

# REALTOR® AE

REALTOR.ORG/RAE

## Going Mobile

The best apps to reach members on the move

Page 12

**Texting Works**

Page 16

**Setting Social Media Policy**

Page 22

**Protect Yourself From Cybercrime**

Page 24

NATIONAL ASSOCIATION of REALTORS®





# GUARANTEED LOWEST PRICES!

Serving REALTOR® Associations for over 20 years

NATIONAL SIGN DISPLAY

## NEW...

### FEATHER FLAG KIT

Includes everything!  
96" Tall flag  
Poles  
Spike  
Carry Bag  
Guaranteed lowest wholesale price.

AGENTS Love these flags 😊



Black or White



FLYER STANDS  
Acrylic



### PVC POST KIT

Includes Ground Anchor  
72" Tall  
Packaged in 48" reusable case. Fits in car trunk.

No more UPS oversized shipping charges! 😊



STEEL A-FRAME



PVC A-FRAME



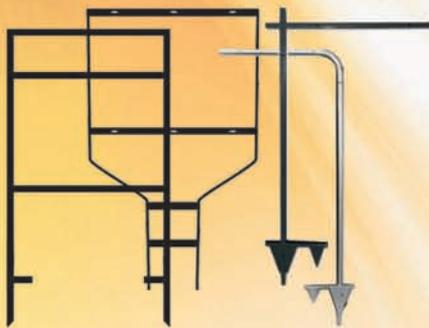
HOUSE SHAPED SIGNS & MORE



FLAGS



STOCK RIDERS



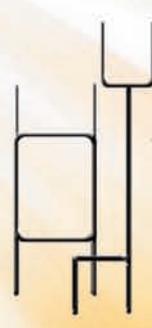
INSERT FRAMES



CB POSTS



SIGN STAKES



CORO STAKES



100+ More Products Available



10960 Boatman Ave., Stanton, CA. 90680

WWW.NSDINFO.COM

\* PH: 800-888-3228

\* FAX: 714-236-0200

### 2016–2017 RAE Editorial Advisory Board

Wyndi Austin, RCE  
Southeast Valley Regional  
Association of REALTORS<sup>®</sup>, Ariz.

Brenda Barnhardt  
REALTORS<sup>®</sup> Association of  
Northwestern Wisconsin

Maria Brogan  
The Northeast Association  
of REALTORS<sup>®</sup>, Ma.

Denise Day  
Butler County Association  
of REALTORS<sup>®</sup>, Pa.

Tina Dorward  
Ozaukee REALTORS<sup>®</sup>  
Association, Wis.

Diane Escure  
Moses Lake Othello Board  
of REALTORS<sup>®</sup>, Wash.

Christopher Harrigan, RCE  
National Association  
of REALTORS<sup>®</sup>

Bill Head  
Metrotex Association of  
REALTORS<sup>®</sup>, Texas

Edward Jekel  
Mohawk Valley Association  
of REALTORS<sup>®</sup>, N.Y.

Hank Lerner  
Pennsylvania Association  
of REALTORS<sup>®</sup>

Steve Reese  
Oklahoma Association  
of REALTORS<sup>®</sup>

Andrew Sims  
Birmingham Area Association  
of REALTORS<sup>®</sup>, Ala.

Heather Tenney, RCE  
Coastal Carolinas Association  
of REALTORS<sup>®</sup>, S.C.

Vicki Heebner  
Ocean City Board of  
REALTORS<sup>®</sup>, N.J.

Dale Zahn, RCE  
West Michigan Lakeshore  
Association of REALTORS<sup>®</sup>

The RAE 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, e-mail Carolyn Schwaar, cschwaar@realtors.org.

## features

### Mobile Apps for Member Service

New tools to help you engage with members and volunteers on the go.

[Page 12](#)



## AE voices

### AE COMMITTEE CHAIR UPDATE Core Standards 2.0, Better, Easier

[Page 2](#)

### PROFILE

#### Laura Crowther

CEO of the Coastal Carolinas Association of REALTORS<sup>®</sup> on outreach, technology, and AEI.

[Page 28](#)

## online

### REALTOR.ORG/RAE

Read past issues in text and PDF format and access online exclusives.

**TWITTER** @RealtorAEMag

**FACEBOOK** facebook.com/RealtorAEMag



### Text Me!

REALTOR<sup>®</sup> associations add text messaging to their communication tool kits with good results.

[Page 16](#)

## news

### HOT TOPICS

#### Louisiana REALTORS<sup>®</sup> Bring Flood Relief

[Page 4](#)

### SUCCESSFUL PROGRAMS

Association charity events, fundraisers, and other ideas to inspire your community involvement.

[Page 5](#)

### SMALL BOARD

#### Better Training for Volunteer Leaders

Resources abound for developing more supportive and informed directors.

[Page 24](#)



### SUCCESSES & CHALLENGES

AEs at the 2016 AE Institute talk about their biggest successes and challenges of the past year.

[Page 8](#)



### LEGAL

#### You're the Ideal Target for Cybercrime

Is your association implementing appropriate data security measures?

[Page 26](#)

## need to know

### POLICY

#### Setting Social Media Policy

Guidelines empower leaders and staff to responsibly engage online.

[Page 22](#)



# Core Standards 2.0, Better, Easier



**Marc Lebowitz, RCE, CAE,**  
CEO, Tucson Association of  
REALTORS®, 2016 chair of  
the AE Committee

When the leadership of the AEC met in August 2015 to determine our priorities for the upcoming year, revisiting Core Standards was at the top of our list. We had collected lots of feedback and dozens of ideas from our AE community over the course of cycles 1 and 2 and felt the time was right to dive in.

The first task was choosing the right team to work on what was already being called Core Standards 2.0. First, we called Travis Kessler in Texas (a member of the original PAG) and asked him to lead the effort. Creating a balanced team was key. We included a few members from the original PAG; a couple of members who had served on the Appeals Hearing panels, so they understood the challenges; state AEs who had experience administering the process; local AEs from large and small associations; and key NAR staff.

With our team in place we convened in Chicago on some of the coldest days in modern recorded history, Feb.11-12. With Travis' guidance, we created two lists: what we liked most about Core Standards and what we liked least.

## What we like most is that Core Standards:

- Strengthen (local, state, national) relationships, creating a sense of being on the same team
- Raise the bar to focus on what should be done as a professional organization;
- Promote financial solvency (a key strength)
- Provide focus and forward-thinking planning
- Boost pride in the organization;
- Create best practices to do what we should be doing
- Create a baseline to keep associations on track
- Help associations create a strong vision for the future
- Emphasize on the value of staff
- Drive home the importance of planning (whether business or strategic)

## What we like least is that Core Standards:

- Require a difficult and often confusing online compliance form
- Do not hold REALTORS® administering associations without staff to the same education requirement as AEs
- Run on a midyear timetable inconsistent with associations' calendar year activities
- Allow for strategic plans that are too basic to be effective
- Give a perception that state associations do not have to comply with the same requirements

- Do not include a REALTOR® leadership development requirement

Finally, there was the perception that some state associations were more thorough than others in reviewing the certifications offered by their local associations.

It became abundantly clear that we liked what Core Standards does for our organizations and that we needed to make some improvements to the certification process.

With that insight, we drafted 13 recommendations and sent them to NAR leadership for review, then delivered a presentation at the 2016 AEI in San Antonio.

With a green light from NAR leadership and a solidly positive response at AEI, the next step is a presentation in May to the AE Committee, then a vote by the NAR Board of Directors.

Just before the AEI presentation, I was talking to AE Andrea Bushnell (the chair of the original Core Standards PAG), who said, "Don't be nervous about this. All of these changes came directly from our colleagues. These are the improvements that we collectively want to see."

If you weren't at AEI for the presentation, it's available online at [realtor.org/](http://realtor.org/) association-executives. Let me know what you think ([marc@tucsonrealtors.org](mailto:marc@tucsonrealtors.org)).

Hopefully we'll come out of the May meetings with a revised professional road map. Core Standards 2.0 will be bigger, bolder, and easier to use. Stay tuned.



430 N. Michigan Ave.,  
Chicago, IL 60611-4087  
500 New Jersey Ave., N.W.,  
Washington, DC 20001-2020  
800-874-6500  
[infocentral@realtors.org](mailto:infocentral@realtors.org)  
REALTOR.org

**Chair, Association Executives Committee** Marc Lebowitz, RCE, CAE  
**CEO, National Association of REALTORS®** Dale A. Stinton, RCE, CAE  
**Senior Vice President, Communications** Stephanie Singer  
**VP, Business-to-Business Communications** Stacey Moncrieff

**Editor, REALTOR® AE magazine** Carolyn Schwaar  
**Contributing Editors** Paula Pisani, Bob Soron  
**Questions and comments** e-mail: [cschwaar@realtors.org](mailto:cschwaar@realtors.org)  
**Advertising Sales** Natalie Matter DeSoto,  
800-501-9571 or 717-580-8184,  
[natalie.desoto@theygsgroup.com](mailto:natalie.desoto@theygsgroup.com)

©2016 by the National Association of REALTORS®. All rights reserved. (ISSN 0034-0804) REALTOR® AE is a professional magazine published four times yearly by the National Association of REALTORS® as a service for REALTOR® association executives. Articles in this magazine are written from the perspective of the REALTOR® association executive. REALTOR® AE is an informational publication of local, state, and national association programs, activities, and current trends and ideas in association management and their practical application in REALTOR® associations. Views and advertising expressed in REALTOR® AE are not necessarily those of or endorsed by the National Association of REALTORS®. Magazine archives available online at [realtor.org/RAE](http://realtor.org/RAE). Reprint permission: [cschwaar@realtors.org](mailto:cschwaar@realtors.org). Distribution: Local and state executive officers, association staff, and MLS directors.  
**Subscriptions:** Call 800-874-6500.





**CRS Data**

# Introducing the MLS Tax Suite

## ONE NEW PRODUCT. ENDLESS PROPERTY DATA OPTIONS.

- Enhanced mapping capabilities
- New product features, like our added home improvement values
- Specifically designed for compatibility on mobile devices
- Simple and fast navigation makes browsing property data easy

**TAKE PROPERTY DATA TO THE NEXT LEVEL** [WWW.CRSDATA.COM](http://WWW.CRSDATA.COM) | 1-800-374-7488

*Visit with us at booth #200 during the REALTORS® Legislative Meetings & Trade Expo.*

## Louisiana REALTORS® Drive Flood Relief to Fellow REALTORS®

Rain was already coming down strong by the time Susan Holliday picked up her colleague Alice Clark for their drive to San Antonio, Texas, to attend the National Association of REALTORS® 2016 AE Institute in March.



“During the AEI, Alice (CEO of the Northeast Louisiana Association of REALTORS®) was on the phone often, getting updates on the flooding in her area,” says Holliday, CEO of the REALTOR® Association of Acadiana, La. “The news just kept getting worse and then she heard that one of her staff had about three feet of water in her home.”

More than two feet of rain fell across Northern Louisiana in a short time sparking major river flooding and rising to historic levels in some areas. State officials identified about 12,000 homes with reports of water damage across the state, and 26 areas were added to the list of federally declared disaster areas.

“We decided we had to do something to help,” says Holliday. “We discussed what needs [Clark’s] members would have and how my association could help.”

Northeast Louisiana Association staff members needed not only dry

temporary housing, but new household items and appliances. They also needed basics such as coffee, toothpaste, paper products, and paper plates, says Holliday, which can quickly add up financially for those displaced by disaster. “So we decided that I would coordinate an effort when I returned from the AEI to collect those items and deliver them as soon as possible.”

The response from Acadiana Association members was “overwhelming, generous, and extremely humbling,” says Holliday. Her staff collected so many donations it filled a rented U-Haul trailer.

“My officers—Allen Duhé, president; Angi Trahan, president elect; and Lisa Roy Sheppert, treasurer—and I made the three-and-a-half-hour drive up to Monroe to meet the leadership of NELAR and unloaded the supplies,” recalls Holliday.

“Several NELAR members I met who were waiting for donations mentioned how strange it felt to be on the receiving end of aid since they are so often on the giving end,” says Holliday. “It was so moving to hear their stories and to see how much these simple items would help to make their current situation better.”



## Help Celebrate 100 Years of Pride in Being a REALTOR®

Throughout 2016, NAR is celebrating the 100th anniversary of the trademark “REALTOR®” by showcasing the members devoted to community, to service, and to going the extra mile. Help NAR gather stories about what your members are doing to improve your community. Do they repair dilapidated homes? Volunteer at a local shelter? Maybe there’s one with a passion for serving veterans, tutoring students, or organizing pledge drives. Encourage members to submit a picture of their charitable work to NAR’s online project showing what REALTORS® are made of. Associations are invited to share as well. Visit [100years.realtor](http://100years.realtor) for more.



On April 1, members of the **San Antonio Board of REALTORS®** helped build and repair homes with their local chapter of Habitat for Humanity. This was the association’s third annual home build with Habitat for Humanity in San Antonio.



More than 500 members of the Illinois Association of REALTORS® converged on the state capitol March 5 for a legislative rally. The group met with lawmakers to advocate for homeowners, commercial real estate, and private property rights, and celebrated the association's 100th anniversary.

### REALTORS® Take Action

More than 525 REALTORS® took part in the April 5 REALTOR® Action Day sponsored by the Wilmington Regional Association of REALTORS®, N.C. Members volunteered throughout the community on dozens of projects from building community garden and planting sea oats at the beach (pictured right) to visiting with senior citizens and cleaning parks.



Agents from Intracoastal Realty at Wrightsville Beach.

### Association Steps up to Help Local Boys & Girls Club of America Find a New Home

When the Coastal Carolina Association of REALTORS® learned that the home of the Boys & Girls Club of America in Myrtle Beach, S.C., was scheduled for demolition by the city, "we knew we really needed to get involved," says Laura Crowther, RCE, CEO of the association. "We put together a meeting with the mayor, the city council, and prominent business people, and we are trying to find a permanent place for their new club."



Currently the Myrtle Beach BGCA is housed in a temporary facility with less than a year left on the lease. While the search is on for a new home for the club—one that may also contribute to the revitalization of the city's downtown area—the association is expanding its support of the organization in other ways, says Crowther. "We have an active YPN group and their plan for the year is to be involved in the club's ongoing initiatives and anything else they need."



A strong showing of members attended the **Chicago Association of REALTORS®** Lobby Day. At the annual luncheon, local legislative representatives discussed the impact of current issues on private property rights.



At the April 5 **Nebraska REALTORS® Association's** 99th Annual Convention & Exhibition, attendees were invited to take a picture with National Association of REALTORS® 2016 President Tom Salomone (pictured center with duck) and share it on social media using #NERealtors.



The **San Mateo County Association of REALTORS®**, Calif., rallied dozens of members, wearing green "Save the Dream" stickers, to fill the San Mateo City Council chambers in a show of opposition to a proposed "urgency" rent control and just cause eviction ordinance. The ordinance failed 3-2.

## Rapattoni Announces Plan to Integrate With RPR® Advanced Multi-List Platform™ (AMP™)

Rapattoni Corp., which provides its MLS platform to nearly 100 MLSs, announced in March a planned integration with the Advanced Multi-List Platform™ (AMP™) from Realtors Property Resource®. RPR AMP™ technology enables application developers, such as Rapattoni, to provide innovative front-end solutions and offer their subscribers tool choice and flexibility. The integration will provide Rapattoni customers access to live listing data and other MLS resources along with data from RPR.

Rapattoni announced last year that it would separate its front end interface

from its back end database, “offering unparalleled flexibility in meeting the evolving needs of real estate associations and their members.” This versatile architecture enables “the Rapattoni MLS to integrate seamlessly with ... AMP™ and other emerging technologies,” Rapattoni said in its press release.

“Rapattoni is a long-time industry partner

and veteran MLS system developer,” said Dale Ross, CEO of RPR®. “RPR® is extremely pleased that Rapattoni has embraced the AMP™ concept of an open database with universal access for all licensed application innovators. Rapattoni has been a leader in providing both association management systems and MLS technology to REALTOR® associations for decades,” he continued. “We look forward to working with the Rapattoni team to help them bring the promise of the AMP™ system to their many MLS clients.”

“We’re looking to the future of the MLS business, anticipating the needs of our customers as well as the industry at large,” said Brian

Tepfer, chief technology officer at Rapattoni. “Our MLS is architected to facilitate integration with a broad spectrum of emerging technologies, allowing MLSs to pull listing data from multiple sources and present it in a single interface. The new AMP™ integration is a dynamic example of how our MLS software uses listing information from multiple databases.”



## Michigan AE Wins Environmental Award

On behalf of his membership, Dale P. Zahn, RCE, CEO of the West Michigan Lakeshore Association of REALTORS®, accepted the Distinguished Volunteer of the Year Award from the Michigan Environmental Health Association. For years, Zahn has worked to create a culture of cooperation between REALTORS® and the County Health Department, resulting in a streamlined program for well and septic evaluations, a convenient handout booklet to distribute to home buyers considering homes with well and septic systems that also appears on the association website, and informational forums on the topics for REALTORS®.

## Funding Young Leaders' Trip to Midyear Meetings Pays Off in Volunteer Service

Every year for the past 10 years, the Minneapolis Area Association of REALTORS® has paid all expenses for three members to attend the National Association of REALTORS® Midyear Legislative Meetings held in Washington, D.C. The return on the association's investment has been great, says Donnie Brown, community affairs manager at MAAR. Of the members awarded scholarships to cover attending the Legislative Meet-

ings, 95 percent have gone on to serve on MAAR committees and more than a third on NAR committees, says Brown. “More than



75 percent have served on the MAAR board, 61 percent have served as committee chairs, four have served on the executive committee, two have served as MAAR president, and six of the recipients currently serve on the state's committees and board.” Each year, the association reviews dozens of applications for its two scholarship programs, the Jean Leake Emerging Markets Scholarship and the Anne Brockhouse Future Leader Scholarship.

Attending the REALTORS® Legislative Meetings & Trade Show?  
Visit Us at Booth #510 for a Live Demo!

## MOBILE ACCESS MADE EASY



### Open Lockboxes with your Smartphone or Tablet

- Provides a means of access without any other devices – no fob necessary!



### Instant Showing Notification

- Quick feedback allowing for quick reactions and more sales.



## MANAGE YOUR LOCKBOXES WITH YOUR MOBILE DEVICE



Borrow or Take Ownership of Lockboxes



Release Your Lockbox Shackle



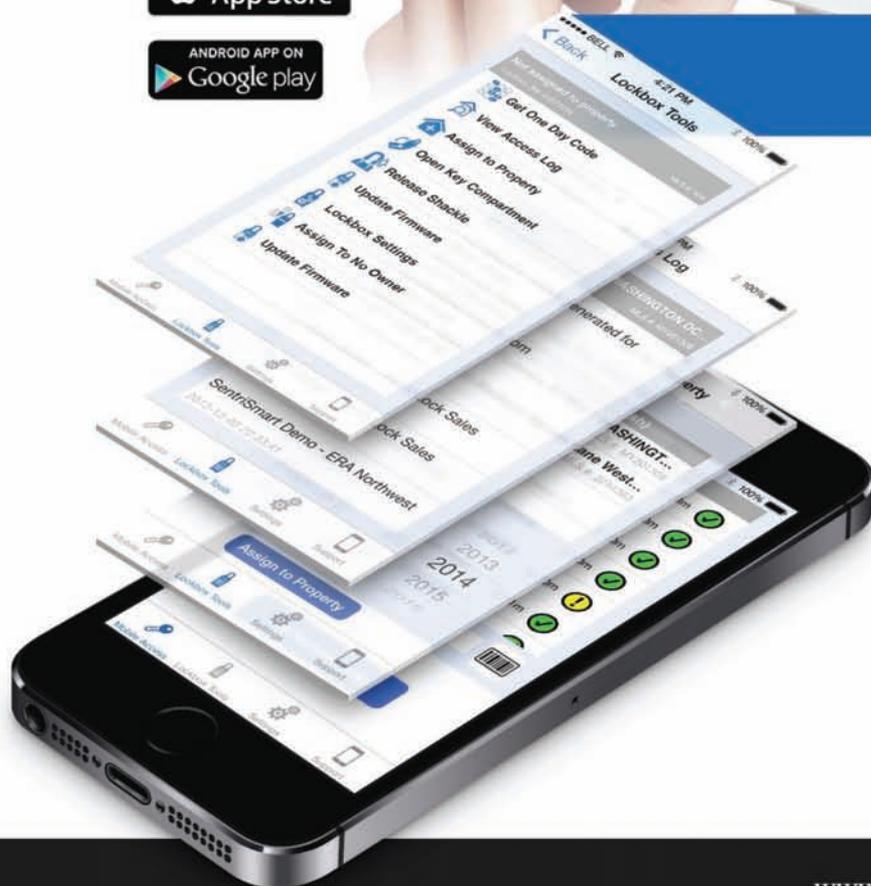
Assign/Remove Lockbox from Property



View Who Showed Your Property and When



Generate One Day Codes to Allow Out-of-Area Agents, Contractors or Others Secure Property Access



www.sentrilock.com

Toll Free: 1-866-736-2322  
Email: inq@sentrilock.com

**AT AEI**  
March 15-19, San Antonio



**Suzanne Young, Honolulu Board of REALTORS® 5,758 members**

“One of the greatest successes we’ve had recently is our program to go out to the members’ offices instead of having them all come to our office for events or education. We have nearly 6,000 members, and we’ve deployed about five or six staff members to go out to the offices to make themselves available to do training. We’ve found the reception from members to be really great. We deliver MLS training, new tools, and information about the Code of Ethics, and we’ve heard good things from the members who really appreciate the fact that we’re going out to them. We started this as an experiment in 2014 with one staff member doing it, but last year we started shuffling duties to allow more staff to do it. We still have people back at the office, but we have more of our staff out in the field, and it has made a difference.”



**Paul Cauchi, e-PRO, senior vice president of commercial, Miami Association of REALTORS® 1,900 members**

“One exciting initiative that we’re working on is expanding our commercial YPN. We have about 2,000 members, and we’re trying to find the next generation of leaders to engage the younger commercial practitioners and to identify future leaders, especially those who want to get involved but don’t really know how. We’re pairing young members with practitioners who have been in the business a long time. Miami also has a robust residential YPN, and we’ve started incorporating some of them into our classes to teach our commercial members how to create dynamic videos, and how to use drones and new social media tools. Commercial agents tend to be less experienced with new technology than residential agents. Our goal for commercial events is to incorporate both education and networking as well as including young residential agents interested in commercial.”



**Kathy Ludwig, CEO, Greater Harrisburg Association of REALTORS®, Pa., 1,635 members**

“In the past year, our biggest challenge—or opportunity, depending on how you look at it—was when we brought our MLS, which was an independent operation, back under the association umbrella. It was a move done to cut costs. We felt we had two of everything—two copiers, two phone systems—and it was really redundant. We had to mesh the staff and try to get them to understand their respective responsibilities and what the others do in regard to how it all services our members. So that was also a success, because it worked for us. Our members never felt any change in our level of service. We’re also one of the associations involved with the TREND/MRIS MLS merger, so that’s the next big item on our plate. We’re looking forward to those discussions.”



**Doris A. Nurenberg, RCE, CEO, North Carolina Regional MLS, 5,000 subscribers**

“We’re a new regional MLS, so I’m a virtual CEO at this point, and that’s been a challenge to learn how to work without staff. Our nine associations are all in the MLS conversion process, so I need to keep in constant contact with the AEs to help them and also address the challenges the members face. It’s a big interruption in members’ businesses because they have to learn everything all over again. The AEs, too, are learning to be something different without an MLS, so that’s a transition that we’re all working toward. Relationship building is really important toward making this regional MLS successful. I love the challenge, though, I’m really glad I did it. It’s very exciting. I think the trend toward regional MLSs should continue because the benefits to the members are just amazing, but the challenge is the change—REALTORS® just don’t embrace change as well as I would like them to.”



**Lorri Edwards, AE, Columbus Board of REALTORS®, Ga., 649 members**

“Making it through our first audit was a big success in the last year. I am the new AE at the association, so I learned a lot about the processes and history here through the audit. I know it’s an expense but it is good for associations to have an audit as part of the Core Standards. I was able to learn about the checks and balances that are in place to avoid any questions and to be transparent. We’ll establish more of these going forward. Getting through Core Standards was a challenge but my board did rather well. I’m not worried about the new additions to the Core Standards; I just think it makes us better. Accountability makes us perform better and my board is very supportive, although I would like to see more volunteer leaders directly involved in working on the Core Standards reporting. It would not only be easier if everyone participated, but it would be a good learning process for everyone.”

# ALL-NEW FREE AGENT PROFILES

*A strong brand impression will help build your business.*

Empty Profile



US

Completed, Powerful Profile



## A completed profile helps:

-  Increase exposure for you, your listings, and your recommendations.
-  Increase SEO for yourself. 70%<sup>1</sup> of traffic to realtor.com® Agent Profiles comes from organic search.<sup>2</sup>
-  Allows you to showcase your expertise with active and sold listings.<sup>3</sup>

**New: Activity Insight** - stay informed about views, visitors, and inquiries to your profile page with this new control panel feature!

➤ *Get your profile now:*  
**realtor.com/agentprofile**

<sup>1</sup>Based on July '15, August '15 & till Sep 24<sup>th</sup>, 2015 realtor.com® agent profile page traffic numbers.

<sup>2</sup>Organic search: consumers using Google, Bing etc. to search REALTORS® online.

<sup>3</sup>Data must be provided to realtor.com® by your MLS.



# License Your Real Estate Forms to zipLogix

New NAR member benefit features NAR library of forms and templates

It's no secret that the adoption of new and innovative technologies is driving efficiency and success throughout the real estate industry. This is in large part due to the emergence of millennial home buyers—a group that accounts for 32 percent of the market, according to NAR's consumer research, highlighted in the *2015 National Association of REALTORS® Home Buyer and Seller Generational Trends* study. Millennials not only want to use technology in their day-to-day lives, they expect to use it.

REALTOR® associations need to understand this paradigm shift and provide value-added benefits to help their members adapt. That's the thinking behind the recent announcement that this year NAR will provide zipLogix technology as a member benefit. The benefit includes zipTMS, unlimited zipVault document storage, NAR's new library of REALTOR® Forms & Templates, and access to the industry-standard zipForm Plus forms engine. Combined, these services create new and exciting ways for REALTORS® to get to the closing table faster.

## Licensing Forms to zipLogix

REALTOR® associations can maximize the value of this benefit by making their state and local forms libraries available through zipForm Plus Forms Library. We are already working with associations around the country to get their forms uploaded. Reach out to the zipLogix team directly at sales@zipform.com to help prioritize your association among the more than 1,300 that are expected to offer their forms as part of this benefit.

To participate, representatives from your association will be asked to sign a short agreement that gives zipLogix permission to

license your forms. Once the agreement is complete, zipLogix will help design the digital versions of your forms and insert them in the zipForm Plus forms engine on your behalf, making them accessible for members to use.

Each state and local association determines how to handle the monetary aspect of providing access to these forms. Some REALTOR® associations offer their forms at no cost; others charge an annual fee to capture non-dues revenue that supports other initiatives.

For associations that charge for their forms, zipLogix will implement those business rules, collect the revenue on behalf of the association, and then issue a check to the association every quarter for fees collected.

**Each state and local association determines how to handle the monetary aspect of providing access to their state and local forms libraries.**

## Promoting NAR Benefits to Members

Associations looking to promote and market the NAR benefit to their members can use a comprehensive marketing kit from zipLogix. This kit includes social media posts, prepared e-mails about the NAR benefit, and a news release, as well as images and banners for the association website. The marketing kit also includes links to the zipLogix training calendar, including live training events and ongoing training support.

Essentially, everything that zipLogix has at its disposal is available for associations to help market and promote the NAR benefit.

And if you don't see material that might help get the message out, contact zipLogix to discuss creating custom marketing collateral for your association.

## Ongoing Education

There are a number of educational opportunities that will help users get the most out of these technology solutions.

ZipLogix representatives are available to conduct custom association training seminars that are recorded and archived. These recordings are then provided to the association to use as needed and are a great tool for members who missed the training, are new to this technology, or just want a refresher on the finer points of the software.

Within the applications themselves are educational tips and tricks, as well as quick walk-throughs that teach users how to perform a task or process. Additionally, users can access help files that link to YouTube video demonstrations or PDF help guides if they need to know how to perform a specific function.

These training tools are updated as new versions of the software or new products are released. ZipLogix also regularly updates its database of resources to ensure that users have access to the most current and comprehensive tools available to take full advantage of their new NAR member benefit.



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

zipLogix is the exclusive forms software provider for the National Association of REALTORS®. zipLogix Digital Ink® is not endorsed by NAR and is not included as part of NAR's REALTOR Benefits® Program.



CHRYSLER PACIFICA



RAM® 1500



CHRYSLER 300



DODGE DURANGO



JEEP® GRAND CHEROKEE



# WHEN IT'S INNOVATION, FUEL EFFICIENCY OR JUST LOOKING GOOD, HAVING THE RIGHT MOBILE OFFICE WILL GET YOU FAR.

BENEFITS EXTEND TO YOU AND YOUR FAMILY.

**\$500** NAR CASH ALLOWANCE + MOST NATIONAL AND LOCAL INCENTIVES = **BIG SAVINGS**

The \$500 cash allowance is also available to you, as association staff and your family members in the same household. The savings can be used toward the purchase or lease of almost any FCA US LLC (formerly Chrysler Group LLC) vehicle. This incentive can be combined with most other existing offers. Share with members! REALTORS® receive the \$500 cash allowance plus no-charge 2-year gas/diesel lube-oil-filter.

 FIAT CHRYSLER AUTOMOBILES		 NATIONAL ASSOCIATION of REALTORS® <i>REALTOR Benefits® Program</i>
Official Automobile Manufacturer of the National Association of REALTORS®		

VISIT [REALTOR.ORG/FCA](http://REALTOR.ORG/FCA) FOR DETAILS



\*Some program exclusions and limitations apply. Not available on SRT and Viper models. See dealer for complete details and eligibility requirements. Chrysler, Dodge, Jeep and Ram are registered trademarks of FCA US LLC. FIAT is a registered trademark of FCA Group Marketing S.p.A., used under license by FCA US LLC.

# MOBILE APPS FOR MEMBER SERVICE

New tools to help you engage with members and volunteers on the go.

It's hard to overestimate the effect of mobile technology on members' businesses. Text messaging, Internet searches, and social media are among the top uses of smart phones, and these are all essential components of daily real estate practice. From communicating with clients to searching the MLS and generating leads from Facebook and Twitter, members are never far from their phones. So how can your association begin to capitalize on the mobile movement to reach members where

they are most—on their smart phones?

Other than having a mobile-ready association website, which is a given today, here are six ways your association can engage with members using mobile devices. Of course there will always be a segment of your membership that lags in technology use and understanding, but don't let that stop you from becoming a trusted leader in mobile app usage and showing members how to make the most of their mobile future.

## Mobile apps to facilitate committees and directors

The day when all your directors attend a board meeting by staring into the camera on their smartphone isn't far off. Mobile video conferencing apps abound, including **Tango**, **ooVoo**, **Wire**, and **Facebook Messenger**, and even **WhatsApp** is expected to introduce free video calls soon. In fact, the most popular, **Skype**, announced group video calling on mobile phones and tablets in March. This means up to 25 committee members at a time can meet anytime, anywhere with free video calls (when their phones are connected to a Wi-Fi network at home, at the airport, or at Starbucks, for example). **Google Hangouts** is another video chat option that can connect up to 10 people. Providing members with the option to participate in meetings remotely

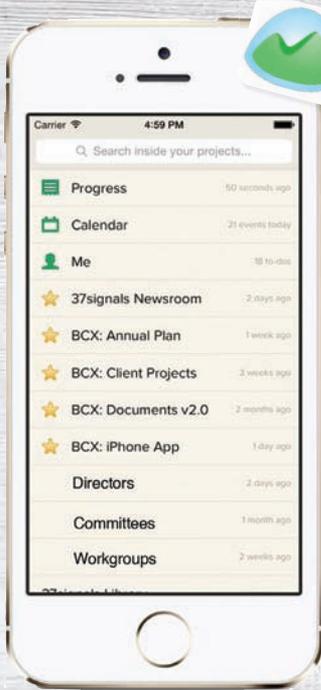
may boost volunteer participation.

Of course, getting your committee members to see and hear one another is just one piece of the meeting puzzle. They need to be able to read and often collaborate on documents. Many video apps include a chat feature where you can share the link to documents you post online. Google Hangouts achieves this very elegantly since it's part of the Google suite of tools including Google Docs. Slack, the free text messaging system for groups, is gaining popularity as better than e-mail when it comes to keeping groups in touch.

Enable your committees to use their mobile devices to edit the same document, post updates to projects, upload documents, and assign and manage tasks with popular online



*Skype introduced group video for mobile in March.*



*Basecamp for mobile keeps committee members connected to projects and tasks.*

## Mobile apps for conferences and events

There are a lot of options for mobile event apps ranging widely in price and features, but if a simple schedule and session descriptions are your main goal, then there are plenty of free and low-cost options; **Eventbase**, **Guidebook**, and **Twoppy** are a few. Mobile event apps are great for everything from small meetings and classes with agendas up to large-scale conferences with exhibitors. Robust options offer

built-in event surveys; push notifications (such as “The welcome reception starts in five minutes in Ballroom B”); attendee chat functions; and storage for presentation handouts or PowerPoint slides to download. A mobile Dropbox for your handouts is a cost-effective alternative if your event app doesn’t have storage.



*Eventbase has options for small meetings up to full-scale conventions.*

collaboration tools such as **Basecamp**, **Redbooth**, **Podio**, and **Trello** that offer mobile versions or work on smartphones and tablets. Although editing Word documents on an iPhone is not ideal, it works in a pinch.

Take your board meeting to the next level with apps specifically designed to facilitate board meetings, such as BoardPaq, Convene, and BoardEffect. These apps have a wide range of features and enable you to track which directors have checked in and actually reviewed the documents. Directors can review archived meeting notes and save their personal notes in their private access dashboard.

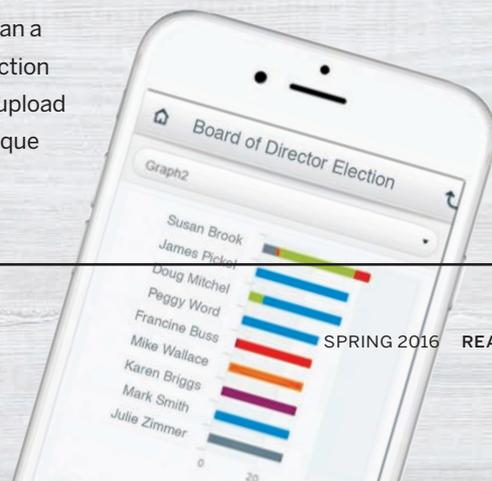
Finally, now there are a range of mobile apps to help you plan a meeting for your committee members and directors. No more multiple e-mails and phone calls back and forth to coordinate everyone’s schedule. Try **ScheduleOnce**, Doodle’s **MeetMe** service, or **SelectTheDate**.

## Mobile apps for voting and surveys

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 with apps such as **MyVote**, **Electionbuddy**, and **Doodle** (the same app you can use for meeting scheduling). With MyVote, members can cast votes for association leadership from their mobile phones. Electionbuddy provides candidate profiles that offer the same amount of information for each individual. This feature is proven to increase voter participation because voters feel more involved in the process. Rather than a simple polling app, look for an election app that enables you to securely upload your member list, then send a unique

voting link to each eligible voter. You can’t see whom members voted for but you can track if they voted. Follow-up with e-mails or texts to members who haven’t voted yet.

Most voting apps can also be used for polls and short surveys, from how members rate their latest class to business polls and feedback on your customer service. For more comprehensive membership surveys, including multiple-choice questions and write-in answers, there’s still not much competition for **PollDaddy’s** and **SurveyMonkey’s** sleek mobile versions.



## Mobile apps for volunteer signups

Make volunteering for committees, events, and work groups as quick and easy as possible with a mobile app. Sure, your voting or survey apps could double as sign-up apps, but specific apps for this purpose, such as **SignupGenius**, **VolunteerSpot**, **Volgistics** and **VolunteerKinetic**, are more appealing.

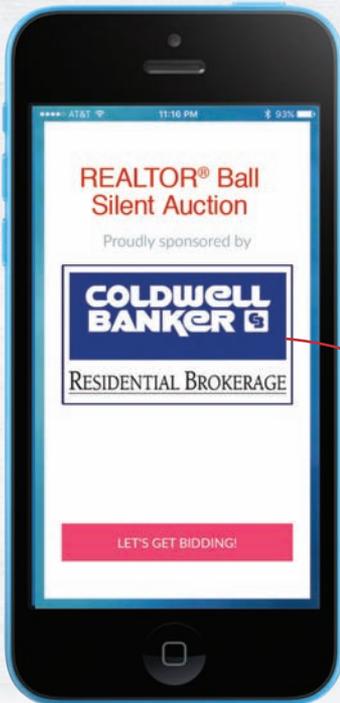
SignupGenius offers a nicely designed, easy-to-use template page where you describe the purpose of your committee, work group, or charity event and enter the dates and times for which you need members' help. In addition to soliciting official work group participation, these types

of apps are ideal for organizing YPN events, Habitat for Humanity builds, clothing or school supply drives, and neighborhood beautification programs. There's an option to text volunteers with updates and reminders.

Once volunteers are signed up, continue the virtual engagement with apps that send messages via text and track volunteer hours and project progress. Some apps let members earn points for tasks completed, which can help spur participation for virtual volunteers.



Many apps for volunteering also send reminders and sync with e-calendars.



Sponsors can off-set the costs of some handy apps.

## Mobile apps for silent auctions and fundraising

Expand your silent auction participation to members not attending your event with user-friendly apps such as **Handbid** and **Bidpal**. These apps feature photos and descriptions of the auction items, mobile bidding, and real-time, higher-bid notifications that keep participants in the game.

Raise money for your association's charitable arm, education foundation, or disaster relief fund with mobile apps such as **Givelify** and **Crowdster**. These require members to download the app, but a new breed of donating via mobile from companies such as @Pay enables members to simply reply to an e-mail or a text message instead of entering their name, address, and credit card information into online forms. With the rapid adoption of mobile wallet technology from Apple and Samsung, paying for items or services (and donating) with a smartphone may soon seem as normal as using a bank card.

Another mobile giving option growing popular comes from apps such as





*REALTOR® Action Center app lets members learn how state and local association are using NAR programs to build political strength in their own backyard.*

**ActionSprout** that link to your association's Facebook page and are optimized for mobile use. ActionSprout enables you to launch fundraising drives (as well as volunteer and event sign-ups, and other "actions") directly inside of Facebook. Members' actions are then shared to their Facebook friends and followers to spread the word.

Facebook itself introduced a new donation feature in November 2015 that enables charities to launch standalone fundraising pages—in addition to their general Facebook

profile pages—to collect and track donations for a specific collection effort, such as disaster relief or your association's annual charity drive. Once users enter their credit card information, the donate button will let users contribute to a charity through Facebook instead of having to navigate to an external donation site.

Remember, RPAC fundraising online is legal only when using technology that enables you to solicit only from REALTORS®, not the general public.

## How do I learn (and teach members) how to use these new apps?

If your association is offering or recommending these apps to members, you—or at least someone on your staff—is expected to be the expert. Video tutorials on the vendors' sites and on YouTube are your best source for learning how to get the most out of your new apps. Alternatively, appoint a committee member, YPN chair, or other tech-savvy volunteer to assume the role of app master at your association.

*As digital wallets gain acceptance, it will become easier for members to pay dues, contribute to RPAC, and donate to charity via smartphone apps.*

## Mobile apps from NAR

All these apps are available for iPhone and Android users and are free of charge.

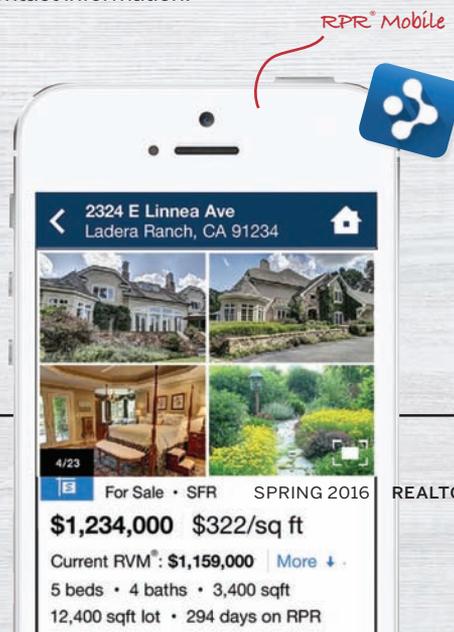
The **NAR Action Center** app features political stories from the REALTOR® Action Center, the Washington Report, and online dynamic reports to track state and local REALTOR® Party engagement and Call for Action participation. Plus, members can make their annual investment via their phone.

The **NAR Member Center** app enables members to review their benefits; read the latest information from their local, state, and national associations; customize and display their membership card; and more.

**REALTOR® Magazine's** app features the latest issue and web exclusives.

The **REALTORS® Conference & Expo** app is a guide to the event's more than 100 education sessions, nearly 400 industry exhibitors, and more. **NAR Legislative** is the app for the REALTORS® Legislative Meetings & Trade Expo.

With **RPR® Mobile**, REALTORS® can use their location to search for on- and off-market properties while also uncovering mortgage, historical and distressed data; flood zones; school info; and more. Then, easily create one of five different property and neighborhood reports, each branded with a photo, logo, and contact information.



# Text Me!

REALTOR® associations add text messaging to their communication tool kits with good results.

By Bridget McCrea

Every month, the SouthEast Valley Regional Association of REALTORS® in Mesa, Ariz., sends one or two text messages to 9,377 phone-toting members who opted into the program, from a total membership of about 12,000. Most messages concern upcoming dues deadlines, membership meeting reminders, urgent news (such as if a major system is down), or significant association events.

Wyndi Austin, director of marketing communications, says the association decided to use texting after she noticed members using more mobile devices to view its website. Using the Ez Texting messaging platform, the organization purchased a package that includes a specific number of monthly “credits”; each text sent uses two credits.

For the last three years, the association has sent just one or two texts per month. This optimal level was determined based on member input that said “most of them like receiving messages from us,” says Austin, “as long as we don’t abuse it or overdo it.” Before launching the program, Austin consulted with the National Association of REALTORS® to ensure that the program didn’t violate the CAN-SPAM Act, which

sets the rules for commercial e-mail, establishes requirements for commercial messages, and gives recipients the right to opt out of receiving messages.

Calling the effort “wildly successful,” Austin sees texting as an immediate way to reach members without calling or waiting for e-mails to be opened. From the association perspective, she says, sending a text and including a link to sign up for a class or attend an event is easy. “Personally, I’d love it if we could increase the frequency to three a month, but our members are already being bombarded by messaging,” says Austin, “so we’re staying true to our promise.”

## More Texts, Please

As REALTORS® use texting more often in their personal lives, they’re more likely to accept it from their association. More associations are turning to texting as a result. The benefits are clear: Open rates for text messaging are about 98 percent versus 15 to 22 percent for e-mail, according to Mobile Marketing Watch. According to CTIA, a wireless industry trade group, it takes 90 minutes for the average person to respond to an e-mail, but only 90 seconds to respond to a text message. (Continued on p. 18)

May 22, 2016, 8:30 AM

Text messages have a 98 percent open rate while email has only a 20 percent open rate. (Mobile Marketing Watch)

Delivered



# WORKING TOGETHER TO KEEP REALTORS® AT THE CENTER OF THE TRANSACTION



The NATIONAL ASSOCIATION OF REALTORS® and zipLogix™ are working together to keep REALTORS® at the center of the transaction today and into the future.

This year NAR will be providing a valuable member benefit to REALTORS® nationwide. The new benefit includes zipTMS™ robust transaction management system, unlimited zipVault® document storage, an exclusive NAR library of REALTOR® Forms & Templates, and access to the industry-standard zipForm® Plus forms engine where members can add and manage their own custom documents. State and local forms libraries may also be available if they are licensed to zipLogix™ (some fees, which are set by state and local associations/boards, may apply).

REALTORS® will benefit from zipLogix™'s state-of-the-art technology, which ensures data integrity, security and disaster recovery and a standardized technology platform designed to create efficiencies and streamline processes.

With this step toward a comprehensive transaction platform, NAR is committed to making sure REALTORS® have the tools they need to succeed in today's dynamic real estate environment and remain at the center of the real estate transaction.

**To learn more about this new member benefit,  
visit [www.zipLogix.com/narbenefit](http://www.zipLogix.com/narbenefit).**



“A link is right there in the text for [members] to access a mobile site and pay [their dues]. We think it contributed to our very high early renewal rate this year.” — Danielle Boutin, REALTORS® Association of the Palm Beaches, Fla.

May 14, 2016, 1:30 PM

Texting is the most widely used and frequently used smartphone app, with 97 percent of Americans using it at least once a day. (Pew Internet)

Delivered

May 14, 2016, 1:50 PM

More than 6 billion text messages are sent in the U.S. each day. (Forrester)

June 1, 2016, 6:30 PM

Text messaging has a 45 percent response rate, while e-mail has only a 6 percent response rate. (Velocity)

June 1, 2016, 6:40 PM

80% of people use texting for business. (eWeek)

(Continued from p. 18)

MetroTex Association of REALTORS® in Dallas has been using text messaging for about two years with good results, says Bill Head, director of communications. By texting a short code to a specific number, members opt into the Ez Texting support platform, which the association uses mainly to communicate MLS-related news and association alerts, such as system updates or downtimes. “If we’re going to take the time to text, it has to be important and related to the MLS, not just random stuff,” says Head. The communication method—which was rolled out after a member survey was “quite one-sided toward texting”—is underused, he says. “I’d like to see it used for advocacy as well.”

Texting is not just limited to large metro areas. Vicki Heebner at the 520-member Ocean City Board of REALTORS®, N.J., says her latest association survey showed, for the first time, that texting was the number one way members would like to receive communications from the board, outranking the previous list-topper, e-mail messages.

“Our tech committee researched and tested some of the many texting vendors out there in the market,” says Heebner. “The key features that we identified were the ease of use of the system (we are a small board with a small staff) and the ability to conduct polls. We’ll be testing a vendor for the next six months to see how our membership responds.”

Danielle Boutin, director of emerging technologies and communications at the REALTORS® Association of the Palm Beaches, Fla., says the group’s 3-year-old text effort is also going well. With about 14,000 members, the association uses

Dotsignal—which partially integrates with its contact management system, RAMCO—to send out dues notices, compliance-related announcements, and event information. “It’s been most successful though when sending a dues notification,” she says. “A link is right there in the text for them to access a mobile site and pay. We think it contributed to our very high early renewal rate this year.”

Boutin is careful to send text messages only once or twice a month, but says she would like to see the system used for education reminders and other functions. To make this happen, she says, the association will need to provide an opt-in for members (using short codes such as “reply ‘EDU’ to receive education updates”). “We know our members are inundated with e-mail,” says Boutin, “and texting is just one more way we’ve been able to adapt to their needs.”

However, when associations ask members via survey if they want association texts, the answer is often no. “We are not using text messages,” says Mary Prenon, director of communications at the Hudson Gateway Association of REALTORS® in New York. “We did a survey and members overwhelmingly rejected the idea.”

At the Maryland Association of REALTORS®, “only 8 percent of our membership said they would be OK with text messaging,” says Melissa Lutz, communications and public affairs director. Lutz says she was surprised by the data, considering the popularity of texting among REALTORS® in general.

“We didn’t survey our members,” says Boutin, “but the opt-out rate is very low and it seems to have been well received. I imagine if asked, most members would say no to

# Customized .REALTOR Web Addresses for Your Members



With **.REALTOR**, your members can get creative with their web address while simultaneously promoting their status as a REALTOR®. Help your members strengthen their digital brand with a .REALTOR web address that supports their business goals, like these members:



Focus on  
the areas  
they serve



[www.CoronadoShoresFrankGabriel.REALTOR](http://www.CoronadoShoresFrankGabriel.REALTOR)



Focus on  
buyers



[www.BuywithMiranda.REALTOR](http://www.BuywithMiranda.REALTOR)



Focus on a  
real estate  
specialty



[www.LuxuryLynae.REALTOR](http://www.LuxuryLynae.REALTOR)



**NEW!**  
Focus on a  
designation or  
certification



[www.CRSSusie.REALTOR](http://www.CRSSusie.REALTOR)

The opportunities are endless! Remember, your members have until December 2016 to get their first .REALTOR web address **FREE** for one year. Get started at [www.about.REALTOR](http://www.about.REALTOR)

# REALTOR



NATIONAL  
ASSOCIATION of  
REALTORS®

“[Texting] is something our members said they’d like used for urgent messages that need their immediate attention, including calls for action and legislative advocacy.” — Steve Reese, Oklahoma Association of REALTORS®

May 15, 2016, 4:30 PM

On average, Americans exchange twice as many texts as they do calls. (Nielsen)

May 15, 2016, 4:32 PM

Wow! 😲

texting, assuming they would get bombarded with a ton of texts from the board, but we have shown we use it only when needed.”

### Just Getting Started

This is the year that the Oklahoma Association of REALTORS® will begin text messaging—an effort driven in part by members of its Young Professionals Network. “It’s something our members said they’d like used for urgent messages that need their immediate attention, including calls for action and legislative advocacy,” says Steve Reese, vice president of marketing for the Oklahoma City-based association, “not just for general messaging that they’d typically get from us via e-mail.”

Reese says the system will be set up using mobile app provider BFAC and will provide

local associations in Oklahoma with opt-in codes that members can use to receive app-based text messages from their respective organizations. “The local associations are very member-centric, whereas we deal more with committees and leadership from the state perspective,” says Reese. “For that reason, we felt the messaging needed to come from a local level.”

Once they’ve opted in, members will also receive two to three text messages per month from OAR. Reese expects the communication mode to go over well with members. “We plan to use it very judiciously,” says Reese, “and only for very important, timely messages. Once they see that we’re not spamming or overwhelming them, we think we’ll see pretty good reception to this program.”

## Which texting service is right for your association?

There’s no easy answer to this question, but the good news is that your options are growing almost daily. Texting is a huge business and options range from full-featured plans that enable voice and video texts to lower-cost, bare-bones plans. Most providers’ websites don’t list prices clearly, so have an idea of what you need before you call. Here are some features to

consider—just watch out for those monthly fees, hidden costs, or setup charges.

- Two-way texting so members can respond to your association via text. Some plans actually only allow you to send, not receive. Ask about the price for incoming messages.
- Voice texts (record your own message and send it).
- Social media integration

(send a text and have it post on Facebook and Twitter automatically).

- A user-friendly interface for managing contact lists and campaigns, which also generates reports for messages sent and responded to.
- Preconfigured texting campaigns, such as text-to-vote that integrates with a spreadsheet-type

tally system.

- Integration with your member management system so you can customize messages to members based on their profile or target messages to members who haven’t paid their dues, for example.
- Privacy and security should include safeguards against hackers and assurances that the vendor can’t use or sell your member contact list.



# DEDICATED LEADERSHIP. DEMONSTRATED KNOWLEDGE. REALTOR® UNIVERSITY.

REALTOR® University offers two programs specifically designed for students who hold, or aspire to hold, management positions in REALTOR® associations. Through two programs, the University offers a more in depth understanding of advanced topics in association leadership such as: governance, advocacy, strategic planning, public policy, and program development.

## Choose the program that works for you:

- **Graduate Certificate Program**  
Complete 6 courses (or more depending on background) to earn a Graduate Certificate.
- **Master of Real Estate (MRE) Degree Program**  
Complete 12 courses, with 7 program-specific courses, plus 5 concentration and elective courses for your graduate degree.

Show your commitment to advancing your professionalism and enroll today!

Visit [RealtorU.com](http://RealtorU.com)

*REALTOR® University is the only accredited institution devoted exclusively to real estate and association management. To be admitted to REALTOR® University, applicants must hold a baccalaureate degree from an appropriately accredited institution recognized by the U.S. Department of Education or the Council of Higher Education Accreditation.*

To speak with an Admissions Representative, call **855-RU-ONLINE** (855-786-6546) or email [admissions@realtoruonline.net](mailto:admissions@realtoruonline.net)



# Setting Social Media Policy

Guidelines empower leaders and staff to responsibly engage online.

**W**e all have friends or acquaintances who occasionally post outrageous or downright offensive things online. So what can you do when these friends are your association leadership or staff? Can you dictate what volunteers and employees post from their personal social media profiles?

To a limited degree you can, without infringing on their legal rights or invading their privacy. Here's how.

Social media guidelines for volunteers and staff are in place at many REALTOR® associations nationwide. (To see several samples visit [realtorm.ag/social-policies](http://realtorm.ag/social-policies).)

These guidelines are, at their core, extensions of basic association media communication policies (or, for staff, the employee handbook). They outline who speaks for the association, what type of association information is confidential, and what type of speech, such as discriminatory or hateful, may land the author and the association in legal hot water.

The goal of these guidelines is not to curb free speech or judge people's opinions, but to educate members and staff and guide them toward behavior in keeping with the REALTORS® Code of Ethics, nondisclosure rules for association directors, and basic professionalism.

## All social media is public

Employees, members, and even leaders who believe that their Instagram page or Facebook profile has nothing to do with their work may, in fact, be wrong. Firing employees for comments they post online is not uncommon anymore because employees represent their employers, even from their own social media accounts. In fact, 18 per-

cent of employers report that they've fired people for something they posted on social media, according to a 2015 CareerBuilder survey. Volunteers also can be considered a reflection of their association at all times.

Even when members think their social media engagement is completely secret, accounts can be hacked, privacy settings can change, malware can disable security, and posts can be copied and shared elsewhere.

"Every time someone from leadership or staff opens their mouth in person or online, they are perceived by the wider world to be speaking on behalf of the association, whether true or not. It's called 'apparent authority,'" says David Kissinger, government affairs director at the South Bay Association of REALTORS® in Torrance, Calif.

Kissinger says that his board members are advised that it is their obligation to be aware of how apparent authority gives their words strength and weight in a manner that is not always appropriate. "Just because it is your legal right to speak out does not mean that it is always a good idea," he says.

Leaders may think that a disclaimer on their blog or Twitter page (stating that their opinions do not reflect that of the association) is enough to distance themselves from their associations. But disclaimers are generally ineffective when it comes to public perception, says Nobu Hata, the National Association of REALTORS®' director of digital engagement. "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.'"

## When opinions harm reputations

Can a leader's personal views—a strong and

persistent endorsement of candidates in a divisive election, for example—undermine his or her leadership role or the reputation of the association?

"It's certainly possible," says Teah Hopper, vice president of marketing and communications at Missouri REALTORS®. "We tell leaders, especially presidents, that we want them to have a personality on social media because people connect with that, but I think leadership's personal opinions can affect whether members volunteer or participate in the association, and what they think of their association."

**"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 of digital engagement  
National Association of REALTORS®

This doesn't mean that leaders should limit their posts to association news and the weather, Hopper adds. "In my opinion, everyone is entitled to their own perspective, and with personal or political viewpoints, it comes down to how you express it," she says. "If you're not offensive, not belittling anyone, and not trying to force your views on anyone else, then people can usually see your opinion for what it is: your opinion."

Trouble can surface, however, when

Can you dictate what volunteers and employees post from their personal social media profiles?



well-intentioned members and leaders don't realize how their comments can be misinterpreted online. "Every time I've ever approached a member about a post, the reaction was, 'Oh, my gosh, I didn't realize how that came across' or 'I now see how that could be offensive; what should I do now?'" says Hopper. "The answer is often to just reword the post, remove it, or post a clarification."

Problem posts also can stem from a misunderstanding of where the member was posting and how websites today are tightly interconnected.

"Some folks are compelled to respond to online articles, not realizing that those comments are then showing up everywhere," says Hata. For instance, in order to curb anonymous comments, more online publications are allowing readers to comment only if they sign in using their Facebook or Twitter account. Members often don't realize that any comments they make on an online news site also are distributed on Facebook, Twitter, and anywhere else the article appears.

### Training leaders to be responsible posters

Hopper recently instituted a social media policy for leadership that aims to educate members about how social media posting works, as well as establish some dos and don'ts. "We felt that we haven't had to deal with social media posting issues yet, but we should get ahead of it and establish guidelines."

Hopper's policy asks leaders to "refrain from engaging in social media that may

disparage or harm the image or reputation of the association or any of its employees." The policy cautions leaders not to share confidential information and to represent themselves politically primarily as a member of the Missouri REALTOR® Party, which supports real property rights regardless of political affiliation.

There was no pushback from leadership about the policy, says Hopper. "We tried to keep it more like guidelines. And I think most people look at it and think it's common sense."

Likewise, when Hata speaks to REALTOR® leaders across the country, he says he encounters little resistance to social media guidelines. "Fortunately, over the last four or five years, association leadership has generally accepted the idea that everything they say online can reflect on the association."

### Social media gotchas

Although most social media training for leaders and staff entails guidelines and best practices, there are some hard and fast rules that, if violated, can land your association in legal trouble. For example, it is against

federal election regulations to solicit RPAC donations via a public social media page (but it's allowed in closed REALTOR® groups). Posting confidential information about the association (financial, operational, and legal in nature) might violate a leader's fiduciary duty to the association and can result in legal trouble. Then there are issues when a copyrighted work is posted and libel concerns when leaders post something false about another person, damaging their reputation. Hopper

covers all of these issues in her leadership training.

When leadership or staff violate the social media guidelines and post something confidential, outrageous, or severely objectionable, Hopper has a plan in place. She meets with her CEO, looks at specifically which part of the social media or other policies was violated, then seeks input from in-house legal counsel before she approaches the member directly. "We would tell the member that we want him or her to have an opinion and we respect that opinion, but the post really does not represent our association well, and, as a leader, what they say represents us, so can we talk about how to make this better. If it continues to be an issue, the policy we have enables us to ask the leader to step down."

Social media engagement is often filled with emotion and misunderstanding. "There's definitely no black and white when it comes to social media guidelines. There's a lot of gray," says Hopper. "But the right approach goes a long way."

By Carolyn Schwaar

# Better Training for Volunteer Leaders

Resources abound for developing more supportive and informed directors.

**T**raining your volunteer leaders so that they understand the duties and responsibilities of their position is established routine at many REALTOR® associations, but it's not the practice everywhere.

Some associations lack the time and money for leadership education, and others aren't aware of the resources available from the National Association of REALTORS®. Some associations have leaders who do not travel to national meetings where training and networking is offered.



Leadership and advocacy training for new leaders at the Missouri REALTORS® Association.

"Sometimes there's a lack of interest from leaders in spending a whole day in orientation, or sometimes they believe they know the job already," says Michele Holen, RCE, chief operating officer of the Portland Metropolitan Association of REALTORS® in Oregon.

Holen is chair of the 2016 Volunteer Leadership Training Work Group made up of AEs from across the country. Its goal this year is to help association executives overcome the challenges blocking effective volunteer leadership education. In addition to establishing new ways to promote the leadership training already available from NAR, the work group hopes to enhance training in many areas, including running meetings with

parliamentary procedure, managing conflict, evaluating CEO performance, and working with the media.

## Trained leaders are better leaders

No AE could question the benefit of having leaders who understand their duties, how to fulfill them, and the role and duties of the AE and staff.

For John B. Leonardi, RCE, CEO of the 3,000-member Buffalo Niagara Association of REALTORS® in New York, new leadership orientation is one of the highlights of his year. He has compiled a four-hour, 55-slide program (available for you to adopt at [realtor.org/presentations/better-training-for-volunteer-leaders](http://realtor.org/presentations/better-training-for-volunteer-leaders)) that takes his new volunteers through all the information they need to feel fully integrated and comfortable with their positions.

The focus of Leonardi's program is making sure leaders understand the AE's role as well as their own.

"AEs have a plethora of responsibilities that many volunteers don't even know about or possibly understand," says Leonardi.

## Professional development requirement for elected leaders

If the recommended enhancements to the Core Standards are approved by the NAR Board of Directors in May, all associations will be required to provide resources or access to leadership development education—or training—for elected REALTOR® leaders. This education may take the form of local classes, online resources from the national association, or training offered from state associations.

"I've found that many volunteer leaders have never run a business or managed a staff. An orientation program that showcases your role and responsibilities may protect you from bumps in the road throughout the year."

Leonardi's program begins with a description of what volunteers will learn and why and follows with the association's challenges and goals, discussing how the volunteers play a critical role.



Leadership training for new leaders at the Memphis Area Association of REALTORS®.

After explaining the basics of the leadership team structure and the essentials of teamwork, he continues with an explanation of how associations function differently from brokerages. "The important part here is that more often than not, directors compare their business to that of associations, but they are two different environments. The distinction must be made very clearly."

Several slides in the presentation are dedicated to staff duties. "Don't take for granted that new or existing directors know what staff does. Show them," advises Leonardi. The association's staff responsibility chart is an eye-opener, he says, and generates a good amount of positive discussion.

Leonardi then enlists his legal counsel to review fiduciary duty, state laws governing not-for-profit boards, confidentiality, solidarity and conduct, and Robert's Rules. An outside auditor presents the details of budgets

“Don’t take for granted that new or existing directors know what staff does. Show them.”

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



Training for new volunteer leaders at the Orlando Regional REALTOR® Association.

and how they’re created, profit and loss statements, and how to read a balance sheet. “The reason you want to place a strong emphasis on financials is because for many volunteers this can be scary. They don’t know how to read a financial document so their constant questions can frustrate other directors,” says Leonardi.

At the end, Leonardi’s new leaders walk away with copies of the entire presentation, a laminated copy of the association’s strategic plan, a six-month calendar, and his contact information.

After the orientation, Leonardi says, the mood among his new directors is electric and exciting. “They’re very talkative and very thankful for a thorough presentation,” he says. “Some are overwhelmed, but I would like to think that by the time they decide to run for a position they have a good idea of what they’re getting into.”

An informed director creates a smart and proactive director, says Leonardi, “who will be a great team player.”

### NAR leadership training resources

The National Association of REALTORS® provides several online and in-person leadership training opportunities throughout the year, including:

- The **REALTOR® Leadership Program**, a daylong seminar the day before the Leadership Summit in Chicago in August
- The **Leadership Express**, a series of 40-minute leadership-focused sessions for AEs and their leadership teams held during the REALTORS® Legislative Meetings & Trade Expo
- The **President/President-Elect Roundtables** at all NAR meetings
- The **Leadership Academy**, an 11-month, six-session training and development program designed to foster and develop future NAR Leaders
- The **Volunteer Leadership Resource** toolkit at realtor.org
- The **REALTORS® Excelling in Association Leadership (REAL)** course offered free online through REALTOR® University

REALTOR.ORG/RAE

# NAR’s Official REALTOR® Credit Card



### State and local Association Business Credit Cards have these great features:

- No annual fee
- No personal guarantee or personal credit report required
- Competitive interest rates\*
- Earn and redeem points for your Association with millions of options
- Request cards for your staff to pay for your Association’s expenses

Apply for a REALTOR® Credit Card for your Association today!\*\*

[www.REALTORSFCU.org](http://www.REALTORSFCU.org)  
866.295.6038

Stop by **Booth 1706**  
at the  
**REALTORS® Legislative Meetings & Trade Expo**  
May 11–12, 2016



Proud partner in NAR’s REALTOR Benefits® Program.

\*Your initial Annual Percentage Rate (APR) will range from 8.25% to 18.00% based on your creditworthiness. After this, your APR is subject to change monthly based on the Prime Rate published in the *Wall Street Journal* on the last business day of the prior month. Credit card rates apply to cash advances, balance transfers, and outstanding balances on purchases. There is no annual fee, no balance transfer fee and no cash advance fee. Foreign transactions are subject to a fee of up to 1% of the transaction amount.

\*\*Membership eligibility and Primary Savings account required to join and obtain credit.

Federally insured by NCUA



# You're the Ideal Target for Cybercrime

Small companies rather than large enterprises are the most common victims of hacking, malware attacks, and data theft. Here's how to protect yourself.



National headlines have borne bad tidings of one massive data breach after another in recent years. Judging from the news, it might seem that cybercriminals have their sights set exclusively on massive retail chains, international hotels, and health care giants. This is far from reality. In 2015, small to midsize businesses made up more than 60 percent of cyber-attack victims nationwide. Why would cybercriminals bother with the little guys such as real estate brokerages or even REALTOR® associations?

Big-name breaches make good headlines, but smaller businesses make easy targets for online criminals. This is partly because many small-business owners believe they are “below the radar” for cybercrime and thus fail to implement safety measures to protect themselves from attack. Unfortunately, cybercriminals understand this misperception all too well and are taking active and lucrative advantage of it.

The repercussions of a cyberattack can be devastating. Beyond ruined transactions, long-term reputation damage, and lawsuits

filed by angry clients or members, victimized businesses may also face government action, resulting in fines and other sanctions. Today, most states have enacted laws requiring businesses to take certain measures to safeguard sensitive data in their possession. Although it would be impossible to address every state law here, most states require businesses, including REALTOR® associations, to implement one or more of the following practices.

## **Maintain a data security policy (and follow it)**

A data security policy (also known as a Written Information Security Program, or WISP) provides a road map for creating effective technical, administrative, and physical safeguards for the protection of sensitive or confidential information in a business's possession, including personally identifiable information, or “PII.” The definition of PII varies from state to state, but usually consists of a person's first name (or first initial) and last name with one or more other elements, such as a full date of birth, signature, Social

Security number, or state-issued identification number. For guidance on creating and implementing a WISP, refer to the “NAR Data Privacy and Security Toolkit” on [realtor.org](http://realtor.org).

## **Maintain a document retention and destruction policy (and follow it)**

A document retention and destruction policy sets appropriate time frames for retaining certain categories of documents and dictates the proper safeguarding and disposal of those documents. The NAR Data Privacy and Security Toolkit offers guidance on creating and implementing a document retention and destruction policy.

## **Notify affected parties of a security breach**

Several states require businesses to notify any potentially affected party when it experiences a data breach that exposes, or could reasonably be assumed to have exposed, personally identifiable information. Most laws requiring such notification also require the breached business to take steps to remediate any injuries resulting from the breach.

Companies (and associations) that fail to provide reasonable protections for their clients' or members' online data are exposing themselves to federal, as well as state, legal action.

### Use tech to safeguard personally identifiable information

Some states, including California and Massachusetts, mandate that businesses take "reasonable" measures to safeguard such information in their possession. These measures may include implementing certain technology-based protections, such as maintaining appropriate firewalls and password controls.

It is ultimately up to each business, working with its counsel, to ensure that it is in compliance with all applicable laws concerning data protection. However, regardless of whether a business is required to implement the practices highlighted above, REALTOR® associations and brokerages should seriously consider adopting all these measures as an integral part of their core best practices.

### Federal oversight on the horizon

Most cybersecurity laws applicable to the real estate industry, such as those above, are currently only state-mandated because Congress has yet to pass comprehensive cybersecurity legislation nationwide. Nonetheless, the Federal Trade Commission is homing in on lax cybersecurity business practices across the board and is taking action against companies under its authority to protect consumers from "unfair and deceptive business practices." For example, in 2014 the FTC filed suit against Wyndham Worldwide Corp., alleging that the hospitality company did not take reasonable

measures to protect hotel guests' personally identifiable information. Although the case ultimately settled, the takeaway is this: Companies that fail to provide reasonable protections for their clients' online data are exposing themselves to federal and state legal action.

### Data security laws apply to your association

The National Association of REALTORS® continues to publish materials to help educate our industry about cybercrime and data protection (search "cybercrime" on realtor.org). It is critical to remember that data security laws apply not only to our broker members, but to state and local REALTOR® associations as well. As such, beyond educating their members on cybersecurity best practices, associations themselves should implement appropriate security measures in house.

---

#### NAR Resources

Note: Always work in collaboration with your local counsel in preparing and updating cybersecurity-related policies and programs. For guidance, visit the *NAR Data Security Toolkit* and the "Window to the Law - Cyber Scams and the Real Estate Professional," both at realtor.org.



**Jessica Edgerton** is an associate counsel at the National Association of REALTORS®. Contact her at 312-329-8373 or jedgerton@realtors.org.

## Have You Overlooked Security on Your Smartphone?

Most AEs' tablets and smartphones are for both work and personal use. Apps for accessing files on your office PC sit alongside games and fitness trackers. In fact, more sensitive data about you and your work (passwords, credit card numbers, contacts, messages, e-mail) is accessible from your mobile device than any other piece of technology you have.

Protect it by following these tips.

1. Enable your device's screen lock and change the PIN regularly. Add a more complex lock to your device with apps such as Google Authenticator, Authy, or LastPass Authenticator.
2. Experts advise against saving passwords at individual sites, such as Amazon or Chase, because they can become saved deep in your phone's memory. Instead, use an app designed specifically for saving passwords, such as Dashlane.
3. Update all your apps regularly. Updates provide needed security patches.
4. Know and regularly review your phone's security and permission settings. Have you given Facebook permission to access your e-mail contacts?
5. Use public Wi-Fi with caution. When you're on a café's public Wi-Fi, for example, the café has access to everything you transmit, from text messages to data.
6. Only download apps from a known app store to avoid apps filled with dangerous pieces of malware that could steal your sensitive data.

# Going Mobile to Keep in Touch

**Laura Crowther** stops to talk outreach, technology, and AEI.

From real estate practitioner to state association vice president to CEO of Coastal Carolinas Association of REALTORS®, Laura Crowther, RCE, has seen how the REALTOR® organization works from many vantage points.

and answer any questions members may have. No appointment. Our members are always very welcoming and very proud to show off their office spaces. They appreciate that we're available to them and interested in listening. I think you can lose touch when

you're in your own office all the time or traveling. It's very important for members to understand that you want to know their challenges."

**Q. What technology have you implemented lately that's changed the way your association runs?**

"We're using an app called BoardPAQ to help us organize our meetings for directors

and other key committees. It's been a tremendous time and money saver and we've achieved pretty robust adoption right away. We start building our meetings weeks in advance by loading the documents into the program. The members have access at all times and we can see who has checked in and reviewed the documents, so it boosts accountability. For those who don't have tablets or laptops to bring to meetings, we're providing tablets for members to log into their own BoardPAQ account. Buying tablets was an expense, but it was worth it to have everyone in lockstep during the board meetings and following along. We've also been able to cut down on the number of in-person meetings we have because the board of directors can stay in touch via the app and vote quickly through the app."

**Q. The real estate market in your area is recovering well. What effect has this had on your association offerings?**

"Yes, we've seen a remarkable turnaround in our market and we have a very healthy balance of new construction along with a good inventory of resales. There's more confidence in the market and we're seeing a lot more people come into the business. We're averaging 70 new members a month and we're trying to do more for them by creating a stronger initial value proposition. We offer several free basic classes and send a monthly e-mail to remind them of classes or benefits they can take advantage of. We want to keep it in the forefront of their minds that we're invested in their success. I see the association sort of like AAA; we're there when you need us. I'd like people to value their membership in the association like that. I'd like to see them more often than I need AAA, but it's still that same comfort and value that people feel with the association."

**Q. You're the chair of the 2017 AE Institute planning committee. What's on your wish list for next year's event in Boulder, Colo.?**

"Over the past year, I've done a lot of listening to AEs about what they want and what they like best about AEI. One thing I hear often is that they like having the ability to network with peer groups of like-minded AEs—in other words, AEs from similar-sized associations or AEs who do or do not have an MLS. They get a lot of benefits from talking to others in the same situation and learning best practices.

"I thought the advanced CEO track at AEI this year was particularly successful. It was well received and sold out very quickly. We'll take a look at doing that again for 2017."



Coastal Carolinas Association of REALTORS® CEO Laura Crowther with her organization's outreach van that she drives to events around town and to visit members' offices.

Recently inducted into the Dr. Almon R. (Bud) Smith, RCE, AE Leadership Society, Crowther is known for her strategic planning expertise and savvy business management skills. Here she speaks to RAE about keeping in touch with members, using technology to transform association productivity, and leading the 2017 AE Institute planning committee.

**Q. How do you keep in touch with what members need?**

"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 when I'm out and about, I will always drop into a few offices to say hello

# RISE ABOVE THE MAZE.

Our only business is helping associations like yours grow with research. Association Metrics can help you gather the member data to drive your organization forward. From determining what your members value most, to finding out what they need, our benchmarking studies take the guesswork out of strategic planning, giving you actionable results, with visually-driven reports that you don't have to be a statistician to read.

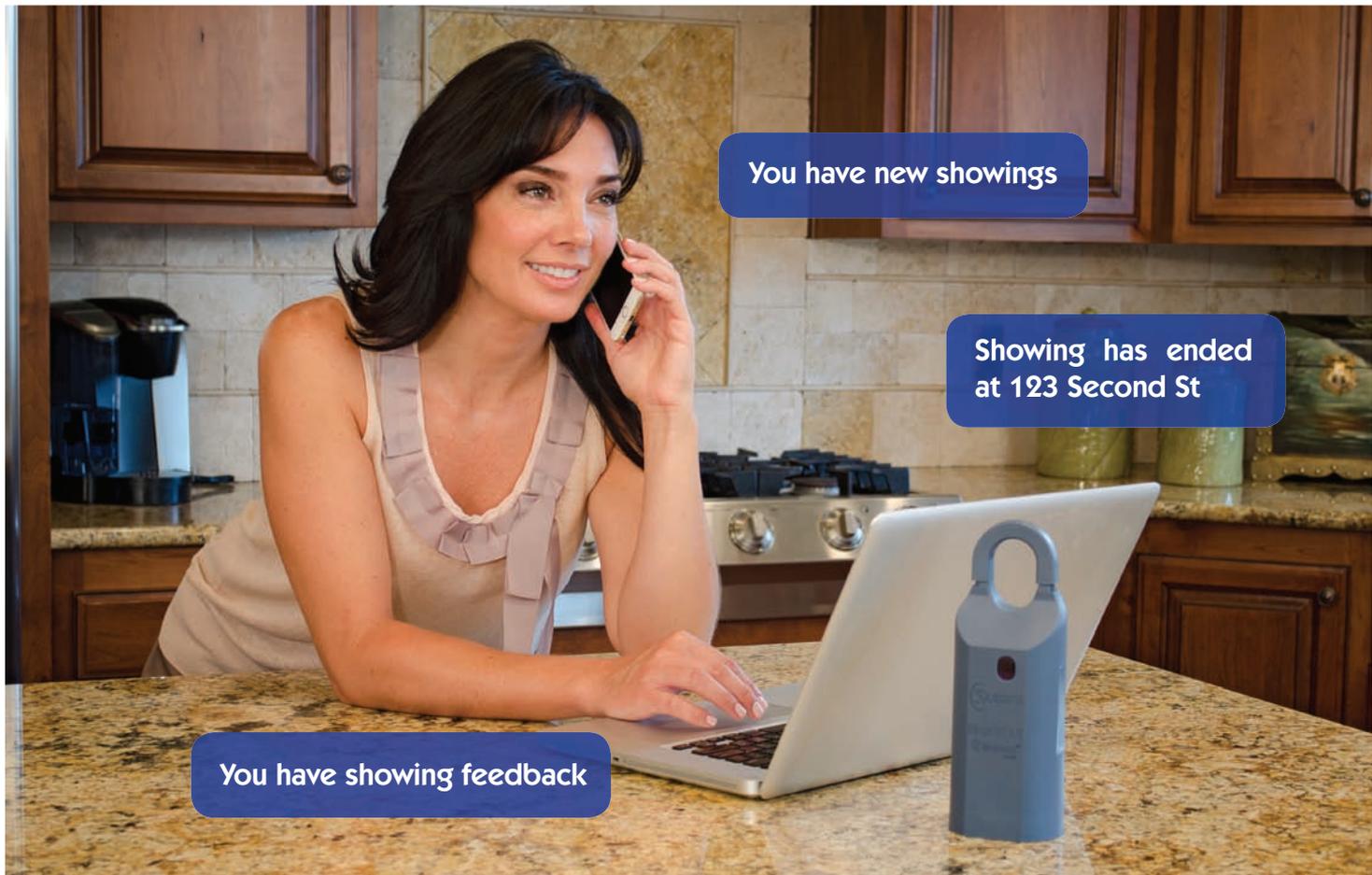
**Find out how you can benefit from our best-in-class tools:**

- Member Needs Assessment
- Member Loyalty Assessment
- Benefits Assessment
- Performance Assessment

Download our white papers online at [associationmetrics.com](http://associationmetrics.com)  
Or email [larry@associationmetrics.com](mailto:larry@associationmetrics.com) to learn more.

Association  
 Metrics





Visit Booth #304 at the REALTORS®  
Legislative Meetings & Trade Expo

## The power of real-time data



800-547-0252  
[www.supraekey.com](http://www.supraekey.com)  
[facebook.com/SupraRealEstate](https://facebook.com/SupraRealEstate)

With the Supra system, the eKEY® and XpressKEY™ send real-time showing notices when a showing begins and has ended. Your members can be informed about what is happening at their listings at all times.

Real-time showing alerts enable agents to monitor activity at their listings, answer questions quickly, and keep home sellers informed. Supra's real-time data means more opportunities for your members.



Supra attempts to provide data and information as near to real-time as possible. There is no expressed or implied guarantee that the data and/or information is accurate or timely or fit for any particular purpose. © 2016 United Technologies Corporation. All rights reserved. All trademarks are the property of their respective owners.