

REALTOR® AE

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Governance Focus

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

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

Take a Fresh Look at Committees



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

This edition of REALTOR® AE is designed to help your association build better committees. As staff leaders, we must not only be open to change, we often need to start the discussion. It's up to us to make sure that our leaderships periodically review all committees to ensure that they are relevant and effective.

When I became the CEO of NYSAR a dozen years ago, it seemed like we couldn't have too many committees, working groups, task forces, PAGs, and the like. Fast forward to now and it seems like leaner and meaner is more the trend. Is leaner better than larger? Maybe.

Included in these pages is thought-provoking and practical information that you can apply to your own association. It will provide a lens for seeing how to better guide committees to advance the goals of your strategic and business plans.

There are REALTOR® association mega-boards with tens of thousands of members, and there are boards of fewer than 100, all meeting the NAR Core Standards. Yet I imagine that no two boards, regardless of



size, have the same committee needs and goals.

I'll share an experience at my association: One of our committees was recently tasked to consider the benefits of reducing our board to below its current membership of 240. We were reacting to a trend that was emerging in which some state and local boards had reduced their size, in some cases significantly. There were very good reasons boards were contracting. In one case, a change was made because they had difficulty establishing a quorum and no work was getting done.

Our committee review was spirited and thoughtful. The focus was on a fundamental question: "Was the board, as currently constructed, making poor or untimely decisions?" No one could recall any, so the matter of cutting back was closed for the time

being. Maybe we missed an opportunity, but I don't think so. In addition to functioning efficiently and effectively, our large board size allowed a lot of members to be actively invested in the association's success.

This process also worked for us because my elected leadership was open to discussing changes based on industry trends but not chained to a preconceived conclusion. The trend did not fit us, but rethinking the structure was a positive thing to do. We will have similar discussions in 2019 about some of our most important committees.

Restructuring discussions are almost always tough. They often mean taking away or shifting highly coveted things such as committee leadership positions. But don't let that deter you and your leadership from building a better association through a better committee structure.



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The Path Toward REALTOR® Association Health Care

Why doesn't the National Association of REALTORS® offer health care, members frequently ask. The quick answer is: It wasn't legal before the 2018 U.S. Department of Labor rule, and even now, significant legal and legislative hurdles remain.

Associations of all kinds strongly applauded President Donald Trump's executive order last year directing the Department of Labor to enact rulemaking that would expand association health plan eligibility to the self-employed and small business owners. Previously, the department did not consider associations with self-employed members to be eligible to offer health plans regulated under the large-group market.

The new rules allow more groups to form association health plans.

Despite the new opportunities to offer health coverage, several hurdles remain. First, there's a lawsuit that could overturn the new federal rule entirely, possibly before remaining parts of it go into effect. A dozen state attorneys general, including from the District of Columbia, are suing the department over

the association health plan rule, arguing that the final rule violates consumer and state protections, among other claims. A decision in this case is expected as early as February.

Despite this, NAR is moving forward with exploring health insurance solutions by conducting surveys, retaining outside health insurance legal experts, and consulting with large insurance companies, along with other efforts to determine the potential options for members.

There's also this: President Trump's executive order is just that: an executive order, not a law. The rule could be overturned by a new administration. NAR-supported legislation such as the Small Business Health Fairness Act of 2017 (H.R.1101), which would more firmly establish association health plans, passed the U.S. House of Representatives in 2017. However, it was not taken up

by the Senate and would need to be reintroduced in the new Congress.

Another major hurdle association health plans face is that they are subject to different rules in each state. The federal rule enabling association health plans leaves many details up to the 50 states and does not preempt state regulation of insurance. "This means we have a fragmented regulatory environment of hostile states and friendly states, with some states embracing the new rule and some rejecting it, and some including sole proprietors, some not," says Christie DeSanctis, an NAR policy director.

As a result of the different regulatory approaches among states and the pending litigation causing general uncertainty, no national health insurance carrier is willing to offer nationwide insurance to NAR at this time, says DeSanctis.

Meanwhile, NAR has co-founded the Coalition to Protect and Promote Association Health Plans, a broad multi-industry coalition of trade associations, to lobby states to view the federal rule more favorably and to push for legislation that would protect large-group eligibility for sole proprietors.

What about state or local solutions?

Several REALTOR® associations recently introduced health insurance benefits to members, while many others have offered health insurance programs for years. Many of these benefits are not association health plans but instead help members find affordable health insurance through existing markets, which for many REALTORS® is half the battle.

For example, the Bay East Association of REALTORS® and the North Bay Association of REALTORS® in Northern California offer members free access to an independent insurance agency that can place members in individual and group plans both approved by the Affordable Care Act and outside the ACA. Likewise, the Massachusetts Association of REALTORS® partners with Health Services Administrators, New England's largest benefits marketplace for small businesses, individuals, associations, and chambers of commerce, to help members find options under a variety of insurers.

The National Association of REALTORS® has offered this service since 2013 through its REALTORS® Insurance Marketplace. Every year, thousands of members find affordable coverage through this member benefit.

"We help members navigate major medical plans currently available through the ACA exchanges and outside of them," says Shannon Kennedy, president of SASid Inc., administrator of NAR's REALTORS® Insurance Marketplace. "Plus, we explain the benefits of supplementary plans and offer group dental and vision."

For 2019, REALTORS® Insurance Marketplace began offering new flexible term health plans that provide a more affordable insurance option. New federal rules expand the time limit of these plans from 60 to 364 days and allow limited renewals. This change, and the elimination of the mandate to have qualified health insurance or face a tax penalty, enables members to consider lower-cost major medical plans tailored to

Some REALTOR® associations face state regulatory hurdles in their effort to offer members affordable health insurance.



their needs.

"For REALTORS® who struggled to afford major medical plans through the ACA exchanges in the past, these new flexible term plans may be a solution," says Kennedy. "Plus, if you're a healthy young person with comfortable savings, you may opt to not pay for broad coverage that includes maternity care or preexisting conditions."

The Colorado Association of REALTORS® also saw the removal of the mandate and the expansion of flexible term policies as an opportunity to offer members a low-cost, limited medical plan for less than \$200 a month. This plan is intended for individuals who want coverage to see a doctor, specialist, or urgent care a few times a year for unexpected health issues, according to the association's website.

Some states, however, restrict the sale of short-term or flexible-term medical plans or require enhanced disclosure to consumers about the limitations of coverage.

The Colorado Association of REALTORS® said in a statement that it hopes to eventually offer members more alternatives to increasing insurance costs, but major medical carriers in the state, such as Aetna, Anthem, and

Cigna have taken a wait-and-see approach and are not offering new AHPs until the DOL issues more clarification on its rule.

The first new REALTOR® association AHPs

When it comes to offering members full health insurance plans under the new Department of Labor rule, the Baldwin County Association of REALTORS® in Alabama may be a trailblazer. In July 2018, Baldwin County CEO Sheila Dodson, RCE, approached Blue Cross and Blue Shield of Alabama, the association's insurance provider for its staff, about health insurance plans for her 2,300 members. Without any health history or demographics about membership other than the average age of members, Blue Cross came back with surprisingly affordable rates, she says.

With a coverage commitment in hand, Dodson and her leadership went to work tackling the details needed to launch the program by the end of 2018. Who would sign members up and administer the program? Who would manage all of the federal and state regulatory paperwork? How would COBRA coverage be offered when a member leaves the association? Could members pay monthly premiums by credit card since they often don't receive a regular paycheck?

"Blue Cross worked with us to find a third-party company to manage the program and meet our unique needs," says Dodson. The administrative costs are incorporated into participants' health insurance premiums. "It wouldn't be fair to use association funds for the program since we knew not all members would take advantage of it, and we were very upfront about the fees in the premiums."

Baldwin County does not subsidize the insurance and the only cost was significant staff time at first, says Dodson, plus setup fees with the third-party administrator, Lockard & Williams Insurance Services. Baldwin

(cont. on p. 6)

(cont. from p. 5)

County signed up 200 members for 2019.

The Baldwin County association offers two fully ACA-compliant health plans, one with a \$3,000 annual deductible that starts at \$437 per month for an individual and one with a \$500 deductible that starts at \$525 per month for an individual. Both plans offer options for spouse, dependent, or family coverage. "Some members are saving thousands a month," says Dodson.

"Being able to offer health, dental, and vision insurance to our membership is one of the most defining accomplishments of my career," said Dodson in a statement.

Despite the pending federal lawsuit against association health plans, Dodson says Blue Cross assured her that Baldwin County's health insurance program wouldn't be affected, regardless of the outcome.

Among state associations, the Nevada Association of REALTORS® opened its association health plan for enrollment in January. The major medical plans, which meet the ACA minimum essential coverage guidelines, start at as little as \$226 a month, but are based on members' age.

Efforts continue on all fronts

State and local REALTOR® associations, along with NAR, are working toward meeting members' health insurance needs on a wide range of fronts with a large menu of options.

"NAR is helping state and local associations' actions, encouraging them to investigate their options because states may be able to set up plans faster than a national plan would be set up," says DeSanctis. "State and local associations that set up plans may pave the way for acceptance of a national plan down the road."

For more background and updates on this issues on this issue as it develops, visit nar.realtor/health-care-reform.

—by Carolyn Schwaar

NAR Leadership Takes a Critical Look at Governance



Is NAR's 800-member board of directors efficient, nimble, and transparent enough to act effectively in the years ahead? A new presidential advisory group aims to find out.

A new National Association of REALTORS® presidential advisory group will study what changes, if any, should be made to NAR's governance. The Governance Game Changer Presidential Advisory Group comprises more than 50 members, including 15 association executives, who will spend their three-year term gathering feedback and analyzing NAR's governance to ensure that it "supports the efficient, nimble, and transparent operation of the association; fully engages the experience, expertise, and talent of its members; and positions the association to act effectively in the years ahead," according to an NAR statement.

By "governance," NAR doesn't mean just the structure of its more than 90 member-led committees, advisory boards, work groups, councils, and forums, or its 800-member board of directors. The PAG also will critically analyze other elements, including leadership development, criteria for appointment, funding, and NAR's overall governance culture.

"Nothing within the scope of governance is off the table, and technology also is defi-

nately something open for discussion," says PAG Vice Chair Terrie Suit, CAE, CEO of the Virginia REALTORS®.

The PAG will send out surveys and offer other opportunities for feedback, including open forums at the Midyear Legislative Meetings & Trade Expo and an email address (governancepag@realtors.org) where members can send their thoughts on NAR's governance and how it can be improved.

"The leadership team really emphasized the importance of seeking broad input on this project with plenty of time for deliberation," says Suit. "We are collecting any and all input we can to incorporate into the ultimate recommendations and will be updating the membership at the midyear meetings as we narrow our findings and recommendations."

The Governance Game Changer PAG is one element of NAR's new five-year strategic framework that aims to provide a more visionary, holistic, and business-oriented approach reflective of NAR's expanding role in technology and other arenas critical to real estate.

The PAG will not delve into state and local association governance.

State REALTOR® Associations Launch Women in Real Estate Conferences

Florida REALTORS® held its first Women in Real Estate conference last August, a sold-out event featuring 2018 NAR President Elizabeth Mendenhall, NAR General Counsel Katie Johnson, 2018 Florida REALTORS® President Christine Hansen, and popular broker and speaker Leigh Brown as emcee, along with Florida REALTOR® association executives Teresa King Kinney, RCE, and Dionna Hall, RCE.

Sessions were designed to address a range of topics of interest to women in real estate including “Breaking the Glass Ceiling,” the “Path to Broker Ownership,” and “Balancing Work-Life Responsibilities.”

“Our goal was to empower women to be the best they could be in all areas of their lives,” says Hansen. “The presenters were so inspirational. They reinforced the need to follow our dreams and stay true to ourselves.”

The South Carolina REALTORS® inaugural event, which coincided with International Women’s Day last March, was billed as a celebration of women in real estate aimed to empower REALTORS® to take their careers and leadership roles to the next level. The “REAL Women: SC Women in Real Estate Conference” featured a lineup of female leaders in the industry, including Mendenhall and Pauline Bennett, president of Coldwell Banker Residential Brokerage. The \$50-per-ticket, one-day event sold out, having



Attendees and speakers at the South Carolina REALTORS® inaugural “REAL Women: SC Women in Real Estate” conference, from left: Jennifer Thomas-Feliciano, Laura Derrick, Elizabeth J. Mendenhall, Cindy Creamer, Kim Matthews, and Reah Smith.

attracted more than 300 attendees.

Both associations say their conferences were inspired by the California Association of REALTORS®’ WomanUP! Conference and Women’s Initiative outreach program focused on increasing awareness about women’s leadership in the brokerage industry. CAR’s third annual WomanUP! Conference is Oct. 24-25 in San Diego. Florida and South Car-

olina will also repeat their women-focused events in 2019.

California’s WomanUP! event is so successful, the association says, organizers are exploring offering it regionally. If you’re interested in hosting a WomanUP! event in conjunction with your REALTOR® conference, contact event organizers at womanUP@car.org.

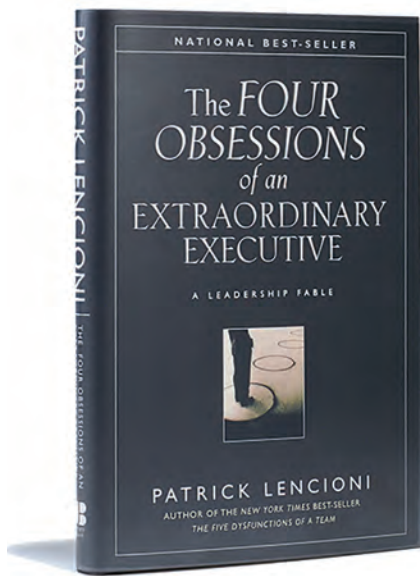


REALTOR® Emeritus Qualifications Changing

REALTOR® Emeritus, a special membership status honoring those who have maintained REALTOR® membership for 40 years or more, will require one year of service at the

national level starting in 2020. Previously, one year of service at the local or state level also qualified. 2019 is the last year REALTORS® with one year of only state

or local service will qualify. Deadlines to apply for Emeritus status in 2019 are April 2 and Oct. 2. For more, contact Mary Glick, mgllick@realtors.org.



Never Again Underestimate the Power of Leadership to Transform an Organization

Reader: Nicci Haynie, RCE, Multi-Board Manager, Texas Association of REALTORS®

Although I am an avid reader of most genres, I tend to steer clear of self-help books because I find them a bit dry. However, I recently came across *The Four Obsessions of an Extraordinary Executive* by Patrick Lencioni.

The main thing I enjoyed about this book is the parable-style tale of the value of a healthy company and how to ensure that you, as an executive, can help create a beneficial environment for your own association.

While this book, like many, is designed for the corporation, the association mirror is fairly clear when reading. In *The Four Obsessions of an Extraordinary Executive*, Lencioni's fable tells of two rival companies. One company, Greenwich Consulting, is trying to figure out how Telegraph, a firm with many similarities, manages to keep ahead in the market and demonstrate low employee turnover. The few who do leave Telegraph usually have only good things to say about it.

◁ "Success is not so much a function of intelligence or natural ability, but rather of commitment to the right disciplines."

— Patrick Lencioni, *The Four Obsessions of an Extraordinary Executive*

Greenwich is no less an industry leader and usually enjoys a great deal of success, but Greenwich's CEO, Vince Green, struggles for that success and resents what appears to be an easy time of it for the other company's leadership.

Our goals as association executives can be well-defined in trying to have the culture created by Telegraph. If we follow Lencioni's four disciplines, as he calls them, and adapt them to our own leadership, this culture becomes far more attainable.

The four disciplines offer some pretty groovy tools. I will address them and share my take on relating them to interactions within my association.

Discipline 1: Build and Maintain a Cohesive Leadership Team

Since our leadership is elected, this may seem unattainable at times. It is, however, one of the most important things we must do for our association's health. The ability to maintain cohesion is more about culture than which individual personality you may encounter at any given time. It takes a clear personal commitment from us, the AEs, to make team strength the priority. Foster trust between you and your leadership by avoiding politics, listening to their ideas, and working together to create and achieve the goals of the association.

Discipline 2: Create Organizational Clarity

With clarity comes unity. Unity in an organization brings excitement. Excitement makes an organization strong and healthy. When

members and staff share goals and have a mutual understanding of what a successful organization looks like, the association will flourish. How many of your staff are fully aware of their role in the association's strategic plan? Do your members know the strategic plan? If they do not, you may be missing a valuable component to ensuring your association's health.

Discipline 3: Overcommunicate Organizational Clarity

This discipline is pretty self-explanatory. One of the most valuable components of communication is "state, clarify, restate." This pattern lessens the likelihood of miscommunication. Keep the messages that your organization sends out as simple as possible, but make sure that you leave plenty of space for questions. Remember that everyone communicates best in their own way, so although an emailed message may reach some people, important messages should be made available on several platforms.

Discipline 4: Reinforce Organizational Clarity Through Human Systems

The strategic plan for our association is available on the website, emailed to every staff member upon completion by the leadership team, linked for members in the association magazine, and available by request. It is part of who we are and what we do as an association. Employees and members must know what the association values are. Annual reviews and new hires should be based on those core values of the association.

It is up to us as association executives to lay the foundation for our members and staff. *The Four Obsessions of an Extraordinary Executive* offers many more details on evaluating our associations and guiding them to optimal health. I recommend this book as a quick read as we prepare to head into the new year.

Honors for an AE Who Gives Back

Ana Becerra, AE at the Harlingen Board of REALTORS®, Texas, was honored at the 2018 REALTORS® Conference & Expo in Boston with the Terry McDermott Community Leadership Award for her tireless work with four local charities.

In 2016, Becerra opened a chapter of Share the Love, a national cloth diaper bank run by volunteers to provide free cloth diapers to low-income families. “The counties in Rio Grande Valley are among the poorest in the nation and I felt this was something my community could really benefit from,” says Becerra, who personally collects donations, makes necessary repairs to elastics and

snaps, and promotes the program at area free clinics, hospitals, and daycare centers.

Becerra also supports Sea Turtle Inc. by selling items, such as reusable straws, totes, and hair clips, that enable people to use less plastic, which can end up in the ocean threatening the sea turtles that nest in the South Padre Islands. Her other charity work includes mentoring youth and organizing local parenting events.



Associations Achieve Commercial Benchmarks

Nine associations recently received Commercial Services Accreditation from the National Association of REALTORS®, signifying their efforts to provide members with a high level of commercial education, services, and member engagement activities.

The Commercial Services Accreditation program is designed to help local associations build their commercial real estate services by identify their existing level of commercial member-centric offerings and chart a path toward increased services that will help them recruit more commercial practitioners to become members.

Once an association meets the required benchmarks, it is recognized with a One Star Commercial Services Accreditation Award. Associations earning additional benchmarks will achieve higher star level awards. For more, visit nar.realtor and search for “Commercial Services Accreditation.”

2018 Commercial Services Accreditation Awards

- Beverly Hills/Greater Los Angeles Association of REALTORS®, 5 stars
- Arcadia Association of REALTORS®, Calif., 4 stars
- Knoxville Area Association of REALTORS®, Tenn., 3 stars
- Central Oklahoma Commercial Association of REALTORS®, 1 star
- Michigan Commercial Board of REALTORS®, 1 star
- Scottsdale Area Association of REALTORS®, 1 star
- Texas Association of REALTORS®, 1 star
- Greater Hartford Association of REALTORS®, Conn., 1 star
- Bay East Association of REALTORS®, Calif., 1 star

Promote C2EX to Your Members

In the works since 2014, NAR's interactive Commitment to Excellence program launched at the November REALTORS® Conference & Expo in Boston and now has nearly 12,000 members participating.

The program (at C2EX.realtor) offers each member the opportunity to complete a skills assessment and receive a personalized path through relevant education, including specific action steps and tailored tools. Each REALTOR®'s C2EX journey is unique and identifies the best possible path for that particular individual toward excellence in the C2EX competencies, which range from being current and knowledgeable about laws, regulations, and legislation affecting real estate to becoming and remaining proficient in the use of technology.

As REALTORS® progress through each competency, they earn an “Excellence Badge”—a digital insignia to use in their marketing materials showing their achievement. Once they have completed each of the 10 competencies, they will receive NAR's official Commitment to Excellence endorsement. There is an additional competency for brokers.



Marketing materials for associations to use to promote the program to members, including print and online ads, are available at nar.realtor/commitment-to-excellence.

Congratulations to New RCEs, Award Winners

These 25 REALTOR® AEs earned their REALTOR® association Certified Executive (RCE) designation after an extensive course of study and exam. RCE is the only designation created specifically for REALTOR® association executives. It exemplifies goal-oriented AEs with drive, experience, and commitment to professional growth. Visit nar.realtor/rce.



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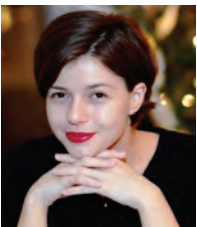
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Meghan Webber, RCE
Greater Lansing
REALTORS®, Mich.



AE Leaders of Tomorrow Young Professionals Award



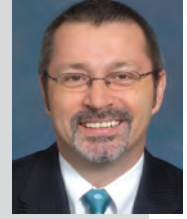
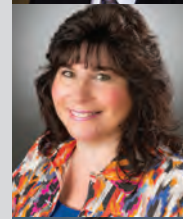
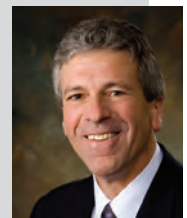
Jessica Hickok, RCE, CAE, CEO, Oklahoma Association of REALTORS® (left) and **Courtney Wilson**, a specialist in Association Leadership Development at the National Association of REALTORS®, both received the National Association of REALTORS®' 2018 AE Leaders of Tomorrow Young Professionals Award, which recognizes AEs who foster greater involvement and increased professionalism among their YPN AE peers and REALTOR® members.

AE Leadership Society 2018 Inductees

Steve Francks, RCE, CAE, CEO, Washington REALTORS® (top);

Sandy Naragon, RCE, CEO, Akron Cleveland Association of REALTORS®, Ohio; and **Steve Volkodav, RCE, CEO**, North Shore-Barrington Association of REALTORS®, Ill., were inducted into the Dr. Almon R.

(Bud) Smith, RCE, AE Leadership Society. Members of the Society are recognized as being active, ongoing leaders, innovators, and mentors for the AE community.



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ATTRACT MORE VOLUNTEERS

9 strategies for filling your committees, work groups, and task forces.



1. Offer Micro-volunteering Options

Entice members to start volunteering in small, easy steps with some short-term, one-off, and flexible opportunities. Often called micro-volunteering, these may include a shift behind the registration table at an event, attendance at a forum, or even a few turns at distributing association information via social media channels. Once members get a taste of being part of the team, they're more likely to sign on to a fuller commitment.



2. Honor, Then Invite

That little stir of envy members feel when watching peers receive applause, public recognition, and awards for their service to the association can be turned into action by having a commit-

tee sign-up table at your awards ceremonies and installation parties. Waiting even a day can be too late. Put a committee sign-up form by every chair, and most important, follow up with a phone call.



3. Get Them While They're Young (or New)

Most new members attending your association's orientation are motivated and excited to be part of the organization and are especially attracted to the networking aspects of volunteering, so there's no better time to sign them up to a committee or work group. Yes, chances are high that they may not follow through with the commitment because of challenges they face establishing themselves in the industry. Plus, they may not have enough experience to contribute on higher-level committees, such as strategic planning or finance. But association executives say their enthusiasm, energy, and fresh perspectives often outweigh their shortcomings. Establish a culture of

contribution early on, and you may have a volunteer for life.

At every member orientation, include an overview of volunteer opportunities delivered by a passionate board member or your association president live or in a video. Include a simple sign-up card in new-member materials that lists all your association's volunteer opportunities.



4. Enlist Leadership to Identify & Recruit Others

Perhaps the most tried-and-true way of boosting volunteer ranks is to have association volunteer leaders approach their peers, colleagues, and agents with a personal appeal. After all, it's their association, and most AEs put leadership recruiting squarely in the members' hands.

When asked "Why do you think members don't volunteer?" most AEs responding to RAE's survey indicated that members who don't volunteer just are not engaged with the association in any way. For those members who do not read association communications or

attend events, the only way to reach them is often through the members they do transactions with or share an office with.

Make it as easy as possible for your leaders and committee chairs to recruit new volunteers. Provide scripted emails and texts for leaders to send, post detailed committee descriptions with estimated commitment hours on your website, have an easy sign-up form, and challenge each leader to bring in at least one new volunteer a year with a prize for the recruiter who brings in the most volunteers.



5. Post the Volunteer Easy Button

Association surveys show that many members don't volunteer because they don't know where to start. Calling the association office and asking how to volunteer sounds easy to an AE, but to a member it can be intimidating. Members often think they're not qualified or that they're not in the "in crowd" and won't be welcome. That's why posting a call for volunteers, with clear instructions, on your website

and social media channels, in your newsletters, and in your publications is so important. Do you have an entire webpage devoted to volunteering including opportunities, testimonials, a volunteer job description, and a sign-up form? Do you use taglines on all staff correspondence inviting members to volunteer?



REALTOR® Assoc. of Sarasota and Manatee

Photo by Bob Massanowa

6. Host a Committee Fair

Committee fairs, often held in conjunction with membership lunches or other events, include information tables staffed by members presenting details on what the group is responsible for. Breanna Vanstrom, RCE, CEO of the Boise Regional REALTORS®, says her committee fair yields about 15 new volunteers a year who probably wouldn't have come forward had the association not been proactive. "Our annual Introduction to Leadership event attracts members who are mostly interested in association leadership but didn't know where to get started," she says. "We usually have them volunteer for a committee as a first step and tell them about all of the opportunities we offer."

Attendees at the Hampton Roads REALTORS® Association's (Va.) committee fair receive a passport to have

stamped at each council or committee, to be entered for prize drawings.

Encouraged by the success of its inaugural event in 2018, HRRRA decided to make the fair into an annual event. "We were able to educate members who may not have realized exactly what certain councils or committees actually did, how the members could benefit from engaging with these groups, and that they were able to participate to gain leadership experience and influence the direction of their association," says the association's Executive Director, Cathy Crossfield.



Northern Wasatch Assoc. of REALTORS®, Utah

7. Target Skilled Members With Custom Opportunities

The more you know about your members, including their past jobs, formal education, and experiences, the better you can target individuals for specific volunteer opportunities. Today's association management and volunteer software (see p. 16) can help you gather and cross reference members' skills to your volunteer needs. Members with accounting experience are clear candidates for your finance committee, and those with a declared interest in community service are perfect for your outreach committee. Approaching members with volunteer opportunities tailored to their

strengths and interests is more likely to be successful.



8. Points & Awards for Volunteer Participation

Your members probably have a few rewards cards in their wallet, so they know how the idea works: Every time members volunteer, attend a meeting or class, or participate in an event, they get points. At the end of the year, award a prize for the member with the greatest number of points, or allow members to use points toward raffle tickets, dues credits, or other incentives.

"I am hearing some good things from the membership about our new Points for Participation program," says Sue Pyzynski, AE at the Mid-State Association of REALTORS® in Connecticut. A list of points opportunities is on the association's website, and at the end of the year, points are converted into dollars that can be used to bid on prizes.

Amy DuBose, RCE, AE at the Bryan-College Station Regional Association of REALTORS® in Texas, launched a punch-card rewards program last year. "One punch for every event, class, committee meeting, etc., attended. Eight punches complete the card, and it goes into a quarterly drawing for \$100. All cards go in an end-of-the-year draw-

ing for one year's worth of dues," she says. The punch card also eliminates the often-daunting task of tracking points.

At the REALTORS® Association of Southwestern Illinois, AE Deb Treat Frazier, RCE, offers "RASI bucks" that members can earn for attending events and volunteering. "They can use them for CE courses, events, or at our REALTOR® store," she says. "We put our current president's picture on the bucks."



9. Promote the ROI of Serving

REALTOR® volunteers routinely say that they get more than they give. Use their words in your communications to promote the return on investment of serving on an association committee. Here are just some reasons members say they volunteer: I make more money through the contacts I found volunteering, I can work from inside to enhance my REALTOR® association, I feel good about serving an important cause, I want to give something back to my profession, I want to build my resume with new positions and skills, I enjoy the personal satisfaction of helping others, I'm able to amplify my voice for change in my community, I've learned new skills I can apply to my business, and I've gotten to know and serve my local community even better.

OPTIMIZE YOUR GOVERNANCE STRUCTURE

If you're finding it hard to attract and retain smart and motivated volunteers to serve on your association board and committees, part of the problem could be your governance structure. Poor governance structure can leave members feeling undervalued, underused, bored, siloed, or even overwhelmed. According to an ASAE study*, these five actions have helped many associations create a more efficient and effective governance environment.

1. Simplify bylaws and rely more on ad hoc task forces to bring flexibility (and speed) in decision making.

2. Meet more often to maintain the pace of change. This may also involve video or teleconferencing.

3. Use volunteers' time more wisely, with more carefully structured meetings.

4. Recruit and prepare board members more carefully to ensure that they bring more than just representative value.

5. Invest in self-education and self-evaluation (e.g. leadership training and experience surveys).

Board of Directors

Focus: Providing foresight, oversight and insight into association programs, products, and services. As the governing body of the organization, the BOD establishes overall policy and management directives.

Composition: Structure, including size, term limits, and election process, can vary but should be outlined in bylaws and include the minimum number of directors required by state law. Elected members typically serve a one- to three-year term and board size should be large enough to adequately represent all members. Individuals serving as directors or officers owe fiduciary duties to the organization, which include care, loyalty, confidentiality, and obedience.

Meets: At least quarterly, often monthly.

Committee

(Standing or special)

Focus: Making recommendations to the board of directors and helping shape specific

member services, such as education or consumer outreach. Most REALTOR® associations have these four committees established in bylaws: executive, budget and finance, grievance, and professional standards.

More committees can be appointed by the BOD and president, and state laws may require nonprofits to maintain certain standing committees.

Composition: Created and defined in bylaws or association policies. Committee chairs may be appointed by the president or BOD, or elected by committee members in accordance with the bylaws. Committees can create subcommittees with approval of the BOD.

Reports: Committees often recommend policy matters to the BOD.

Meets: Typically monthly.

Council

(also known as a REALTOR® business activity)

Focus: These groups, such as an Appraisers Council or a Property Management Council,

identify and address the unique needs of specialists among the membership and develop programs to meet their needs and increase their participation in the association.

Composition: Typically created and defined in bylaws. Consists of specialty practitioners and others. Chair may sit on the board of directors.

Reports: To the BOD.

Meets: Only as necessary.

Advisory Group

(also known as a task force, special committee, action team, or work group)

Focus: Assisting leadership, a committee, or staff on a single, narrow responsibility, specific association program, product, or service. For example, a Leadership Academy Advisory Group. The purpose is specific and a written charge should be provided by the overseeing committee or BOD.

Composition: Ideally members come from a wide variety of areas with experience or expertise on the issue of focus.

Reports: Seldom generates policy recommendations but reports back to the committee, BOD, or leadership team on the specific issues assigned to it.

Meets: As needed. Advisory groups tend to continue from year to year but can be dissolved when the reason for their existence is no longer part of the association's plan.

Forum

Focus: Disseminating information and encouraging discussion among members. BOD and committees should take forum feedback into consideration when making recommendations. Forum examples include a technology forum or public issues forum.

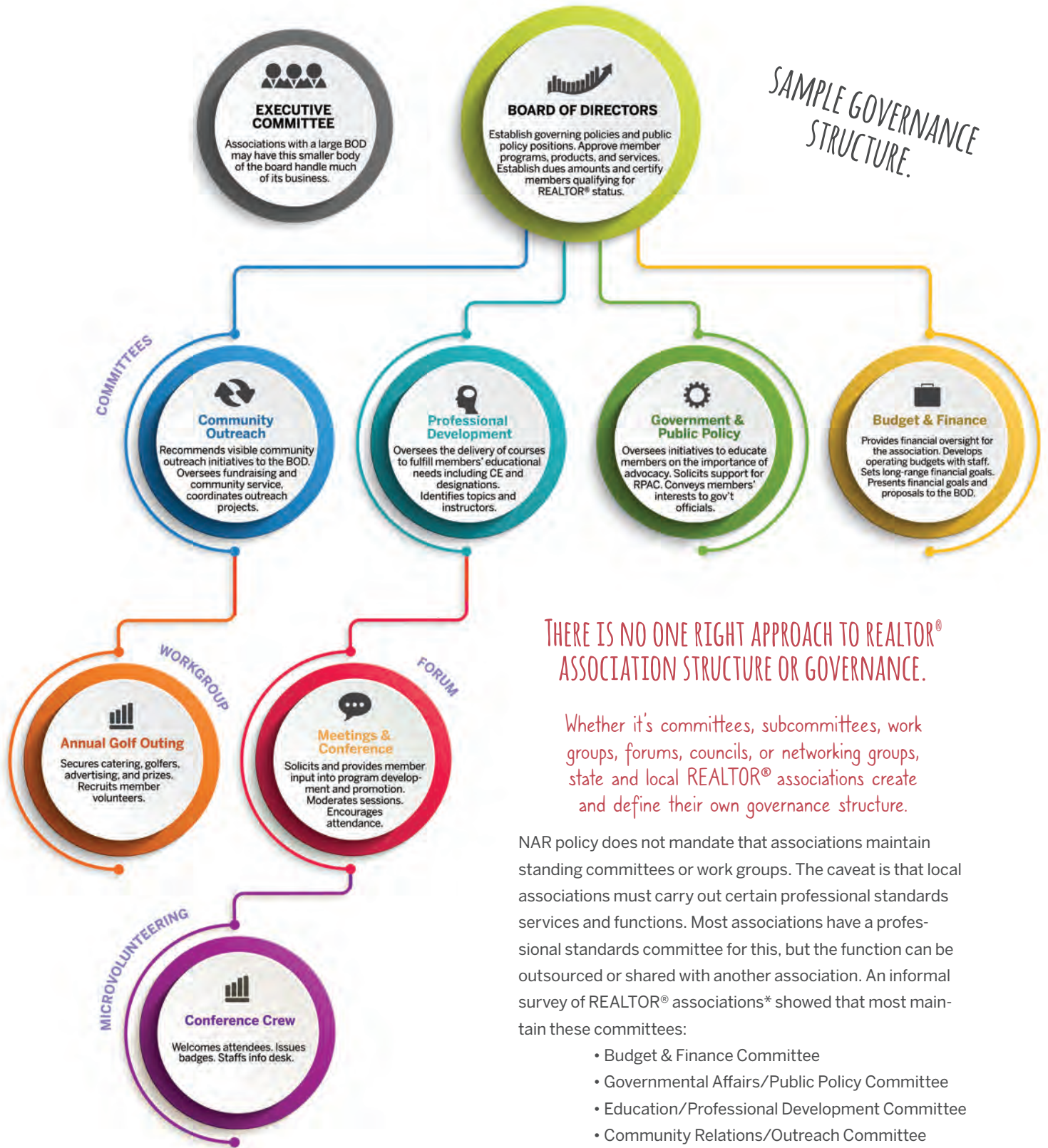
Composition: Usually open to all members with an interest in the focused topics. Attendance is not typically recorded.

Reports: Provides feedback of discussions to the full committee or BOD. A forum typically does not make recommendations, but provides input.

Meets: Only as necessary.

* Associations Now, "Getting to Good Governance."

SAMPLE GOVERNANCE STRUCTURE.



THERE IS NO ONE RIGHT APPROACH TO REALTOR® ASSOCIATION STRUCTURE OR GOVERNANCE.

Whether it's committees, subcommittees, work groups, forums, councils, or networking groups, state and local REALTOR® associations create and define their own governance structure.

NAR policy does not mandate that associations maintain standing committees or work groups. The caveat is that local associations must carry out certain professional standards services and functions. Most associations have a professional standards committee for this, but the function can be outsourced or shared with another association. An informal survey of REALTOR® associations* showed that most maintain these committees:

- Budget & Finance Committee
- Governmental Affairs/Public Policy Committee
- Education/Professional Development Committee
- Community Relations/Outreach Committee
- Professional Standards Committee
- Grievance Committee
- RPAC Fundraising Committee
- MLS Committee
- Bylaws & Policy Committee
- Strategic Planning Committee
- Awards/Recognition Committee

* 106 AEs responded to a survey posted in the REALTOR® AE Facebook group, AEI Year-Round, in November 2018.

Good Sense Governance

A library of resources about best practices on a variety of association and MLS governance and operations topics, including governance models, fiduciary duties, elections, BOD qualifications, and much more, is available at nar.realtor; search for "good sense governance."

Tech Tools to Better Manage Committees

There are tools for every budget and level of tech knowledge to help you get the most out of every volunteer.

Signing up volunteers, assigning them to committees, and tracking committee progress can be labor-intensive endeavors—especially if you’ve introduced a wide variety of micro-volunteering and one-time task force options—but technology can help make these processes faster and easier and help you keep track of all of your volunteers.

Committee Sign-up

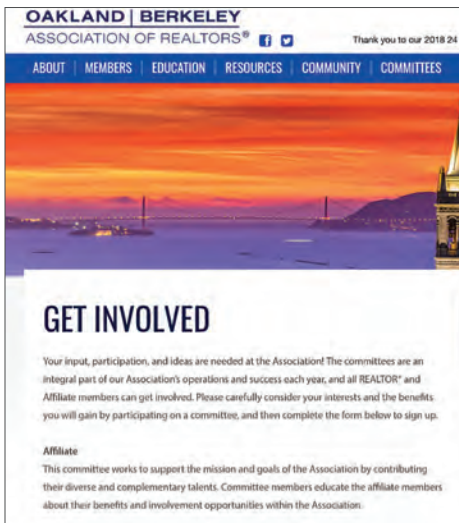
For association committee and volunteer sign-up to be as quick and easy as possible for members, your tech tools need to be intuitive and work on mobile devices. They should also enable you to provide committee descriptions, gather some details about vol-

unteers’ background, and export that data to a spreadsheet or, ideally, directly into your membership management software.

There are dozens of quick and free sign-up forms online you may already be using for other purposes (Doodle, Wufoo, Survey Monkey, Google Docs); some are specialized, such as SignUp.com and SignupGenius.com. Watch out for free apps that limit the number of custom questions you can ask, block links to your website, limit the number of administrators, or include advertising. Paid versions, usually starting about \$10 a month, can offer more features and less hassle.

Taking sign-up a bit further are specialized software options. One, ivolunteer.com, is a customizable, reusable sign-up platform that enables you to create a good-looking, detailed volunteer opportunity homepage listing all your committees, events, forums, and resources. The free subscription is good for up to 15 volunteers. A premium subscription for up to 500 volunteers costs \$175 for six months.

As with any time you are engaging with members, use committee applications as an opportunity to capture more data about their interests. Ask them about relevant background experience, previous jobs, or special skills they have. To avoid unexpected dropouts, provide information about committee attendance requirements, estimated time commitments, and other reservice requirements on your sign-up app.



Many REALTOR® association websites, such as the Oakland/Berkeley Association of REALTORS®’s pictured above, feature a detailed “Get Involved” webpage listing committee descriptions and including an embedded sign-up form.



The Orlando Association of REALTORS® online committee sign-up page (pictured above) is built on the app Wufoo.

Committee Management & Collaboration Tools

There’s a wide range of team collaboration tools on the market, free and paid, that also work well for committees and work groups as a platform where they can discuss and share documents anytime from anywhere.

The popular Basecamp project management and daily task tracking application, which has millions of users, costs about \$90 a year with a 10 percent discount for nonprofits. Some of the benefits of Basecamp include the ability to silo volunteers to have access to just the data and documents relevant to their committee or task force or even a single event, while giving committee chairs and leadership wider access to private discussion spaces and documents. Basecamp is simple enough for the masses to use and there’s no shortage of how-to videos on YouTube if volunteers get stuck.

Similar to Basecamp are Trello, Asana, Jira (for highly tech-savvy members), Podio, and Zoho. Many of these have a free basic version and paid upgrade versions.

Many of these platforms enable you or your committee chairs to automate tasks including scheduling meetings, emailing meeting or task reminders, and distributing minutes, agendas, and reports. Some

Many of these platforms enable you or your committee chairs to automate tasks including scheduling meetings, emailing meeting or task reminders, and distributing minutes, agendas, and reports.

facilitate voting as well as instant message and video chat.

If you're ready for a more robust volunteer program management platform featuring a menu of tools for attracting, managing, training, and retaining volunteers, take a look at Samaritan's eCoordinator. One useful feature enables volunteers to sign up and search for the best-fitting opportunities using attributes (including duration, qualifications, or theme), a calendar, or an interactive map. Automatic emails suggest volunteer matches as they're posted and remind volunteers about meetings. The platform also includes volunteer satisfaction surveys and questionnaires. Product packages start at \$2,500 per year plus setup and training.

Another category of collaboration platforms specifically designed for membership associations, or those with a large number of associations as clients, including Higher Logic and Get Connected, emphasize how member collaboration builds membership value. These solutions not only can be used to manage committees but also facilitate member-to-member online networking and discussions on specific topics, similar to setting up a Facebook group. (Although Facebook has the advantage of being widely used by members, for committee collaboration, it lacks the security and privacy of other



Committee Meetings Via Video & Audio Conferencing

Video conferencing has come a long way from the frozen and blurry images of just a few years ago, and offering this option can lead to increased volunteer participation.

Although Skype is still the industry leader and its group video conferencing capability is applicable for committee meetings (if your bylaws permit it), there are other alternatives for group video meetings. Free options that members may already be accustomed to include WhatsApp and Facebook Messenger, which both enable group chats, and a newer offering from Amazon called Chime, which is getting a lot of attention for being easy to use.

More sophisticated video streaming and live-screen sharing platforms include Cisco WebEx, BlueJeans, Wire, and Telegram.

solutions.)

The National Association of REALTORS® launched its Higher Logic Hub collaboration tool in 2018. It replaces the email, closed Facebook groups, and project management platforms previously used by NAR committees, presidential advisory groups, advisory boards, councils, work groups, the board of directors, and select other association leadership groups.

"The Hub has provided our members a secure and unified platform where they can connect and collaborate on committee work and important topical issues between meetings," says Idis Rivera, NAR's director of governance programs.

I Don't Want Another App!

The biggest decision when it comes to selecting software is often deciding between a new, focused, and elegant solution or a platform you already have that also gets the job done. How proficient are you, your staff, and members at using new software? If your an-

swer is not positive, consider using the tools built into platforms you already use. Will your event registration software also work for committee sign-ups? Can you integrate a sign-up form into your WordPress website? How about using NRDS or ZipForms for committee sign-up?

For committee management, many associations use RAMCO, the Microsoft-based REALTOR® Association Management System Cooperative platform. Mike Cutlip, the director of RAMCO, says the committee functions in the platform includes sign-up, setting criteria for sign-up, automated communication with committee members and volunteers, attendance tracking, and easy integration with Higher Logic and other platforms to expand your committee management abilities.

Regardless of the technology you choose, free or paid, strive to make volunteer sign-up and management as easy and transparent as possible for members and leadership.

—by Carolyn Schwaar

What if the Economy Tanks?

Plan now to keep your association healthy and members supported through the next downturn.



If you were an AE in 2007 (the year of the economic collapse) you probably haven't forgotten the drop in membership numbers that dragged down your revenue and spelled the end to a long list of programs and services. You remember the emergency board of directors meetings to authorize use of reserve funds and the creative ways you had to cut spending. You lost staff; maybe you took a pay cut.

All that is just a blurry memory in today's booming economy and robust real estate market. But don't be caught off guard. Those REALTOR® associations in 2007 that had sound financial policies, prudent investment of reserve funds, and a contingency plan for economic sluggishness fared well through the great recession; many others did not.

Now is a great time to take stock of your plan (or write one) for the next, inevitable downturn.

What's your contingency plan?

Your members, directors, and leadership fully expect you to have a plan for steering your association through a recession. Not having a plan could be viewed as irresponsible or, worse, a career-ending failure to exer-

cise due care. Entering a recession without a thoughtful, comprehensive plan can lead to hasty decisions, inefficiencies, and costly delays.

The size of your association will dictate the complexity of your plan, but every association should have one. At its most basic, an economic contingency plan details what steps your association will take to ensure the financial stability of the organization. It addresses where spending will be cut by prioritizing association services and programs.

The plan should outline a comprehensive menu of cost-saving initiatives that could be implemented in the event of a downturn. These might include reductions in travel, events, education, marketing, consulting fees, community support, charitable giving, personnel, or even salaries. They also might include suspending or discontinuing certain services or programs or charging a fee for them. Cost savings may also include delaying capital expenditures, such as new computers or furnishings, or selling assets such as property or vehicles. Your plan may also address alternative revenue-generating

ideas including renting out association property or offering fee-for-service business support.

A vetted, predetermined contingency plan saves precious time when the day comes to implement it. Plus, when association leaders are involved in the plan's development and approval, there is a broader base of support for its execution. That support base leads to more efficient implementation, making your job easier.

Reserve funds: How much is enough?

Although how much to have stocked away will be different for every association, many follow The Seven Measurements from the American Society of Association Executives, which has become the benchmark for a large portion of the association world. According to The Seven Measurements, the formula—or minimum goal—recommended for associations is 50 percent of annual operating expenses. For example, an association with

Your financial contingency plan should outline a comprehensive menu of cost-saving initiatives that could be implemented in the event of a downturn.

\$100,000 in annual operating expenses would strive to maintain at least \$50,000 in operating reserves at all times.

REALTOR® associations often strive for more than the minimum and how much, exactly, should be spelled out in association policy.

Consider what other associations do, consult financial experts, and then have an in-depth dialogue with leadership to determine how much is needed to reach a collective level of comfort.

Update your policy on spending reserves

Some AEs say their members want reserves used for lowering dues in tough times. Other AEs say their members would rather see deeper cuts in programs, services, and operating expenses before resorting to tapping into reserves. Save a lot of debate and discussion at critical times when tensions are high by writing a reserve policy today that prioritizes how to spend reserves.

A good reserve policy, experts agree, addresses investment practices and guidelines for use of principal and yields once the benchmark amount has been reached and maintained. For example, after your minimum balance is achieved, will the yields be used for capital improvements, spent on new program development, saved for one-time unexpected expenditures, or used for something else?

Your reserve policy and reserve levels should be reviewed annually by the finance

committee, which can make recommendations to the Board of Directors, as necessary.

Tell members how you're helping

Even the most well-thought-out contingency plan can fail if it's not transparent or not communicated effectively to members. As the last downturn showed, members who are struggling economically can become critical of each dues dollar spent. Some may resent your stable paycheck and fail to see your empathy with their situation. After the last financial crisis, some association executives volunteered to take a pay cut or pay freeze even though their associations were actually in a safe financial position. Many inauguration balls and holiday parties were canceled or scaled back in solidarity with members, not out of association financial necessity. Associations also established benevolent funds during the last downturn to aid members in financial hardship (see the Benevolent Funds Toolkit at nar.realtor).

If you've planned well, your association can weather the next downturn without much disruption, but the same may not be true of your members' businesses. Plan now for how you can help members through the tough times with education focusing on doing more with less or cutting business expenses, a new menu of free services, or a temporary dues reduction.

Make sure your contingency plan is ready when the time comes—and it will come.

—by Carolyn Schwaar

Save a lot of debate and discussion at critical times when tensions are high by writing a reserve policy today that prioritizes how to spend reserves.

Get Help Drafting a Financial Contingency Plan

As with your business plan, strategic plan, and crisis management plan, hiring a planning professional to guide you and your leadership through the stages of crafting a financial contingency plan is ideal. Whether it's your association accountant, a financial consultant, another AE with experience, someone from your local college or university, or another type of facilitator, make sure the individual is familiar with how a membership organization operates and the role of bylaws and policy in its management.

These titles and many others are available free to AEs as e-books through the National Association of REALTORS® library. Visit nar.realtor/association-budgets-and-reserves.



Your Advocacy Needs Are Covered

The REALTOR® Party offers state and local associations a menu of new programs, resources, and grants.

The REALTOR® Party's combined federal, state, and local advocacy operations now provide associations with a host of new opportunities and resources. Take advantage of the new programs for 2019 designed to address the advocacy needs of all sizes of REALTOR® associations, both rural and urban, and all levels of political savvy.

► New in 2019

Rural Outreach Program

This program will reach out to rural REALTOR® associations to help them identify issues and community needs that they could address using REALTOR® Party resources, especially community outreach resources.

Urban Training Initiative

The local REALTOR® associations representing the largest 50 cities in the U.S. account for one-third of NAR's membership and face their own opportunities and challenges. These associations will receive specialized education, training, and research to help meet their needs.

Advocacy Graphics Warehouse

NAR will create a two-way online portal for NAR and state and local REALTOR® associations to upload and share graphics that can be downloaded and reused.

FPC Advocacy Academy

This intense and interactive training program would be required for all new federal political coordinators. All FPCs will be expected to participate in this program when they onboard in a new congressional cycle.

REALTOR® Party Social Media Ambassador Program

Leveraging the social clout of REALTORS®, NAR will provide a monthly menu of shareable advocacy related content (infographics, videos, tweets, and posts) with selected REALTORS® to amplify NAR's advocacy voice. Content will reside on the REALTOR® Party website for ambassadors to download and share on their personal social media profile pages.



Plan a 50th anniversary of RPAC event at your association with planning resources at realtorparty.realtor/rpac.

All-Star Speaker's Bureau

Representatives of the REALTOR® Party Member Involvement Committee will be available as experts on all areas of advocacy and the REALTOR® Party to speak to your state and local association meetings.

State Key Political Training Grant

This grant will provide resources and consultant expertise to help state associations create a REALTOR® grassroots advocacy

program patterned on the successful Federal Political Coordinator program. The grant could also be used to bolster existing programs with training and educational resources.

Consumer Advocacy Outreach Grant

This grant assists local and state associations with creating consumer advocacy activities or campaigns. Grant funds can be used on consumer awareness (before an issue campaign) or consumer education (after a legislative victory), and can be used to develop materials such as videos, infographics and social content.

Transforming Neighborhoods by Addressing Vacant Properties

This program will offer specialized in-person training to REALTORS®, elected officials, municipal staff, and housing and neighborhood advocates to address the problems of vacant, abandoned, and blighted properties.

Comprehensive Approach to Community Outreach Activities

The largest local associations (those with more than 15,000 members) can propose a comprehensive bundle of community outreach for NAR funding rather than applying individually for grants or program assistance.

New REALTOR® Party programs for state and local associations, along with existing programs, are detailed in the REALTOR® Party Resource Guide at realtorparty.realtor.



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- Elizabeth Hiatt, Newman-Coweta Board of REALTORS®
2018 Leadership Summit, Chicago

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The principles by which you manage your organization are reflected in your staff and members and underpin every decision you make.

“The supreme quality for leadership is unquestionably integrity. Without it, no real success is possible, no matter whether it is on a section gang, a football field, in an army, or in an office.”

— Dwight D. Eisenhower, 34th president of the United States



My fellow AEs and CEOs regularly share stories about members and leaders who work within their association for personal gain rather than on behalf of the organization. Facing these situations can leave us feeling battered and torn, and it can be hard to stay focused and on course. Couple this with so much in the news about our national leaders and public figures taking shortcuts and exhibiting anything but a strong moral compass, and staying the course of integrity can feel like a losing battle.

It doesn't have to be.

Through my own experiences and those of my colleagues, I realize how certain moments can be challenging—and how facing them with strong integrity is empowering and rewarding.

A fellow CEO recently shared a story about a member who attempted to bully her way into a leadership academy facilitator position by using her seat on the selection

committee to promote herself. “Politically speaking, we could have turned a blind eye and not ruffled a lot of feathers,” my fellow CEO said. “We could have simply ignored this obvious breach of fiduciary duty in order to avoid hard feelings. But as staff, we chose the high road and stuck to our guns. But it's never fun being ‘the bad guy.’ It's not a place we want to be, but we have to stand up for what's right.”

We, as AEs, face these situations every day. These are the moments when your indisputable integrity comes through. Those questionable characters may not like it, but leaders and members will respect you more for it. It may feel daunting, but it is up to us to demonstrate professionalism and help raise the bar within our organizations.

More than what integrity signals to our leadership and members, I challenge that it means more to our staff than anyone else. This helps them understand that you won't waver when it comes to the hard stuff.

We all know a professional, whether it's a colleague or someone on our leadership team, who is inconsistent in the way he or she approaches certain situations. It's hard to know where you stand when someone bends with the wind.

A colleague from Texas shared: “Before being named AE of my organization, I was a staff member in our professional development department. My predecessor and previous boss had a reputation of being unpredictable. When it came to fines under the MLS, my boss would often waive them depending on who the member was. Staff members didn't know what to expect day to day and it was apparent that not all rules applied equally. I've made it a distinct point to treat every situation the same, no matter what. I feel that staff members are more comfortable approaching me about situations with members. Through my approach, I feel I have won their trust. This has changed the personality of our organization and the experience members are having, as well. Members and staff alike have noted the difference, and that feels good.”

These situations happen at all levels and at all sizes of organization, but it may be more difficult for newer AEs or for those at smaller associations. Yet showing daily that we hold integrity, consistency, and fairness in high regard is crucial. If enough staff, leaders, and members see your integrity and trust it, then they will start to practice it.

Great leaders do the right thing, even when no one is watching. When we are true and authentic to what is important to us and what our moral compass says, then we are always in the right.



Amy Dubose, RCE, is the AE at Bryan-College Station Regional Association of REALTORS®, Texas. Contact her at 979-846-3751 or ae@bcsrealtor.com.



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**NATIONAL
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Legal Action Committee: Nationwide Impact

REALTOR® volunteers help NAR defend and support the industry through court cases.

As the NAR attorney assigned to staff the Legal Action Committee, I have the pleasure of working with NAR members, association executives, and state and local association counsel and general counsels, all committed to supporting legal cases that could have a broad impact on the real estate industry.

The Legal Action Committee receives and evaluates requests for assistance in litigation of significance to NAR, state and local associations, the real estate profession, ownership and use of real estate, and private property rights.

NAR-supported cases have led to legal precedents established on topics including MLS copyright, antitrust, sign ordinances, fair housing, rent control, and eminent domain. To receive assistance, a case must show that it's likely to have a substantial effect, directly or indirectly, on the real estate industry.

NAR's Legal Action Committee has approved more than \$1 million in funding for state and local REALTOR® association lawsuits in just the past few years. It has supported hundreds of cases since 1973.

New members must have participated in a state association-level legal action committee prior to NAR's Legal Action Committee.

In some cases the REALTOR® association is the defendant, such as when a member sued the South Carolina Association of REALTORS® over an arbitration award. In other cases, the association is the plaintiff, such as when the St. Louis Association of REALTORS® sued St. Louis County, Mo., challenging a residential rental property licensing ordinance. Many cases do not involve REALTOR® associations, but rather, brokerages, MLSs, advocacy organizations, municipalities, or other entities.

Committee Insights

Committee membership is a volunteer position, and interested applicants must comply with NAR's committee application process. New members must have participated in a state association-level legal action committee prior to NAR's Legal Action Committee. The NAR president-elect makes the appointments for any vacancies occurring during his or her presidency, and the NAR first vice president appoints the vice chair.

The committee meets semiannually during NAR's REALTORS® Legislative Meetings in May and the REALTORS® Conference and Expo in November. New committee members are invited to the November meeting before their term to observe how the committee functions. During these committee meetings, associations, members, or other parties present their requests for assistance (after first having submitted a request form, which is available on nar.realtor). After hearing the request, the committee makes a recommendation to the



NAR filed "friend of the court" briefs in several cases before the U.S. Supreme Court that resulted in important victories for real estate.

Board of Directors on financial assistance in appropriate cases. In between meetings, members communicate through the Hub, NAR's communication platform that ensures committee members are able to connect while keeping a record of those discussions.

If you think your association may have a case that warrants legal action assistance, download the Legal Action Program Request Form at nar.realtor, and return it to me at checht@realtors.org. You can apply for support at any stage in your case. Be sure to explain in your application how your case may affect the real estate industry nationally. Parties seeking assistance are strongly encouraged to present the case to the committee in person or via phone conference. Keep in mind that any funds awarded may be applied only to the applicant's legal fees and expenses. They may not be used to pay judgments, damages, fines, settlements, or opposing counsel legal fees.

For more on the Legal Action Program and an application for assistance, search Legal Action Committee on nar.realtor.



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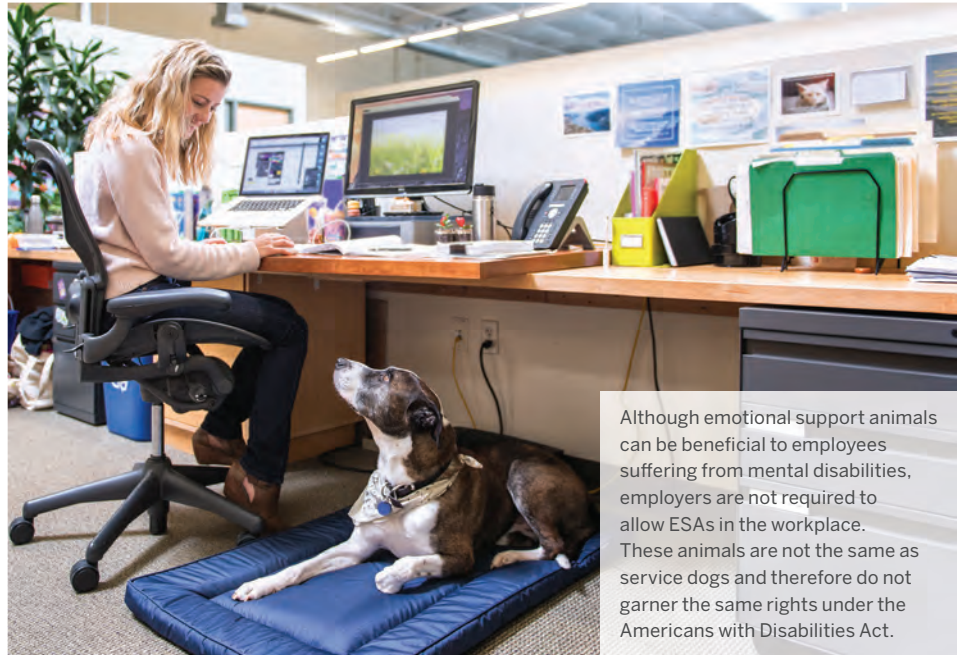
Accommodating mental health disabilities in the REALTOR® association workplace.

A staff member asks to bring an emotional support animal to work because it helps alleviate their stress. Do you have to consider this? It depends.

When most of us think about the Americans with Disabilities Act, we think of physical disabilities and accessibility. We have complied with the requirements of the act relating to physical disabilities with modified entrances and exits to our offices to allow easier access for people who use wheelchairs. We have updated our job descriptions to include mobility and sensory functions essential to a job. However, many of us don't realize that the ADA amendment that took effect in 2009 includes mental health.

The challenge this presents for employers is that psychological issues can be difficult to identify. Examples of diagnoses include depression, social anxiety, generalized anxiety, obsessive compulsive disorder, posttraumatic stress, binge eating, antisocial personality disorder, and general personality disorder. Because of mental health stigma, some employers may be skeptical of a diagnosis. To make matters more complex, the request for mental health accommodation may have been brought forward by an underperforming employee.

According to the Substance Abuse and Mental Health Services Administration, it is estimated that more than 18 percent of American adults suffer from mental health issues. And mental health issues are esti-



Although emotional support animals can be beneficial to employees suffering from mental disabilities, employers are not required to allow ESAs in the workplace. These animals are not the same as service dogs and therefore do not garner the same rights under the Americans with Disabilities Act.

mated to be increasing.

The ADA requires reasonable accommodation for mental health disorders accompanied by what is called an “interactive process,” which includes several steps such as considering an employee's requests, investigating options, and evaluating the effect on the workplace. For example, consider a diagnosis of anxiety. An employee might request coming in late or leaving early or working from home to avoid the stress of the commute or working fewer hours to reduce stress. Other options might include restructuring the job so that the employee handles only one task at a time; for example, a receptionist who is responsible for a large volume of incoming calls, making copies, ordering supplies, and handling mail might propose the following daily morning routine with a similar structure for the afternoon:

- open mail from 9 - 9:30 a.m. only
- answer calls from 9:30 - 10:30 a.m. only

- make copies from 10:30 - 11 a.m. only
- order supplies from 11:30 - noon only

The question is whether this is reasonable in light of the essential functions of the job and whether the job description says anything about multitasking.

What about an employee suffering from depression? Accommodation requests might include a flexible schedule, job restructuring, supervisory methods (meeting with the employee more or less frequently, encouraging the employee to let the supervisor know when something is unclear, providing oral and written instructions), additional time to complete work, job coaches, periodic rest breaks, a support animal (such as a dog or cat that provides therapeutic benefit, such as alleviating or mitigating some symptoms of the disability) or support person (a dedicated person to help keep them focused, assist with minor daily tasks and help them operate in social

environments in which they may not feel comfortable, such as meetings).

When it comes to accommodating an employee's mental health condition, the possibilities are endless—and so, too, are the possibilities for abuse. Even if these accommodations sound reasonable, consider that you are prohibited from discussing any of this with your other employees because of privacy expectations. Your remaining staff may not understand why this one employee has an emotional support animal or comes in late and leaves early and why they can't do the same.

What does this mean for association management?

Two things. You will want to ensure that you understand the requirements of the ADA and review your job descriptions. To review job descriptions consider the knowledge, skills, and abilities needed to do the job, along with any physical characteristics, credentials, experience, and environmental factors required. These factors include things such as the ability to multitask, manage multiple priorities, and regulate emotions.

Accommodation requests could show up with a newly hired employee who was reluctant to reveal a disability during the interview process. Current employees can request an accommodation at any time it becomes a known need. Once an accommodation is requested, employers are required to go through the interactive process. This means hearing the employee out, usually by meeting in person, and then following up in writing to document what was discussed and the employer's justifications for their action.

Document the facts of the meeting in an email with a delivery and read receipt. It's a good idea to close the email with a statement similar to the following: "I believe this accurately reflects our discussion regarding your request for accommodation. If there is anything in this email you think does not accurately reflect our discussion, please let

me know by tomorrow at close of business, or I will assume you agree."

The employer must decide whether the requests are reasonable in terms of monetary and staff resources, and consider other options that do not have undue burden or hardship. When it comes to animals, it's important to note the employer is obligated to thoroughly investigate how the animal may impact the workplace. The employer should not assume or guess those impacts. The employer must be able to justify decisions made with the understanding that these decisions could ultimately be reviewed in a courtroom by a judge or jury. Although this can be daunting, and the ADA makes significant requirements for employers, the employee must be able to perform the essential duties of the position with or without accommodation.

Employers can request sufficient documentation when the disability or requested accommodation is not readily known or observable, as is typically the case with a mental health issue, but medical documentation is not required by the ADA. Another option is to choose a doctor to conduct an independent medical examination. In this case, the employer pays for the independent evaluation. An independent medical examination may provide employers with different options for reasonable accommodations—for example, taking frequent rest breaks rather than working from home.

Finally, employers should review their job descriptions to ensure that they reflect the range of cognitive functions required. Otherwise, the employer is leaving a medical professional with the opportunity to make subjective interpretations of the position requirements. Cognitive tasks include: analyzing, counting, concentrating or focusing with frequent interruptions, summarizing; interpreting written data; synthesizing information from multiple sources; writing summaries or abstracts; interpreting written or verbal instructions; summarizing or re-



When it comes to accommodating an employee's mental health condition, the possibilities are endless—and so, too, are the possibilities for abuse.

Depression and anxiety disorders cost the global economy \$1 trillion each year in lost productivity, according to a World Health Organization–led study. Flexible hours, job redesign, addressing negative workplace dynamics, and supportive and confidential communication with management can help people with mental disorders continue to or return to work.

sponding verbally; and recognizing social or professional behavioral cues.

A job description that includes cognitive abilities and executive functions may include language such as the ability to perform a variety of duties, often changing from one task to another, or the ability to interact appropriately with colleagues for different purposes in different contexts. Such a clearly written job description helps a medical provider determine accommodation strategies that are reasonable regarding the essential functions of the position. Imagine how difficult accommodation strategies might be if cognitive abilities were not included in the job description.

If you have any questions or would like assistance reviewing your job descriptions, contact me.



Carole Kaptur is the director of human resources outreach at the National Association of REALTORS®. Contact her at 312-329-8311 or ckaptur@realtors.org.

Coaxing the Best From Volunteer Leaders

Fox Valley (Ill.) CEO is developing strong committee and board members with a new Foundations series.

Midway through his 20-year career in association management, Chris Studebaker, CEO of the REALTOR® Association of the Fox Valley, Ill., decided to go back to school. Earning an MBA from Aurora University with a concentration in leadership would be a way to up his game as an executive director, but more important, he could better guide volunteers to become more effective leaders.

“Throughout my career, I’ve worked with exceptional leaders, and unfortunately, many more who were marginal or poor,” he says. “I went back to school to equip myself with the tools to help those leaders become better and pursue my passion for organizational and leadership development.”

Studebaker applied his leadership development expertise at the American Massage Therapy Association, the Finishing Contractors Association of Illinois, the Northern Illinois Painting and Drywall Institute, the REALTOR® Association of Southwestern Illinois, and the National Association of Home Builders. Through it all, he found that issues related to managing volunteers and leadership are universal. “If I had to boil it down to a couple key ways to improve leadership development,” he says, “it would be planning and solid communication.”

Volunteer leaders need direction

Consistent communication between the AE and the executive leadership team is how Studebaker establishes trust and mutual respect.

“Although there are certainly other keys to successful volunteer-staff relationships,

clearly communicating roles, responsibilities, and expectations ensures that everyone stays in their own lane,” he says. “Trust breaks down when volunteers feel like they must take on other roles because someone has not followed through or lived up to expectations.”

When a volunteer leader interferes with a staff person’s job or assumes control over a committee, task force, or project, it’s often because of the leader’s inability to delegate to committees and work groups and hold them accountable to budgets, deadlines, and success yardsticks, says Studebaker.

“Absent direction or accountability from leadership, volunteers will fill their allotted meeting time with nonstrategic or trivial priorities,” he says. “If your committees are spending time deciding the color of the napkins at the annual dinner, it is possible that you’ve veered away from your strategic plan.”

Sticking to a thoughtful, detailed, consensus-driven strategic plan with clear objectives and measurable outcomes isn’t just a method for effective leadership, it’s also a way to sell change, Studebaker has found.

When he joined the REALTOR® Association of the Fox Valley in 2014, naturally there were some long-established norms he sought to change.

“We used the strategic planning process to challenge the status quo and gave the committees and work groups permission to take risks,” he says. This gave volunteers the opportunity to reimagine a wide range of association programs and services.

Improving the new member orientation



program was an early priority. Armed with a mandate to be creative and deliver results, the committee made innovative changes that have been well received. In fact, the orientation’s committee trade show is the main way RAFV has increased member signup for association committees.

Building better leaders

In addition to having Studebaker as a model of leadership, the association ramped up its formal volunteer leadership training with the Foundations in Leadership program. The 10-session series, now in its second year, invites members to “ignite the fire within, embrace change, get out of their comfort zone,” and learn strategies to become better leaders at work and in the community.

“Using committees or committee chairs as the leadership farm team is not sufficient anymore,” says Studebaker. “As associations evolve to meet the demands of new generations, traditional routes of developing organizational leaders had to change. We saw a need for leadership skill development and built a program to fill it.”

The Foundations in Leadership program is an investment, says Studebaker, but already it is paying off. The inaugural class of 2018 produced four first-time Board of Directors members and five new RPAC Major Investors.

One characteristic of AEs who elicit excellence from their volunteers is a willingness to volunteer themselves. Studebaker has served on National Association of REALTORS® AE committee work groups and commercial advisory board.



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