differ greatly, so what should be included varies from one to the other. Examples can include meeting space, event and chapter promotion, magazine or newsletter articles and updates, inclusion in new member orientation, or special events to engage with association leadership.

## What are keys to success in forging partnerships with multicultural organizations?

There should always be a designated staff liaison at the association whom local MCO chapters can reach out to if they have any requests, concerns or questions, says Xiong. The Raleigh associa-

tion also makes sure the other organizations are invited to and welcome at all its DEI committee meetings. Simply put, make sure MCOs know and feel that they have a voice at the association.

## What else helps these partnerships succeed?

Open communication and knowing what's going on, says Xiong. It also helps to have members involved in both your association's DEI committee and local multicultural organizations; they can relay updates and opportunities for partnerships.

REALTORS® who are DEI leaders at RRAR have an annual meeting at the start of each year with leadership of partner organizations to ensure a current understanding of the organization's vision and to spark conversations that can lead to change.



# How's Your Work/Life Balance?

If you're not prioritizing self-care and self-compassion, now is the time to start.

BY ROSIE WOLF WILLIAMS

**A**fter he moved from Queens, N.Y., to Olympia, Wash., Steve Francks discovered backpacking. Long days on the trail allowed him to take in the beauty of the moment.

"If I think about work, it's not about details and little things," says Francks, RCE, CAE, CEO of Washington REALTORS®. "It's about big-picture stuff. Being able to decompress like that lets me come off the trail with greater energy and enthusiasm for my job. I first experienced that in a big way when I hiked the Wonderland Trail, a nine-day, 93-mile trip around the base of Mount Rainier that is physically demanding and incredibly beautiful. I was so recharged that I made backpacking a priority every summer."

According to the American Institute of Stress, 76% of American workers say their work-related stress has caused tension in their personal lives. Francks found a healthy way to destress and reconnect with loved ones. "My wife is an avid and strong backpacker, and we've done a lot of great trips together," he says.

Hiking plays a part in Cindy Butts' well-being, too, and she often incorporates her love of the outdoors when traveling for work. "The Code of Ethics includes the beautiful preamble, 'Under all is the land,'" says Butts, RCE, CAE, CEO of Connecticut REALTORS® in East Hartford, Conn. She began by hiking Connecticut's 52-mile stretch of the 2,190-mile Appalachian Trail, and then she was hooked. "I hiked parts of the Shenandoah National Park section over a series of years when traveling to D.C. for the REALTORS® Legislative Meetings, and parts of the Georgia section when traveling to Atlanta for the AE Institute," she says. "When hiking, I'm so mindful of—and connected to—the gifts of clean air, clean water, natural resources and green space. Those don't leave my head or heart as I work on real estate legislative and regulatory issues."

Both Francks and Butts have managed workplace stress by practicing self-care through outdoor activities, but they might be in the minority. Many people do not recognize when they are nearing burnout or experiencing too-high stress.



NEW YORK STATE ASSOCIATION OF REALTORS®



Just like in golf, workplace mistakes that aren't reckless or intentional are learning experiences. I always give my staff another shot.

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

“There has been [extensive research] on people who are in the helping professions,” says Amelia Roeschlein, a consultant at the National Council for Mental Wellbeing in Washington, D.C. That includes both association executives and their members. “If your job is dealing with people, and you're good at it, often you have a high amount of empathy for others. The problem is that you may tend to be incredibly self-critical.”

### Finding a Passion is Self-Compassion

Roeschlein suggests that leaders should observe how they are treating themselves during stressful times, pointing out that executives often push themselves to produce more and to accomplish more.

“What we find is that people who are kinder to themselves during hard times tend to fare much better,” she says. “Have a practice of well-being where you ask yourself, ‘Am I overwhelmed? How full is my cup?’ Even when it is full, you need to take care of yourself.”

One helpful tool that Roeschlein points executives to is an online quiz called The Self-Compassion Test, at [self-compassion.org](http://self-compassion.org), that can help you measure how

self-compassionate you are and offers practices to help you balance and decompress.

Francks says that he realized backpacking was positively affecting his work when he started coming off the trail with new creative ideas. “I'm convinced that we have lots of information and challenges overwhelming our brains every day, but we rarely have time to just sit and contemplate answers or strategies,” he says. “I find that getting away to the wilderness for days, or even a day hike, with no cell service, lets me forget about the daily stressful details of the job and lets crazy ideas pop into my head and percolate. Some of my best ideas have come to me on the trail with a sudden sense of clarity, as though they rose out of my subconscious.”

### Beginning to Balance

Executives need to remind themselves that their own personal well-being is at least as important as the work. “There is overwhelming data on how harmful overworking is to a person's mental and physical health, and how it can make you less productive and more error prone,” says Francks. “A stressed-out leader who can't find time for themselves or their family is not doing themselves or the association any favors—and is not setting a good example for the members.”

“I am a work in progress,” admits Duncan MacKenzie, RCE, CEO of New York State Association of REALTORS® in Albany. Golf, a sport he began playing as a kid with his dad, can bring comfort and a sense of perspective about challenges in the office. “Just like in golf, workplace mistakes that aren't reckless or intentional are learning experiences,” he says. “I always give my staff another shot.”



Left: During a state CEO annual retreat, Duncan MacKenzie, New York State Association of REALTORS®, golfed with fellow AEs, all part of a close-knit group that regularly collaborates. Pictured from left are Nick Kremydas, Rob Campau, Jarrod Grasso, MacKenzie, Scott Reiter and Gavin Blair. Center: Steve Francks, Washington REALTORS®, is an avid backpacker. Right: Cindy Butts, Connecticut REALTORS®, often includes a hike during her travel time to conferences.

The COVID-19 pandemic drove home the importance of the sport to MacKenzie’s mental well-being. When golf courses were approved for use after New York state’s order to isolate, MacKenzie was on a course on opening day. “After that round and a small return to normalcy, I had a sense that I was going to get through everything without losing my mind.”

Genevieve Hawkins, executive leader and author of *Mentally at Work*, reminds leaders that what works for one person won’t work for everyone. She points out that there are four important aspects of decompressing:

- **Physical**—Exercise or enjoy a sport, even simply walking the dog or taking a brisk walk around the block, if time is limited.
- **Emotional**—Laughter is the best medicine in this category and can be found by spending time with a friend, watching comedy shows or reading a humorous book.
- **Mental**—Focus on projects or events outside of work, journaling, playing cards or gardening.
- **Spiritual**—Connect to something greater than ourselves. This can include nature-based activities such as forest bathing, the Japanese practice of immersing oneself in a tree-filled space; listening to mood-shifting music; or practicing mindfulness or meditation.

### Love Yourself More than Work

Many activities can touch more than one of these four categories and help an executive decompress. “There can be a risk, when we love our work, that we get lost in it,” says Hawkins. “You need others around you who can call you on it. You want friends who can appreciate the energy that work might bring but also hold you to account for spending time with them.”

“You often hear among the CEO crowd that our work is our hobby. The reality of it is that this job is stressful,” admits Andrea Bushnell, RCE, CEO of North Carolina Association of REALTORS®. “We have times when things are just insanely busy, and it is stressful when you can’t ever see the end of your to-do list. You’ll have days where you look at your list and you have not done one thing. But you write down six things just so you can check them off so that you feel accomplished.”

Bushnell took up tennis to decompress from work and heal from hip problems that had left her relatively immobile, leading to a hip replacement. “I was having a glass or two of wine while my husband was out playing tennis and being healthy,” she says. “[Then] I was sitting at my desk one day, and I was thinking, ‘If somebody were chasing me, could I run away from them?’ I decided that I was going to take up tennis. It’s freeing, almost a relief.”

### Pace Yourself

For hikers, a common expression is “Hike your own hike.” “[That] applies to work, too,” says Butts. “Many association executives start to feel burnout the first year on the job, and they need to embrace that they are hiking their own hike—not their predecessors’ and not the hike of other association executives.

“We each need to pace ourselves, figure out how to breathe, take a break when it is needed, prepare for problems and set our own victories.” ●

*Rosie Wolf Williams is a writer whose work has appeared in USA Weekend, Woman’s Day, AARP the Magazine and elsewhere.*

**HAPPY TO**

**WORK**

IT'S A FACT: WHEN YOUR ASSOCIATION CULTURE IS BUILT ON MAKING WELL-BEING A PRIORITY, SUPPORTING PHYSICAL HEALTH AND MODELING A GOOD WORK-LIFE BALANCE, YOUR STAFF THRIVES—AND YOUR MEMBERS WILL, TOO.

**BY M. DIANE MCCORMICK**





**A**t Maryland's Howard County Association of REALTORS®, CEO Sarah Rayne, RCE, CAE, is firm about this: "Work is not your whole life dynamic."

"Everybody has a family. Everybody has individual needs," she says. "We spend 40-plus hours a week together. It needs to be a healthy, enjoyable experience. Is it hard sometimes? Yes, absolutely, but I like to believe, or I hope, that people know that when it's hard, they can come to me, and we will figure it out together."

The association executive who is attuned to staff wellness has a leg up in serving employees and, in return, gaining their full energy and capabilities during the workday. Each association crafts an approach that suits its staff needs, but the common denominators for success are genuine concern for well-being, encouraging physical activity for stress relief and health, and leading a wellness culture by example.

### When Well-Being Comes First

Rayne has a one-on-one check-in with staff members every month. With six full-time people including herself, she knows that frequency is a luxury other AEs might lack, but regular check-ins are essential to establishing connections and making sure workloads are properly balanced. Recently, one staff member suggested that an assignment was outside her wheelhouse, and Rayne realized she was right.

"I want them to be comfortable enough to tell me that this is too much, and if it is too much, then that's OK," says Rayne. "It is really important to demonstrate empathy and make sure your staff feel seen and understood."

New Jersey REALTORS® CEO Jarrod Grasso, RCE, finds daily opportunities for quick check-ins, perhaps asking a team member how she, her family and her department are doing when they see each other in the office gym. With a staff of 19 spread over two stories, he will sometimes take his laptop to the second-floor kitchen, where team members know they can find him for a chat.

"I love to hear about their families and what's going on outside of the work environment," says Grasso. "I truly care. I believe that my team members are an extended part of my family. If there's something I can do to help them, of course, I'm going to help."

Flexibility is another benefit that can pay big wellness dividends. Working with his leadership team, Grasso created a post-pandemic hybrid work schedule—Fridays and a choice of Tuesdays or Wednesdays to work from home—that offers a dual contribution to work-life balance: It eases the pressure on managing family duties while also expressing Grasso's trust in the team's abilities and integrity. "It shows that I believe in them and that they're going to be still doing their jobs while they're working at home," he says.

At New York State Association of REALTORS® in Albany, CEO Duncan MacKenzie, RCE, says his directors are "present in the lives of their staff, and we always say yes to a request to leave early or take a long lunch." The team also celebrates real holidays, made-up holidays, and every group or individual accomplishment.

Also important is building the right culture, one that avoids blame and injects a little humor. Rayne encourages a team ethos by apologizing for any missteps in a way that spotlights her ultimate responsibility for the entire team. She leads a no-blame culture, where even saying, "It wasn't me," is not an acceptable reaction to any errors. "I don't tolerate anyone blaming anybody for anything," she says. "We are a team. I'm not looking for whose fault it was."

Rayne opens HCAR staff meetings with uplifting ice breakers. In addition, the annual staff day includes training spiced with fun, such as a recent scavenger hunt that sent staff teams scurrying to another building to find a word on a floor mat. "It's important that you recognize them for their efforts and provide opportunities to bond and be a little silly," she says.

### The Mind-Body Connection

In one of life's vicious circles, stress contributes to ill health, and ill health contributes to stress. Physical activity can help, but many people lack time in the mornings and energy in the evenings to tackle full-blown workouts, especially when they have family responsibilities.

That's when the workplace can offer opportunities to get some activity and maybe soak up some sunshine.

Grasso and his team stumbled on a partial solution by chance. While building the headquarters they've occupied since 2016, they were temporarily housed in an office park surrounded by "a ginormous parking lot," he says. One day, Grasso told others in the office that he planned on bringing his running gear the next day. A couple of team members joined in, and a culture of shared wellness was born.

Today, Grasso continues to encourage use of the association's wellness amenities. Team members will send Slack messages soliciting walk-run buddies. Another group recently started yoga sessions in the office gym.

At Arizona's West and SouthEast REALTORS® of the Valley, Vice President of Member Services Tonya Deskins, RCE, shares her love for yoga with her teammates. She and her husband, a mortgage lender, find relief from their pressure-filled days by attending yoga classes four or five times a week. Plus, following a tip from a staff member of the Austin Board of REALTORS®, she starts every day with a few sun salutation exercises.

"It's been a way to start the day off, which helps put you in a better mind frame to get the day going," says Deskins. "You can't participate and hold the poses if you can't have a clear mind, which is part of the practice—learning to let go of those problems that are circling around."

Deskins regularly shares yoga stress-relief techniques with colleagues. For example, laying your forehead on a desk—gently, of course—puts pressure on the frontal lobe, releasing endorphins that help calm the body and release negative energy. A forward fold—a stretch where you fold your upper body over your legs—can also relieve stress. Conversations with staff and, occasionally, members aren't built on suggestions as much as on "sharing the love of the practice and sharing how calming it is," Deskins says.

HCAR's Rayne is one of several staff members who leave the office and walk around the building once or twice a day. She invites staff to follow her lead or to use the empty board room as space to stretch out achy backs and muscles.

The HCAR team's physical wellness also gets a boost from policy. Staff can leave work for a certain number of doctor visits yearly—without using PTO. Rayne discourages staff members from “having to drag themselves in” when they don't feel well. Together, they might devise a work-from-home plan, if needed.

And if someone just feels grumpy once in a while, there's leeway for that, too, because that's how humans release stress. “I definitely support the staff in anything they want to do to take care of themselves,” says Rayne.

### Leading By Example

Using every bit of allotted time off is essential to achieving work-life balance for MacKenzie and his staff. Equally important is allowing staff to occasionally take long lunches or leave the office early for personal reasons. “These small investments of time pay huge dividends in staff morale,” he says. “To my colleagues, I would suggest that you assume that you and your staff do not currently have the best possible work-life balance. There is always another step forward to be taken.”

AEs can also lead by example through transparency about their own challenges



Doug Tomson, vice president of government affairs; Mary Pilaar, director of membership outreach; and Jarrod Grasso, CEO, of New Jersey REALTORS® ran together in the REALTORS® Relief Foundation's 5K run held on Boston in 2018.



At the height of the pandemic, Howard County Association of REALTORS® annual staff day included activities such as instructor-led succulent planting.

and obstacles. Rayne doesn't walk around the office shouting that she is in therapy, but she makes no secret about her sessions. “You have to be mindfully vulnerable—showing them that it is OK to need therapy, showing them that the whole ‘strong CEO, no faults, perfect persona’ is not real,” she says. “It's OK to not be OK.”

Rayne derives so much benefit from self-care and professional development books—she says Mel Robbins' *The 5 Second Rule* and Jen Sincero's *You Are a Badass* are life changers—that she established a little staff library in her office. A new favorite of Rayne's is Brené Brown's *Dare to Lead*, for its guidance on communicating and expressing empathy.

Executives should also set the stage for others by being transparent about their own commitment to work-life balance, says North Carolina Association of REALTORS® CEO Andrea Bushnell, RCE. The avid tennis player takes off days for tournaments and puts her games on her calendar for all to see, “so it gives them permission to be able to do things that are important to them, also.”

Bushnell adds, “I think it is important for a manager, a boss, to set an example that a work-life balance is important.”

### All In It Together

Employees who care about one another and work well together are better able to deliver on the association's value proposition.

“We're realizing for the long haul, we have to come up with some kind of ritual around this and normalize that it is healthy, that this is what longevity and sustainability look like,” says

“I THINK IT IS IMPORTANT FOR A MANAGER, A BOSS, TO SET AN EXAMPLE THAT A WORK-LIFE BALANCE IS IMPORTANT.”

— ANDREA BUSHNELL, NORTH CAROLINA ASSOCIATION OF REALTORS®

Amelia Roeschlein, a consultant at the National Council for Mental Wellbeing, in Washington, D.C. “Whether you work by yourself or not, having a team or having others who do similar work call you out and ask, ‘How are you doing? What do you need?’ Like it or not, we need each other, and one of the most potent ways to feel better is to lean into someone else.”

Then, when staff feel connected and supported, that feeds into great member care. “It's important to me that when somebody walks in the door, they are warmly greeted, and I'm not looking for it to be fake. I want our staff to be happy to be here,” says Raynes.

Grasso agrees: “The opportunity to take that mental break during the day, to kind of recharge and recenter and then go back to work—that helps staff provide a high-level service to the membership.” ●

M. Diane McCormick is a Pennsylvania-based freelance writer and author.



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Four cardboard blocks, each with a dark teal checkmark on its top surface, are arranged in a vertical line on the left side of the page. The blocks are slightly offset and cast soft shadows on the blue background.

It's Time for Your

# Check

NAR's Organization Assessment Checklist helps AEs evaluate the wellness of their associations.

BY ERIC JOHNSON

**G**ood health, whether personal or organizational, doesn't just happen. It requires adopting positive behaviors, eliminating negative influences and occasionally assessing where you stand in relation to your wellness goals. Just as physicians examine different aspects of your personal health, audits evaluate your organizational well-being by identifying harmful problems early on and encouraging behaviors that can strengthen your association.

# checkup

“We have a financial audit every year and a kind of 30,000-foot audit with the Core Standards, but when I started at my role—three days before we shut the office down for COVID-19—we didn’t have an operational audit,” says Jeff Lasky, RCE, CEO of the North Shore-Barrington Association of REALTORS® in Illinois. “I came across the Organization Assessment Checklist on the NAR website and thought, ‘Wow—this is a really neat opportunity for us to check all the boxes.’”

## Operational Insurance

The Organization Assessment Checklist is a downloadable resource provided by the National Association of REALTORS® that’s designed to help associations assess their processes, procedures and management functions.

“It’s kind of like operational insurance,” Lasky says. “By using it, I’ve really reduced the chances of anything slipping through the cracks.”

The checklist can be useful in a variety of circumstances, from managing crises to guiding future decisions. For Cara Budde, CEO of the West Central Association of REALTORS® in Lima, Ohio, it’s a guidebook for the job.

“When I got here two years ago, there was nothing in writing for my position,” she says. “So, I was able to get together with my leadership, and we were able to work through the checklist. Even if I looked at it and had no idea what something was, I could dig in and ask questions.”

Completing the assessment with her leadership helped Budde cement those all-important relationships. It also provided her an opportunity to define items like committee chair explanations and update policies that hadn’t been looked at for a long time.

For example, the personnel policy had been unchanged for two decades; the assessment gave the association an opportunity to make significant updates to the harassment policy and create policies for activities like social media that didn’t exist 20 years ago.

“I was able to look at [the assessment] and take policy updates and additions step by step,” she says. “It’s like a road map for the many different hats we wear.”

Although it might not have been the kind of work Budde expected to do starting out, completing the assessment checklist provided a solid foundation for her role moving forward. “There’s a lot to learn when you first get started, and this was very helpful getting me started a little more quickly,” she says. “Now that I have it, it’s almost like having a manual for the position.”

## Preventive Care

The assessment is divided into broad sections that map out specific information for an association to gather, from insurance policies and governing documents to financial procedures and leadership development strategies. The completed document serves as a quick refer-

ence guide, detailing where the information resides and who is responsible for it.

“I thought the staff-directed information—staff positions, benefits and training—was particularly interesting and helpful,” Lasky says.

Answering the questions often triggers insight. “There’s a section that references having graphics showing membership growth and loss for the past five years,” he says. “I read that and got to thinking about the value of having those graphs for the individual months, since this tends to be directly related to the time of year.”

The assessment can also prove beneficial for orienting new staff members—especially those from outside the real estate world who might not immediately grasp the specific nuances of the profession and the organization. “What a great way for a new hire to dig in,” Lasky says. “I find context is really important, and explaining the value of this goes a long way toward explaining the organization.”

As the AE of an association with almost 4,000 members and a staff of 13, Lasky is directly involved with the creation and maintenance of the checklist, working with two other staff members. Associations larger than his might have the work fully done by director-level or operational staff. For smaller organizations like Budde’s, which has 385 members and only two full-time staff people, it’s usually the AE who does the heavy lifting.



WEST CENTRAL ASSOCIATION OF REALTORS®



NORTH SHORE-BARRINGTON ASSOCIATION OF REALTORS®

From left, Cara Budde, CEO at West Central Association of REALTORS®, and Jeff Lasky, CEO at North Shore-Barrington Association of REALTORS®, have both found NAR's Organization Assessment Checklist to be a helpful tool that puts association information at their fingertips.

From a continuity perspective, the checklist may be especially useful to smaller associations—especially those that don't have a full-time staff executive or staff secretary, Lasky adds. "While the larger associations might not always be able to find all this information, they likely have it somewhere, whereas those smaller organizations might not and could therefore really profit from having it intentionally compiled and stored."

"The organizational checklist allows us to create the same spirit of excellence that a larger association can provide," says Budde. "We can still do big things and make a big difference with the same guidance and strategic planning. That's what I love about the resources NAR provides."

Most days, the information compiled for an organizational audit won't be needed. But when a specific issue does arise, it's good to know that you're prepared, Lasky says. "I use every opportunity I can to look a bit smarter than I really am, and something like this helps," he says. "It allows me to be able to put my hands on a document right away and give a quick answer."

### An Apple a Day

Lasky and Budde encourage other AEs to use the checklist. Though Lasky admits the 20-page document can appear intimidating at first, he cautions against feeling overwhelmed by it.

"Once you start looking into it, you realize it's not nearly as onerous as you thought it was going to be," he says. "We decided that once a week we'd sit down and knock out a page, and we easily had it done in less than half a year. Some things go faster than others, but nothing takes a long period of time."

Budde agrees that the benefits—in knowledge, preparedness and operational awareness—far outweigh the effort. The checklist can also help illustrate the demands of the position. "Whether they scan it or really read it, it can be a tool for leadership to understand what you're dealing with," she says.

It's been two years since Budde conducted the organizational audit; she's ready to update the document, after which she'll share it with her new president. Lasky anticipates thoroughly revisiting the assessment every three years in conjunction with the creation of his association's new three-year strategic plan.

### Increased Wellness

The ongoing beauty of the checklist, Budde says, is its continued usefulness and its ability to expand to changing times.

"There's always something you want to work on, whether it's there and you want to improve upon it, or whether you go to a conference and learn something new that you want to implement," she says. "The checklist helps you constantly strengthen your foundation."

And a solid foundation at the local level leads to a stronger organization overall.

"I was just on a call that discussed how, by working better together, the national association and the state associations and the local associations can maximize what we do for our members and the relationships we have with each other," Lasky says. "The Organization Assessment Checklist is an example of something NAR provides that does that. It helps us individually and makes us collectively stronger." ●

*Eric Johnson is a writer living in Wisconsin.*

## The Checklist: A Primer

The Organization Assessment Checklist provides AEs a comprehensive resource for compiling important information and evaluating processes and procedures.

The 20-page Word document, developed by the Association Executives Committee's Structural Audit Work Group, lists information associations should have available. To complete the form, staff indicate where the information can be found and who is responsible for it. A president/chief staff executive checklist helps AEs and their presidents define their respective roles and duties.

The information covered by the Organization Assessment Checklist is extensive, ranging from the historical (when the association was chartered by NAR and the location of the charter) to the practical, like lockbox replacement policies and details regarding office equipment. It also has sections that cover legal issues, data security and government affairs.

"As with any great tool, it teaches you by providing questions as well as answers," says Jeff Lasky, RCE, CEO of the North Shore-Barrington Association of REALTORS®. "It's a very helpful tool."

[nar.realtor/ae/organization-assessment-checklist](https://nar.realtor/ae/organization-assessment-checklist)

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## 6 Ways to Partner With Your Board of Directors

Good governance enhances association effectiveness and executive well-being. **BY MATT TROIANI**



When association executives think about governance, they typically think about fiduciary duties, governing documents and operating in the best interest of the association. However, it can be easy to overlook the toll that failure to observe best governance practices can have on AEs, boards and associations.

Best governance practices include ensuring that all parties contributing to the process understand their distinct roles and responsibilities. This allows AEs and the members of board of directors to operate in sync and the association to thrive. Directors derive satisfaction from their volunteer efforts, and the AE is empowered to execute the association's mission as part of a collaborative partnership with the board.

Ideally, the board and the AE cooperate to promote the interests of the association and its members. The board adopts the governing documents, defines the mission and sets goals. It then directs and empowers the AE to carry out the mission and goals set by the board through the AE's management of association staff and resources.

The challenge facing many AEs is how to effectively engage directors while promoting a division of responsibilities between AEs and the board to maximize the association's performance. Here are some tips and best practices for ensuring that the respective roles of boards

and AEs are complementary and clearly defined and serve the best interests of the association and its membership.

the board and provide valuable feedback on how AEs can better support the board in achieving the association's objectives.

### 1 Review the governing documents.

Well-drafted bylaws provide the board and the AE with a road map on roles and responsibilities and are helpful as a reference to ensure the association stays on course.

### 2 Build and maintain trust.

Trust is essential to any successful relationship, including between the AE and board. Trust is earned by clear, candid communication. AEs should be transparent and willing to share both good and bad news with the board. They should also follow through on board directives. Trust is especially important between the board president and the AE, as they will be working together to determine priorities, set the agenda and run meetings.

### 3 Solicit feedback.

AEs should consider regularly engaging directors for feedback to enhance the partnership between the AE and the board and to understand directors' individual volunteer experience. Feedback can be obtained informally through conversations or even anonymously to ensure candid responses. Asking for board feedback can enhance trust, provide an opportunity for directors to think critically about the role of

### 4 Conduct a director orientation.

Consider holding an annual board of directors orientation for incoming directors. Whether the directors have no prior experience or have previously served on boards, this is an opportunity to educate and set expectations. Director orientations typically include an overview of the association's mission, strategic plan, bylaws and policies, fiduciary duties, budgetary process and expectations for directors during their term on the board.

### 5 Guide strategic meetings.

AEs can counsel or guide the officers and directors to ensure efficient and productive board meetings. For example, AEs can counsel board presidents to create meeting agendas focused on high-level reporting and action items requiring board awareness and approval. AEs can also incorporate the association's mission, vision and strategic plan in the board meeting packet to facilitate strategic decision-making. AEs may recommend the board adopt a fiduciary pledge that directors acknowledge at the start of every meeting.

### 6 Establish protocols for director-staff



**communications.** The board hires, directs and supervises the AE so that the AE can manage association staff. With changing leadership each year, having an initial conversation will help the AE and board leadership understand each other's communication styles and preferences. This in turn can help the AE work with staff to understand the board's expectations and develop protocols so staff can effectively deliver great service and support the board's efforts. This will ensure a productive working relationship between the board and staff—and help the AE execute the association's mission with staff's assistance.

When AEs proactively take steps to establish and maintain effective and



**AEs may see their well-being enhanced thanks to reduced stress and the feeling of empowerment that comes from true alignment and partnership between the AE and the board.**

strategic relationships with association leadership, this will in turn increase the likelihood that the AE is able to deliver on the association's goals. Organizational success directly benefits the members, directors, staff and the AE, but AEs may also see their well-being enhanced thanks to reduced stress and the feeling of

empowerment that comes from true alignment and partnership between the AE and the board. ●



*Matt Troiani is senior counsel and director of legal affairs at the National Association of REALTORS®.*



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## Is a Merger Right for You?

These NAR resources can walk you through the process. **BY DANIEL DOEPKE**

**Y**

ou asked, we're answering. Association executives face complicated scenarios every day. One scenario that's particularly hot is whether and how to merge with another association.

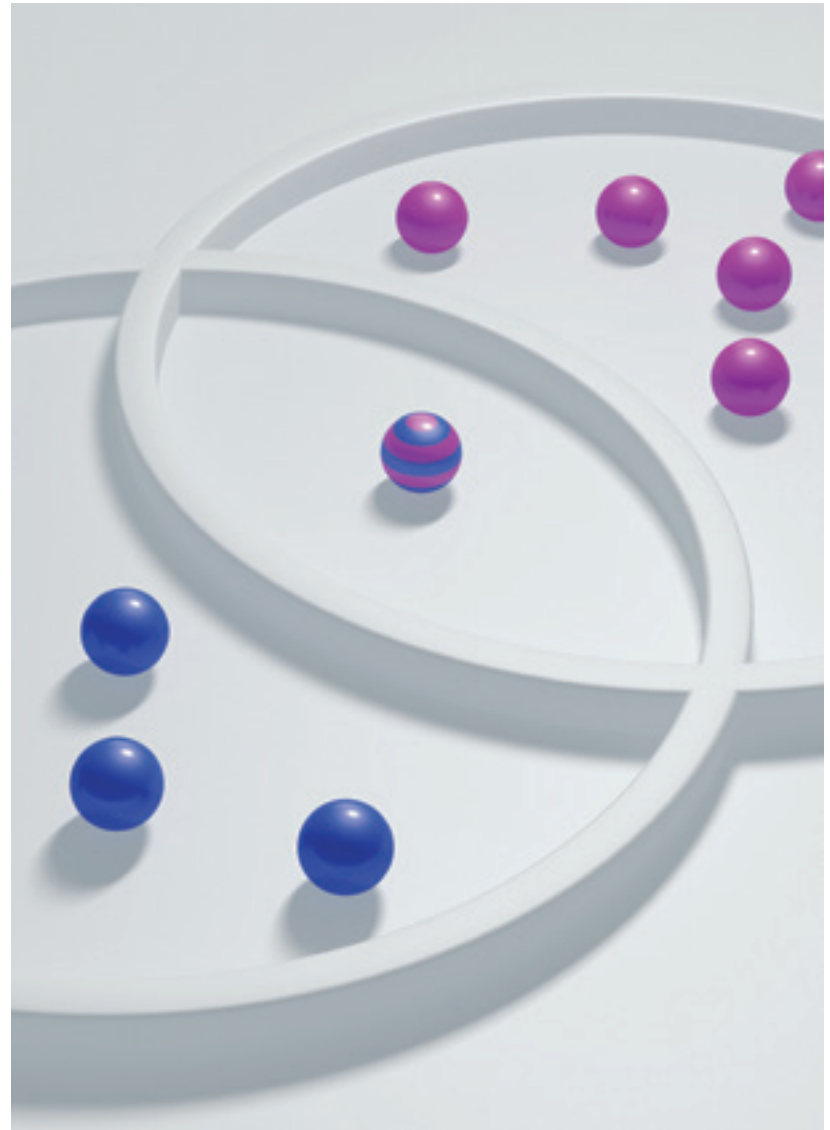
### **Our association has started to explore the possibility of merging with another association, but we're not quite sure where to start. What do we need to know?**

Two associations merging can often be a sensible idea for the members of both associations. Pooling resources through a merger can make for a larger and stronger association that serves its membership more easily and efficiently.

When starting those discussions, the road ahead can seem uncertain, and it can be difficult to figure out where to begin and what steps to take. Luckily, the National Association of REALTORS® has several resources available to help with the process.

NAR's REALTOR® Association Merger Kit contains the merger procedure, a step-by-step guide, sample merger documents and helpful articles on guiding your association through a successful merger. We recommend sharing the Merger Kit with your leadership early in the process of a merger.

When beginning the conversation about merging, it is important to identify clear goals and desires on both sides of a merger. To get the ball rolling, each association's leadership should talk about its hopes and expectations for the merged association. If a merger seems beneficial to both associations and the desire is to move forward, it's generally a good idea to discuss the idea with your membership earlier rather than later. If members don't feel like their opinions have been listened to and considered, they will be less likely to trust any part of the process and



may ultimately vote against the merger for that reason. Transparency is the key to any successful merger.

Remember that no two mergers look the same. Each situation is unique in its challenges, and what can go smoothly in one merger can be a major headache in another.

Sometimes associations fear a loss of identity when merging with another association. In those cases, the formation of a

“chapter” within the new association structure might alleviate those fears. In other mergers, distribution of assets or the potential loss of the old association's office space can become a major issue. When those kinds of issues appear, it can be a good idea to seek the services of a merger facilitator. Merger facilitators are neutral parties with experience navigating associations through this often difficult

“

Transparency is the key to any successful merger.

process. A facilitator can assist in reaching consensus on tricky issues while progressing forward in a timely manner. As a service to associations, NAR maintains a list of qualified merger facilitators in its Core Standards Facilitators Resource Database.

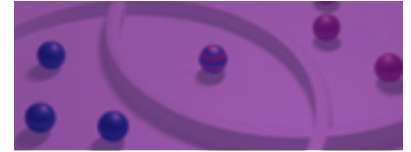
If and when the details are hammered out and the merger moves forward, you can lean on NAR’s Association Merger Procedure. NAR’s part of the process is mostly administrative; it largely consists of receiving record of a full membership vote in favor of the merger

from both associations and with a quorum present. As always, consulting your local legal counsel throughout the process is necessary, as state laws regarding mergers can vary quite a bit. For any other questions concerning mergers, feel free to contact NAR’s Member Experience team at 312-329-8399 or [narpolicyquestions@nar.realtor](mailto:narpolicyquestions@nar.realtor).



Daniel Doepke is director of member

policy at the National Association of REALTORS®.



### Helpful Links

- REALTOR® Association Merger Kit: [nar.realtor/sites/default/files/documents/NAR-Merger-Kit-July-2019.pdf](http://nar.realtor/sites/default/files/documents/NAR-Merger-Kit-July-2019.pdf)
- Core Standards Facilitators Resource Database: [nar.realtor/CoreStdFac.nsf](http://nar.realtor/CoreStdFac.nsf) (login required)
- Association Merger Procedure: [nar.realtor/about-nar/policies/association-merger-procedure](http://nar.realtor/about-nar/policies/association-merger-procedure)



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## The Physical and Mental Exhaustion of Burnout

When you're in a pressure cooker, sometimes the best advice is just to get out. **BY CAROLE KAPTUR**



You wake up in the morning and the first thing you think is, "I can't. I can't come up with another idea. I can't have another difficult conversation. I can't do any more with less. I just can't." But you drag yourself to work, spend

a long time trying to figure out what you're supposed to be doing and then can't seem to find the energy to get started. A staff member approaches you with a question, and you snap at him needlessly. You get yourself yet another cup of coffee and another doughnut, while noticing your clothes seem a little snug. You ask yourself whether it's all worth it.

If this is the case, you, my friend, may be burned out.

The Mayo Clinic describes burnout as a "special type of work-related stress—a state of physical or emotional exhaustion that also involves a sense of reduced accomplishment and loss of personal identity." I want to also include "mental exhaustion" in that definition. People I've talked with about burnout express that they seem to lack a fundamental ability to think. They'll stare at their screen, even when they are trying to put a simple priority list together. They can't seem to find the words to get started.

With everything the world has experienced in the last few years, it would not be at all surprising to learn that increased numbers of people are experiencing burnout. In many instances, people suffering from burnout are likely interacting with others who are also burned out, making for a perfect storm of poor relationship interactions. The question is, what do we do about this? And how do we get over it?

Common advice is to reassess, prioritize, scale back, exercise and seek out our support network. I'm going to suggest another option to begin: In my experience dealing



You're really the only person who can take the pressure off yourself.

with employees, especially those in service roles, those who are most easily able to get beyond burnout start with time off.

And now it's almost as if I can hear a chorus of people saying, "But, but, but ... ." Listen to me on this: If you don't start with time off, it will only be that much more difficult to recover. How can anyone possibly start reassessing or accomplishing any other recommended steps without a clear heart and mind?

The Dalai Lama, who is known for being wise, said, "... if you feel 'burnout' setting in, if you feel demoralized and exhausted, it is best, for the sake of everyone, to withdraw and restore yourself. The point is to have a long-term perspective." So, take some time and do nothing. Binge-watch television, take long walks or go for a leisurely bike ride. Do something totally different, but don't put pressure on yourself to do it. Give yourself permission to be a couch potato. You're really the only person who can take the pressure off yourself. You aren't doing the association any good if you're burned out. Take the time. Then come back and do what needs to be done.

While you're taking that time, laugh. If you're

going to be a couch potato, then watch comedians and comedy shows on a streaming service. Go see a live comedian. Do something fun or try something from your bucket list. Laughing increases our physical health by boosting our immunity, diminishing stress hormones and giving us an overall sense of well-being.

Another behavior that's shown to provide increased mental health benefits is varying our routine and trying something new. This is where the bucket list could come in handy. Walk a different path, vary your exercise routine or try a new recipe.

These suggestions are not necessarily a cure-all, but they will get you started on recovering. When you return to full speed, take into consideration how you got to this point. Use that insight to make adjustments going forward to keep yourself from getting burned out again. ●



Carole Kaptur, SHRM-SCP, RCE, is

director of human resources outreach for the National Association of REALTORS®, overseeing the Strategic Association Management Services, Talent Development and Resources group.



## Ask Me a Question

10 things it would have been nice to know before taking on the AE role. **BY BOB TAYLOR**



Ever notice how great we—both individuals and organizations—can make ourselves look on paper?

Yet while experience suggests that employers have become very adept at getting beyond the resume by asking good questions of employment prospects, a list of questions for those considering a new position as a REALTOR® association executive is not easily found.

In 2013, the Grosse Pointe Board of REALTORS® was hemorrhaging about \$25,000 a year. It did not operate an MLS, and access to MLS data was available through a regional MLS with eight shareholders, any of whom could provide entry. Local membership dues were the highest among 10 surrounding associations. Its territorial jurisdiction of 11 square miles had about 250 agents, and total staff hours were 75 hours per week. Is anyone interested in the job so far?

Fortunately, I had great trust in an AE I had known for 30-plus years and in another state AE and mentor. Both encouraged me to apply.

I knew a bit about the association from my 40 years of selling in the area. It had been formed in 1986 to provide a hyper-local relationship between the members and the community. I knew it did not want to fail, and neither did I.

Unfortunately, not everyone has the luxury of such connections, experience and knowledge when seeking a new position. There is, however, information that can provide glimpses into the soul of an association. Here is a non-exhaustive list of what I suggest potential AEs look for.

1. **Look for a mission statement, culture statement or vision statement.** If such a statement is not evident, you have an opportunity to help provide this direction.
2. **Look at Core Standards information from the previous two years.** This tool is a great way to see what the association does and does not, all in one spot.
3. **Look at the financial information.** Knowing who reviews the financials and how frequently will tell you what an incoming AE may need to do to improve the sophistication of the volunteer leadership when it comes to the finances. Also, subtract any revenue supplied by an

MLS. This will allow you to see the association's real financial health.

4. **Look at affiliate benefits and other rights and privileges available to secondary members.**

Because affiliates are not given access to the MLS, a primary value for REALTOR® members, low numbers or constant turnover of affiliates would indicate they derive no value from membership, meaning the association's value may be solely MLS-derived. As MLSs continue to consolidate, associations that do not provide value to their members will no longer need to exist.

5. **Ask the association who it considers its most visible employee.** If the receptionist is the first person a member meets when entering the board office, that person is the face of the association.

If you have an electronic attendant, remember how you greet members is how members will greet you.

6. **Ask about association metrics.** Does the association know its attrition and membership growth rates? How is member engagement measured, excluding MLS-related activities? Are the broker involvement program and calls to action managed at the local level?
7. **How are committees, task forces and work groups populated?**

Are volunteers invited to apply, or is it a closed popularity contest with the same people participating every year? This may be the real tell of how truly engaged the members are—and are encouraged to be.

8. **What are the nomination and election processes for the board of directors or other such positions?** Can individuals self-nominate? What are the basic qualifications for service?

9. **Is there a young professionals network?** If there is, what are its governing documents? Such a network is necessary to help grow the next generation of association leaders.

10. **How often is the association's strategic plan reviewed?** A strategic plan today must be a living document.

I suspect it might be intimidating for a job applicant to ask for such specific information. Yet consider how this and other information about a board's operation, culture and history could help an AE looking for a new opportunity. For an association seeking someone to lead it to the next level, consider how you'd feel about a candidate who took the time to dig this deep. ●



*Bob Taylor, RCE, is CEO of the Grosse Pointe Board of REALTORS® in Michigan.*



## Focus and Refuel

Heartland REALTOR® Organization  
CEO Jim Haisler finds his zen.

Jim Haisler, RCE, CIPS, has a motto that's front and center on his LinkedIn profile: "Bring it on; life is never boring!" At Heartland, Haisler keeps a full schedule serving nearly 1,200 REALTOR® members and more than 150 affiliate members, but he still takes time to refuel. Here, he shares his best advice on how he makes work-life balance a priority.

**Q: Jim, let's get practical. You're very busy, as we all are. How do you find time for personal wellness?**

Honestly, it's simple: We get what we focus on. If you want to find time for yourself, you need to make time for yourself. I'm a morning person. I get up at 5:45 a.m. and am on my bike by 6 to ride for an hour, weather permitting. In winter, I ride an indoor bike, but it's less motivating so I usually do just 30 minutes.

**Q: Along with being an avid morning bike rider, you're also a beekeeper. How do these hobbies fuel you in your daily work life?**

Bike riding is so peaceful. It provides me a wonderful hour to let my mind wander with no interference. I call it "white

time," instead of "white noise." It's incredibly therapeutic. I often can't tell you what I thought about on my ride, but I feel like my thoughts have organized and I'm a better person for that time.

Bees are just fun. Beekeeping is a hobby that allows us "beeks" to take care of them on our own schedule. When I've got a few minutes and want to go check on the girls, I do. Watching these incredibly curious creatures fly around, land on you—even lick you—is crazy cool. I'm wearing a veil, but often not gloves, and typically wearing shorts. If you listen to the bees, they'll tell you when they've had enough and it's time to leave them "bee." Seriously. It's almost meditative.

**Q: How do you support wellness among your staff and members?**

Admittedly, I'm not a fan of having staff work from home, but I do have two (of the five of us) who each get one day a week from home. Another one likes to take walks, so she takes a couple a week during office hours. We can't pay top dollar, but extra perks offer real value. I instituted the "hall pass" program so an employee can work through lunch and leave early. I'm also very flexible with doctor's appointments during the day.

**Q: How do you feel balance in your life benefits your members?**

It motivates them to also find time for themselves. I constantly post my bike rides on Facebook. Why? First, it makes me accountable [to continue doing what I say I'm going to do]. I didn't say it was easy getting up at 5:45 a.m.! Second, I believe it motivates others to push themselves. Like it or not, AEs are leaders, and leaders have a responsibility to lead.

**Q: If you could give other AEs just one piece of encouragement about finding wellness in their own lives, what would you say?**

I'll go back to "we get what we focus on." What are you focusing on? What's really important to you? How are you going to focus on it? Then ask yourself, how committed are you to that goal? ●



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