

REALTOR® AE

REALTOR.ORG/RAE



How to deliver practical, engaging, and lifesaving

Safety Education

Page 12

Associations Boost Safety Focus Page 5

12 Things to Prepare for Now Page 14

Why You Need a Crisis Communication Plan Page 18



The Transaction Solution to Meet Your Members' Needs



Support your members' success. Provide them with the total transaction solution designed for real estate professionals.

Create, manage, share, negotiate, eSign, and store transactions online with Form Simplicity.



Save members time and money. Going paperless eliminates hassles and costs, including printing, shipping and driving across town to collect signatures.



Position your members as prepared, effective, and technologically up to date with smart forms, cloud storage, broker tools and eSign.



Quality support and help via the real estate industry's premier tech support service, Tech Helpline. Reach our experienced, US-based analysts by phone, email or chat.



Form Simplicity's integrated electronic signature solution, eSign, meets and exceeds strict electronic signature guidelines often required by major banks and lenders.

Contact us at Info@FormSimplicity.com
or 888.784.5404 to see a live demo.

Form Simplicity and Tech Helpline are owned by Florida Realtors®



FormSimplicity.com

2014-2015 RAE Editorial Advisory Board

Amanda Arwood
Virginia Association of REALTORS®

Eric Berman
Massachusetts Association
of REALTORS®

Pat Breme
Fredericksburg Area Association
of REALTORS®, Va.

Casie Conlon, RCE
Central Oregon
Association of REALTORS®

Julie Davis
Greater Nashville
Association of REALTORS®

Brian Doherty
The Northeast Association
of REALTORS®, Mass.

Amy DuBose, RCE
Four Rivers Association of
REALTORS, Texas

Karen Dumond, RCE, e-PRO
Massachusetts Association
of REALTORS®

Shirley English, RCE, CAE
Marco Island Area Association
of REALTORS®, Fla.

Guyula Greenly, RCE
Wyoming Association of REALTORS®

Tiffany James
Greater Las Vegas
Association of REALTORS®

Michael Kidd
Orlando Regional REALTORS® Association

Joe Kras
Michigan Association of REALTORS®

Cliff Long
Birmingham Area
Association of REALTORS®

Tia R. Robbin, RCE
Northwest Montana
Association of REALTORS®

Lynn Sullivan
North San Diego County
Association of REALTORS®,

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.

REALTOR.ORG/RAE



Members of the Coastal Carolinas Association of REALTORS® take part in a personal self-defense seminar with a local karate expert.

Safety Education

Personal safety classes and training aren't new at REALTOR® associations, but they've added a focus on keeping safety awareness front and center continuously, not occasionally. [PAGE 12](#)

12 Things to Plan for Now

The unexpected doesn't have to become a catastrophe if you're prepared. [PAGE 14](#)

Crisis Response

A communication plan that outlines roles, duties, and procedures for responding to problems or disasters can save your reputation. [PAGE 18](#)

AE voices

AE COMMITTEE CHAIR UPDATE

It's every association's job to push the message of safety year round. [PAGE 2](#)

PROFILE

Rob Philipp, CEO of the Fraser Valley Real Estate Board in Canada on common challenges. [PAGE 28](#)



news

HOT TOPICS

Associations on all three levels of the REALTOR® family pledge to boost safety awareness. [PAGE 4](#)

NAR board revamps RPAC fundraising program. [PAGE 5](#)

SUCCESSFUL PROGRAMS

Association charity events, fundraisers, and other ideas to inspire your community involvement. [PAGE 5](#)

POLITICAL ADVOCACY

Campaign success, RPAC fundraising best practices, and mobilizing members against harmful local ordinances. [PAGE 6](#)

need to know

CORE STANDARDS

Associations successfully tackle the required strategic planning process. [PAGE 24](#)

LEGAL

Keep your safety program legal with these tips and resources. [PAGE 26](#)

online

REALTOR.ORG/RAE

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

TWITTER @RealtorAEmag

FACEBOOK Facebook.com/RealtorAEmag



Safety Is Every Association's Job



Jarrod C. Grasso, RCE,
CEO, New Jersey
Association of
REALTORS®, 2015 chair
of the AE committee

Above all the other parts of the job, I hope every one of our members takes his or her safety seriously.

Recently, we were tragically reminded of some of the on-the-job dangers when we learned of Arkansas REALTOR® Beverly Carter's death. Beverly disappeared in September after showing a home to a prospective client, who later was charged with her kidnapping and murder. Across the country, this was a painful reminder of how careful our members have to be in their day-to-day lives.

In a perfect world, every potential buyer and seller would be respectful and kind. But the world we live in is far from perfect. Being a REALTOR® involves risks that come in many forms.

As AEs, we work very hard to educate and prepare our members for every possible situation. Still, the association's voice can only reach so far. I urge you to ask your members about their safety plan: With whom do they check in? How do they vet

clients? Where do they log information?

AEs can offer help and resources to advise members in their plans and preparations. Promote the resources from the national association, which include agent itineraries, action plan documents, and prospect identification forms. Print copies for members and distribute them at meetings. It may seem like an unnecessary step, but anything that can help keep our members safe is worth it.

Encouraging members to have a safety strategy will go a long way, whether it's in the office, out with clients, or at home.

We need to encourage our members to talk with their managers and make sure there is an officewide safety plan, not just a personal one. We all know office dynamics vary from broker to broker. In one brokerage office, it may be easy to institute new rules regarding meeting new clients and logging identification. In another, members may hit red tape if they try to change office procedures too

much. So what are we to do? I think the answer lies in our individual members. We need to foster an environment that allows for members to help and support one another, especially when they ask to make changes for the better.

As an organization, we traditionally recognize REALTOR® safety in September, but it's really a year-round job. I'm encouraging you to make a year-round commitment to your members' safety. The AE Committee stands ready to assist NAR President Chris Polychron in any way possible with his safety initiative for 2015.



An example of associations taking the lead in member safety education: The Mainstreet Organization of REALTORS®, Ill., recently launched a member safety video series to complement its safety class offerings and safety information online. [youtube.com/watch?v=0ld93mNY900]



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

Chair, Association Executives Committee Jarrod C. Grasso, RCE
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
Advertising Sales Natalie Matter DeSoto, 800-501-9571
or 717-580-8184, natalie.desoto@theygsgroup.com

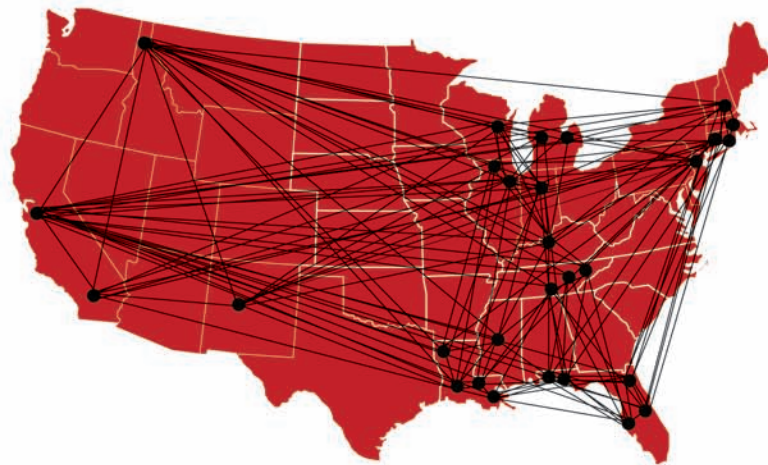
©2015 by the National Association of REALTORS®. All rights reserved. (ISSN 0034-0804) REALTOR® AE is a professional magazine published four times yearly by the National Association of REALTORS® as a service for REALTOR® association executives. Articles in this magazine are written from the perspective 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. Reprint permission: 312-329-8874. Distribution: Local and state executive officers, association staff, and MLS directors. **Subscriptions:** Call 800-874-6500.





Your **Commercial** Members will Thank You.

- » Locally-branded Commercial Information Exchange (CIE) or Commercial MLS (CMLS) completely controlled by your association
- » Serves the unique needs of commercial members
- » Built-in syndication that maximizes your member's exposure, including via RPR Commercial
- » Easy to manage with existing resources
- » Positions your Association as the voice for commercial real estate in your community
- » Local-national scope connecting REALTORS® nationwide through Catylist's expansive network



The #1 CIE/CMLS Provider to REALTOR® Associations

California Desert Association of REALTORS®
Commercial Alliance of REALTORS® West Michigan
Commercial Association of REALTORS® New Mexico
Greater Baton Rouge Association of REALTORS®
Greater Chattanooga Association of REALTORS®
Greater Louisville Association of REALTORS®
Indiana Commercial Board of REALTORS®
Knoxville Area Association of REALTORS®

My Florida Regional MLS
New Orleans Metropolitan Assn. of REALTORS®
Northwest Louisiana Association of REALTORS®
Pensacola Association of REALTORS®
REALTOR® Association of Acadiana
Rockford Area Association of REALTORS®
Statewide MLS of Rhode Island
And more!

— Learn more —

Contact us for a FREE personal webinar or on-site visit.

Visit Us at: 2015 Joint NAR / CREA AE Institute • REALTORS® Legislative Meetings & Trade Expo
2015 REALTORS® Conference & Expo

Richard Maxson, Catylist SVP • 920.605.7590 • richard@catylist.com

Associations Boost Members' Focus on Safety

NAR, states, and locals increase training, education, and awareness.



NAR launched REALTOR® Safety Month in 2003 and expanded it to a year-round program and service initiative in 2009. In 2015, NAR President Chris Polychron will make safety a paramount focus of the organization with a variety of new resources for members and associations.

“This year, we are going to take a look at what we offer and see how we can improve everything from tools and technology to resources and education,” he says. “2015 is going to be a new chapter in REALTOR® safety.”

Current resources on realtor.org/safety include talking points and handouts, webinars, videos, articles, smartphone apps to download, products to purchase, and experts available for training presentations. In the works are new biannual safety webinars, monthly communications on various safety topics you can share with your members, and a weekly update of the safety widget with a new safety tip. NAR will offer a list of best practices but will stop short of mandating any of these practices.

By now all associations should have received the REALTOR® Safety video that was included in NAR's Orientation Toolkit, mailed to all state and local associations in January.

To keep safety in the spotlight, REALTOR® Magazine is launching a new section on well-being to promote new and existing content on safety and health. The magazine's Business Tips & Trends newsletter will make safety a permanent element in the design and not just an occasional feature.

State and local associations are also boosting safety programs and awareness. Many have begun lobbying real estate commissions to approve safety instruction for continuing education credit and to make safety training a mandatory part of precensing and license

renewal education.

In North Dakota, all licensees will be taking a safety course in 2015 to renew their license thanks to the North Dakota Association of REALTORS®, which lobbied the real estate commission to mandate the three-hour course. “We had already been in contact with safety instructors and had contracts in place to offer the training because we felt we would be doing it with or without the commission making it a requirement, but we're thrilled they acted so quickly,” says state association CEO Jill Beck.

In Arkansas, Gary Isom, executive director of the Arkansas Real Estate Commission, recently announced that for 2015 safety education will be offered as continuing education and safety will be a topic in the education for new licensees. “While tragedies can bring everyone's attention to issues such as personal safety, our intent is to ensure that awareness of this issue becomes a permanent and key component of the practice of real estate in Arkansas,” Isom said in a statement.

Duncan R. MacKenzie, CEO of the New York State Association of REALTORS®, plans to approach state regulators to include safety training within the salesperson and broker qualifying courses. “President Chris Polychron challenged the states to focus on safety in Beverly Carter's memory, and, in response, NYSAR will rededicate itself to helping prevent another senseless tragedy,” says MacKenzie. NYSAR offered a three-hour continuing education safety course at its tri-state Triple Play convention in December, and starting in 2015, its GRI courses have been rewritten to include a safety segment. “We will utilize our website to direct our members to the wealth of safety information available at realtor.org.”

RPAC Replaces Fair Share Program

In an effort to increase REALTORS® Political Action Committee investments and more effectively position itself in the new political landscape, NAR's Board of Directors in November approved changes to its fundraising program.

Among the changes put into place Jan. 1 is a needs-based funding goal replacing the long-standing fair-share contribution system. This means RPAC will determine on a two-year election cycle what it really needs to be effective in the campaigns in which NAR must engage. With the change, the 70-30 percentage split between the

states and national association is eliminated, with the exception of the Major Investor program.

The new structure gives state associations greater flexibility in how they meet their goals, says RPAC Fundraising Managing Director Brooke Roth. State associations have the freedom to decide when they send their hard- and soft-dollar investments to NAR to meet their fundraising goal.

"By working together to raise more money at all levels of the organization, state and local

associations, and now MLSs too, will be able

to continue to be the best voice for real estate in their states and communities."

State associations will notify their local associations of the state's fundraising goal and what each local association's goal is. NAR does not set goals for local associations.

The revamp also includes a program for soliciting funds from MLSs for use in independent expenditure campaigns, with half going to federal campaigns and half to state campaigns. For more details on the program changes, including a continuously updated FAQ, visit realtoractioncenter.com/rpac/sub/goals.html.

Changes to NAR Mobilization Grants

NAR's Board of Directors in November approved changes to the issues mobilization grant fund process. To ensure that associations have an appropriate level of investment in issue campaigns for which they are seeking NAR assistance, they will have to put up some of their own funds under a "skin in the game" policy to receive NAR grant funds. The amount depends on the size of the grant request (from 10 percent to 50 percent) and can include funds from coalition partners and nonfinancial resources, such as staff and volunteer hours. For more, visit realtoractioncenter.com/for-associations/issues-mob/.



Successful Programs

Consumer Outreach: Enhancing the REALTOR® Image



Building Better Communities

REALTORS® participate in San Antonio Board of REALTORS® Build Day with Habitat for Humanity.

Consumer Outreach: Enhancing the REALTOR® Image



Community Outreach Breakfast

The Community Outreach Committee of Montgomery County Association of REALTORS®, Pa., served breakfast to approximately 100 seniors who serve as foster grandparents with Family Services of Montgomery County in October as part of REALTORS® Reach Out Month.

Consumer Outreach: Community Investment



Garage Sales and Cocktails for Charity

The Hudson Gateway Association of REALTORS®, N.Y., donated \$12,600 in proceeds from its "Just a Wish Away" cocktail party to Make-A-Wish Hudson Valley, the Tarrytown-based nonprofit that grants the wishes of Hudson Valley children with life-threatening medical conditions. The association donated an additional \$8,000 to the charity raised through its summer garage sale fundraiser.

GAD Rallies Members to Fight Laws Slowing Home Sales

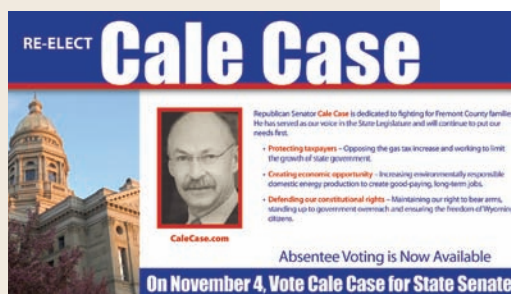
In California, **San Mateo County Association of REALTORS®** battle against point-of-sale laws achieved a new level of success this past year thanks to coordinated member effort and data that reversed or stopped eight proposals that would have significantly slowed housing sales.

Point-of-sale mandates enable local governments to stop the sale of a home until its demands (for inspections, improvements, certifications, and other issues) are satisfied. By creating member legislative response teams in each of the association's 15 cities, San Mateo's Government Affairs director, Paul Stewart, was able to focus the involvement of local REALTORS® with local elected officials and staff. Aided by research from the California Association of REALTORS®, the legislative response teams proved to lawmakers that point-of-sale mandates are inefficient and inequitable. "The data was absolutely invaluable," says Stewart, "because it framed our presentations that point-of-sale mandates added to the cost of housing and became potential deal killers, especially for first-time home buyers."

Campaign Success, Out of the Gate

The **Wyoming Association of REALTORS®** jumped into political campaigning for the first time this year and came up with four wins and a very close race. Laurie Urbigkit, the association's GAD, attended NAR's June Campaign Management Training in Denver and returned home with the skills and inspiration to get started with independent expenditures, she says. IEs are election advocacy efforts conducted independently of—not in coordination with—candidates' campaigns. Wins in the primary election led Urbigkit to undertake another program backing state Senate candidate Cale Case in the general election, which he won.

"Thanksgiving morning as I was busy cooking, I got a phone call from Mr. Case," says Urbigkit. "He told me he always takes a few minutes on Thanksgiving to call someone he really appreciates. He said he hoped I would pass on his appreciation to all REALTORS® and insisted that we made the difference in his race." For more on IE grants and campaign management training, contact NAR's Julienne Uhlich at juhlich@realtors.org.



Small Changes Make Big Impact on RPAC Fundraising

With just a few tweaks to its RPAC fundraising program, the 2,161-member **Osceola County Association of REALTORS®, Fla.**, was able to reach 173 percent of its RPAC goal (up 71 percent from 2012) and surpass its major donor goal, says Carol K. Platt, the association's AE and GAD.

The most successful addition to the program was a value-focused appreciation letter to each member. "One week prior to dues billing, which included the optional RPAC contribution, our members received a letter from our incoming president explaining the 'value proposition' of RPAC and thanking members for sustaining the industry, protecting consumers' property rights, and ensuring a fair marketplace for their fellow practitioners through their contribution to RPAC," says Platt.

RPAC raffles proved to be popular among members, so the association offered three throughout the year, with prizes including iPads and Bose wireless speakers. Osceola also added two new categories to its RPAC contributor awards night, affiliate contributors and long-term contributors, and brought back its successful Casino Night fundraiser.

To optimize the results from the association's RPAC auction, Platt combed through past bidding data to determine which types of items attracted the most bids. "We realized we needed to focus on electronics, grandchildren items, vacation and travel items, dinners, fashion-branded items like purses and sunglasses, and alcohol," says Platt. Auction bids on the grand prize—a five-day Royal Caribbean Valentines cruise for two—sold out at \$100 each. An RPAC grant from NAR enabled the association to purchase higher-quality prizes, yet Platt still squeezed every penny out of the grant by purchasing highly discounted items throughout the year, rather than buying all the prizes one or two months before the auction.

"We've found that members respond well to a wide range of contribution opportunities and levels," says Platt. "This year's new contributors will hopefully turn into long-term donors."

Introducing SentiLock's Bluetooth® REALTOR® Lockbox

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

Generate One Day Codes

- Allow out-of-area agents, contractors, or non-card users property access with secure codes.

View Access Log

- Know who showed your property and when at the touch of a button.

Assign/Remove from Property

- Assign lockboxes to properties allowing for improved inventory and showing notification reporting.



www.sentrilock.com 1-866-736-2322

The Bluetooth® word mark and logos are registered trademarks owned by Bluetooth SIG, Inc. and any use of such marks by SentiLock is under license. Other trademarks and trade names are those of their respective owners.



T. Dallas Smith, a current Atlanta Commercial Board of REALTORS® board member (left) and Egbert Perry, CEO of Integral Group.

Atlanta Commercial Board Kicks Off Diversity Initiative

The diversity committee of the **Atlanta Commercial Board of REALTORS®** recently kicked off a new initiative called the Commercial Real Estate Studio. This series of events features women and minority industry leaders sharing their personal experience of building a commercial real estate practice and all the successes and hurdles along the way. The first event in October attracted more than 150 attendees to hear real estate mogul Egbert Perry, CEO of Integral Group and recognized as an innovator in urban development and revitalization, talk about his personal road to success. Modeled after the popular TV show *Inside the Actors Studio*, the CRE Studio will feature two or three interviews a year with women and minorities from the Atlanta commercial real estate community.

Florida Road Rally For RPAC

Florida REALTORS® on Harleys, Hondas, and all manner of motorcycles (and some cars) rode to build participation in, and support of, Florida REALTORS® Political Action Committee, Oct. 16-18. Riders set off on a route that took them to stops at local associations and other checkpoints in order to bring attention to real estate-related political and legislative issues. Raffle tickets to win a 2014 Harley Davidson Dyna Super Glide sold at \$100 each, raising more than \$113,400 for Florida's PAC.



NAR Board Improves Professional Standards Processes

To make the enforcement of professional standards more efficient, the National Association of REALTORS® Board of Directors approved changes to the *Code of Ethics and Arbitration Manual*, Professional Standards Policy Statement, and other professional standards documents to:

- Clarify the role of alternates in professional standards hearing panels.
- Shorten time frames and clarify guidelines for ethics enforcement administration.
- Establish a "fast track" administrative timeline for resolving ethics complaints.
- Eliminate "rehearing" provisions.
- Expand authorized use of remote testimony, and provide guidance on ensuring its confidentiality.
- Limit the use of continuances of ethics hearings to certain specified instances.
- Require those primarily responsible for administration of professional standards processes to complete administrator training every four years.
- Establish the responsibility of associations to offer ombudsman services to members, clients, and consumers, either directly or as part of a cooperative agreement.
- Establish a citation system and schedule of fines for optional adoption by local and state associations.

Access updated documents at realtor.org.

New Toolkit Addresses Relationship Building Between AEs and Large Brokers

A collection of best practices and examples from AEs and large brokers on how they develop and maintain healthy relationships with each other is available on realtor.org.

The toolkit is the work of a 2014 AEC work group that solicited input from AEs and brokerages around the country. The resource will be evergreen, welcoming AEs and brokers to submit comments and tips to curator Courtney Wilson (cwilson@realtors.org). Visit realtor.org/ae/manage-your-association/association-and-large-broker-relationships

Pennsylvania Associations Merge

The **Carbon County REALTORS® Association** and the **Lehigh Valley Association of REALTORS®** in Pennsylvania merged in January to become the **Greater Lehigh Valley REALTORS®**. Ryan Conrad, former AE of Lehigh Valley, will now lead the Greater Lehigh Valley organization.

REALTOR[®] SAFETY PROGRAM

4 WAYS YOU CAN SHARE THE MESSAGE OF SAFETY WITH YOUR MEMBERS:

- ① **Watch NAR's Window to the Law video** for legal tips and best practices to consider when implementing safety programs and policies.
- ② **Discuss safety at your new member orientation.** Whether you discuss developing personal safety protocols, show videos or share articles, safety should always be on the agenda.
- ③ **Host a safety seminar.** Invite local safety experts to share their knowledge on how your members can stay safe or refer to the growing list of safety presenters available under Resources for REALTORS[®].
- ④ **Embrace technology.** Post safety information on your social media accounts. Write articles for your e-newsletters. Share the safety widget and a banner on your website. Don't let your members forget the importance of personal safety.

Visit www.realtor.org/Safety
to view all the safety resources
and tools available through the
REALTOR[®] Safety Program.



NATIONAL
ASSOCIATION *of*
REALTORS[®]

Meet the New RCEs

These 34 REALTOR® association executives earned their RCE (Realtor® association Certified Executive) designation after an extensive course of study and exam in November. RCE is the only designation created specifically for REALTOR® association executives. It exemplifies goal-oriented AEs with

drive, experience, and commitment to professional growth. Candidates earn the designation by accumulating points through experience, education, and a comprehensive written exam. For more information on getting started toward your RCE, visit realtor.org/rce.



Wyndi Austin, RCE,
Southeast Valley Regional
Association of REALTORS®,
Ariz.



Karen Becker, RCE,
Southeast Minnesota
Association of REALTORS®



Gavin Blair, RCE,
Dayton Area Board of
REALTORS®, Ohio



Susan Blumhoefer, RCE,
West Central Association of
REALTORS®, Minn.



Byron Bogaard, RCE,
Central Valley Association of
REALTORS®, Calif.



Sharon Carlson, RCE,
Quad City Area Association
of REALTORS®, Iowa



Joseph Croce, RCE,
Southside Virginia
Association of REALTORS®



Pamela Croke, RCE,
Bucks County Association of
REALTORS®, Pa.



Tonya Deskins, RCE,
Southeast Valley Regional of
REALTORS®, Ariz.



Wendy DiVecchio, RCE,
Greater Las Vegas
Association of REALTORS®



Brian Doherty, RCE,
Northeast Association of
REALTORS®, Mass.



**Amanda Sue Ebersson,
RCE,** Scottsdale Area
Association of
REALTORS®, Ariz.



Angela Emerson, RCE,
Sussex County Association
of REALTORS®, Del.



Cindi Ferguson, RCE,
Wichita Area Association of
REALTORS®, Kan.



Janet Gallagher, RCE,
Greater Fort Lauderdale
REALTOR® Association, Fla.



Laura Halverson, RCE,
Tri-Counties Association of
REALTORS®, Calif.



Bob Hart, RCE,
Santa Barbara Association of
REALTORS®, Calif.



Myron Larimer, RCE,
Greater South Bend-
Mishawaka Association of
REALTORS®, Ind.



**Mona LeBleu,
RCE,** Kerrville Board of
REALTORS®, Texas



Miguel Legarreta, RCE,
Ada County Association of
REALTORS®, Idaho



Mary Leidy, RCE,
Collin County Association of
REALTORS®, Texas



**Ann Londrigan, RCE,
CAE,** Illinois Association of
REALTORS®



Cliff Long, RCE,
Birmingham Area
Association of REALTORS®,
Ala.



Margaret Lynch, RCE,
Richmond Association of
REALTORS®, Va.



Dennis MacDonald, RCE,
REALTORS® Association of
the Palm Beaches, Fla.



Jean Maday, RCE,
National Association of
REALTORS®, Ill.



**Joseph McClary, RCE,
CAE,** Kentucky Association
of REALTORS®



Kim McCoy, RCE,
Mainstreet Organization of
REALTORS®, Ill.



**Paul McLaughlin, RCE,
CAE,** Iowa Association of
REALTORS®, Iowa



**Amy Ritsko-Warren,
RCE,** Greater Capital Area
Association of REALTORS®,
Md.



Cheryl Smith, RCE,
Waterloo-Cedar Falls Board
of REALTORS®, Iowa



Shelley Specchio, RCE,
Northern Nevada Regional
MLS Inc., NV



**Deborah Allen Talley,
RCE, CAE,** Richmond
Association of REALTORS®,
Va.



**Kimberly Wiggins,
RCE,** Northeast Florida
Association of REALTORS®,
Fla.

RCE at AEI

Earn points toward your RCE by attending the annual RCE nuts-and-bolts workshop at the AE Institute in Vancouver where you'll learn about the RCE designation process and walk through the applicant data form.

.REALTOR
is making history!



Keep your members on the cutting edge of technology!

The .REALTOR domain is one of the top 10 fastest growing top-level domains of all time (outside of country codes)! With nearly 100,000 domains claimed, members are recognizing that the Internet is changing.

There's still time to participate in the .REALTOR AE Marketing Program

Earn a FREE .REALTOR domain for your Association for up to 5 years by promoting .REALTOR to your members. Submissions with examples are due by March 31, 2015!

Learn more at www.about.realtor/associations



NATIONAL
ASSOCIATION *of*
REALTORS®





Coastal Carolinas Association of REALTORS®



Coastal Carolinas Association of REALTORS®



Birmingham Association of REALTORS®



Waco Association of REALTORS®

How to deliver practical, engaging, and lifesaving Safety Education

Personal safety classes and training aren't new at REALTOR® associations, but now they're adding a focus on keeping safety awareness front and center continuously, not occasionally.

Typically, REALTORS®' focus on safety lasts 30 to 90 days [after an incident], said Birmingham, Ala., broker David Lucas at his association's Agent Safety Town Hall Meeting in October. "Lots of guns, apps, and alarm jewelry will be bought. Then, time will pass and the memory will fade. The jewelry will not match the outfit and won't be worn, the app will be buried next to the January weight loss app, and the pepper spray will find its way to the bottom of the purse."

Lucas, a former police officer and tactical squad member, says real estate agent safety is an attitude. "This attitude is only obtained through proper and continuous training. Agents should be getting an opportunity to have safety training quarterly at a minimum," he recommends.

In light of the recent REALTOR® attacks, such as the September kidnapping and slaying of Arkansas REALTOR® Beverly Carter, the Coastal Carolinas Association of REALTORS® in Myrtle Beach—like many others across the country—offered a heightened menu of safety programs.

"We offered a hands-on self-defense seminar by a karate sensei, a safety presentation by a local police officer, and a demonstration of safety products by a representative from Damsel in Defense," says Angela Fabbri, the association's director of marketing and communications.

"When safety is not top of mind, or you're not hearing

about situations like Beverly Carter's, it's easy to get lax," says Laura Crowther, Coastal Carolinas CEO. Crowther vows to keep safety a prominent focus year-round.

Offering a greater variety of safety classes is a priority for REALTOR® associations and a member demand, AEs say. Members usually prefer to take classes sponsored, or at least vetted, by their association because the needs of real estate agents are unique. Safety classes specific to REALTORS® are getting more popular, although they still can be hard to find.

If your association is considering starting or beefing up a safety training program, here are tips from associations that have offered successful programs, as well as some resources from NAR.

Where do I find the right instructors?

Even a small association should be able to find local experts in law enforcement who can share their knowledge and provide hands-on training. Because law enforcement personnel usually do not charge for their time, they are a natural first choice. Ask law enforcement agencies for referrals and recommendations. Vet instructors and make sure they have professional liability insurance. Make sure the instructor understands the types of situations your members are likely to encounter and is willing to customize classes for REALTORS®.

By Masha Zager

What type of safety class should I offer?

There's no single format or curriculum for safety training. In fact, by offering classes on hands-on self-defense, handgun safety, nonlethal weapons, danger avoidance, and technology tools, you can expose members to a range of techniques and information so they can choose what works best for them. Not everyone wants to carry a gun, for example. Poll members to gauge their interest in specific types of training.

Where should I offer training?

For hands-on training, choose an appropriate facility. "Do your due diligence to make sure it's a safe teaching environment," advises Mike Ostermiller, CEO of the Northern Wasatch Association of REALTORS® in Ogden, Utah. NWAOR is fortunate to have access to the Swanson Tactical Training Center, a state-of-the-art training facility for law enforcement and military personnel, where it has held several classes. But even if you can't find anything comparable to Swanson, make sure the teaching facility is safe and accessible to members with disabilities. Ensure that your association's insurance policy covers any accidents that may happen during hands-on training at your association office.

Which members are likely to attend?

Most association executives report that the majority of attendees for safety classes are women, yet both men and women are interested in safety classes. For hands-on training, consider offering some gender-specific classes since different self-defense techniques may be appropriate for men and women. If you offer a women's class, be sure to offer a men's class, as well. "Men don't feel as comfortable [participating in the classes], but everyone can benefit from them," says Mark Epstein, CEO of Citrus Valley

Association of REALTORS®, Calif. Gender-specific training may encourage more men to take part, he says. Also, expect a large turnout, AEs say. And expect demand for multiple classes. Ostermiller offers as many as five or six classes each year.



Northern Wasatch Association of REALTORS®, Utah

What's the best way to attract members?

Consider offering training that leads to certification for concealed-weapon permits, which are now legal in all 50 states. Relaxed requirements for these permits, along with increased perception of risk, have boosted the demand for certification. Amanda Woods, association executive of the Northwest Mississippi Association of

REALTORS®, notes that her association's class led to an estimated 25 to 30 members becoming certified to carry weapons. And once members begin carrying weapons, they often recognize the need for further, regular training in handling those weapons—so expect to add classes on that subject.

Should I charge for classes or offer them for free?

Members always appreciate a free class but if your association can't afford a trainer, seek a sponsor or a trainer willing to present in exchange for advertising or another perk. Associations report that owners of karate schools, gun ranges, and even private security firms often offer free presentations to attract new clients.



The 174-member Lower Columbia Association of REALTORS®, Wash., hosted a free safety class with the local police chief.

How do I keep the focus on safety year-round?

Schedule a variety of classes throughout the year and include safety instruction in new-member orientation. Schedule safety presentations at brokerage sales meetings or provide the materials (available at realtor.org/safety) to your brokerages. Seek approval for continuing education for safety classes and include safety segments in other courses, such as your Graduate REALTOR® Institute. Encourage members to join safety discussions on social media by posting frequent safety tips, articles, interactive quizzes, and polls.

To help keep your safety focus sharp, NAR will include regular updates in the INS e-newsletter directing you online for new materials and ideas. There are 12 safety articles online now that you can customize and schedule to send out to members every month by e-mail or print, or post them on your website.

Share weekly safety tips with members using the 52 tips at realtors.org/safety and customize REALTOR® Safety Initiative artwork and use it for your publications, mailings, meeting materials, and website—and even on T-shirts.

Association executives report that members who take part in safety training feel safer as a result. And even if the class just serves as a reminder of what members already know, that's all for the good. As Woods says, "There are always some basic things we all know, but we forget over time."



The Greater Albuquerque Association of REALTORS® keeps members updated on area crime and related issues via social media.

12 Things to Plan for Now!

The unexpected doesn't have to become a catastrophe if you're prepared.

It's enough work just to keep your association running according to your daily processes and procedures. Add in a natural disaster, a scandal, or a lawsuit and you could have a catastrophe on your hands—unless you're prepared.

Identifying the risks to your association and implementing appropriate processes to manage them will ensure that your organization runs as smoothly as possible in a crisis.

From employee policies to insurance plans, backup-systems to emergency response teams, your toolkit for crisis needs to be ready at all times. Consider these 12 events below and determine how prepared your are to effectively manage them.





GUN VIOLENCE

It's a sad fact that shootings can happen anywhere. It's not inconceivable that a disgruntled or mentally ill member, home buyer, or employee could enter your association office with a firearm. Consider hiring a pro to help you create an evacuation or lockdown drill, or seek training on decision-making skills in a crisis situation. Also, ensure that your employee manual addresses firearms in the workplace. For example, do you have a weapon-free office? Do you allow members to carry licensed weapons at your events?

CONTAGION

The Ebola scare in the United States jolted the nation into wondering what would happen if a contagious disease got out of control. This doesn't mean you should sit down with your board and discuss Ebola protocol. But consider how the association might operate if employees could not travel to the office. (Even a bad flu could take down your whole staff at once.) How might key services operate? Consider crafting an emergency shared services agreement with a neighboring association³.

FINANCIAL LOSS

The financial meltdown of 2008 may be a distant memory, but what lessons did you learn that will prepare you for the next inevitable downturn? Is your policy on financial reserves up-to-date and being followed? What insurance and policies do you have to protect you from financial theft⁴? The new required Core Standards annual financial review is a great jumping-off point for a full financial planning assessment.

CYBER ATTACK

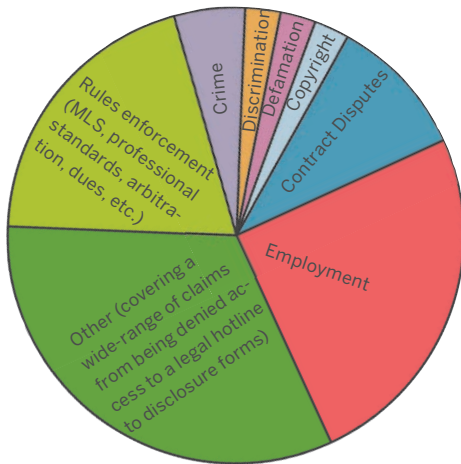
Most associations have on-site as well as off-site electronic file backup storage, but even the cloud is not impervious to outages and cyber attacks. What would you do if you lost your membership database or if professional standards information was leaked to the public? Have a policy for safeguarding personal information (including members' credit card numbers)² and regularly assess the vulnerability of your computer network.

LAWSUITS

From sexual harassment to discrimination to defamation of character, a lawsuit against your REALTOR® association can pop up anytime. If you do not have a lawyer on retainer, research a few options in advance and have the numbers handy. Another way to prepare for lawsuits is to take steps to avoid them. For example, your protection against employee-related lawsuits may be an updated, thorough employee manual reviewed by National Association of REALTORS®' policy department.

12 Things to Plan for Now

Lawsuits against REALTOR® associations in 2014



Of the 40 legal actions (13 lawsuits, 27 threats of lawsuits) taken against REALTOR® associations last year, the biggest single topic was employment (10) followed by rules enforcement (8) then contract disputes (4).

MEMBERSHIP DROP

Your short- and long-term strategic plans likely account for a modest growth in membership, but do you have a plan if membership drops? What programs will you cut or scale back first? How will you implement staff reductions without risking a lawsuit?

SCANDAL

What will you say to the media and members if a board member absconds with association funds, a staff member is arrested, or a member commits a violent crime? Who will make the statement, and how will you contain and calm the situation? Consider crafting a crisis communications plan, which includes establishing a crisis team (see p. 18).

CELEBRITY

Good things can just as easily catch you off guard. Don't miss an opportunity to promote your association for its good deeds. Also, jump on the bandwagon if a member receives an award, wins an election, or writes a book. Invite members to keep you in the loop about their accomplishments and have a plan to get the word out.

TERRORISM

A terrorism attack could take any form. It could shut down public transportation or roads, it could prompt an evacuation of your town, or it could force you to cancel a conference or event. Event cancellation insurance is always a good idea, but also consider how member services could be affected by a terrorist attack and how to enable staff to work from home.

NATURAL DISASTER

Dozens of REALTOR® associations have experienced natural disasters and fine-tuned their procedures as a result⁵. What's your plan for keeping staff safe and getting the word out about office closings or members who may need help? Do you maintain a list of emergency resources for members on your website⁶? What procedure will you follow if your association office is consumed by fire⁷?

YOUR DEMISE

If you check your office e-mails while on vacation because you think your association can't get along without you, imagine a worse scenario. Does anyone else know where you keep the safe key or the login details for online banking? Write down some just-in-case instructions for immediate actions related to daily association operations and keep them in a safe place. Include your computer passwords, duties for the interim AE, and where to find various insurance policies for your family.

THE UNEXPECTED

Don't panic. Know what your duties and legal responsibilities are. Assign duties to staff and practice disaster scenarios at least once a year. Prepare now by crafting a plan for almost any situation your association could face⁹.

RESOURCES

(1) Every state's laws are unique, but learn association and brokerage gun policy basics at illinoisrealtor.org/node/3509

(2) NAR's legal guide to data security procedures is at realtor.org/articles/data-security-privacy

(3) Learn how to set up shared service agreements with neighboring associations: realtor.org/field-guides/field-guide-to-association-shared-services.

(4) The Risk Management & Insurance Issues for Associations Toolkit is at realtor.org/field-guides/risk-management-insurance-issues-for-associations. Read How to Guard Against Employee Fraud at realtor.org/articles/law-policy-how-to-guard-against-employee-fraud.

[guard-against-employee-fraud](http://realtor.org/articles/law-policy-how-to-guard-against-employee-fraud).

(5) Read up on how to craft a disaster plan: realtor.org/eomag.nsf/pages/fa04Disaster.

(6) The Mississippi Association of REALTORS® crafted a resource page for members at hurricaneguide.msrealtors.org.

(7) Search the REALTOR® Association Resource Exchange

(realtor.org/rare.nsf) for "Crisis Management Plan."

(8) Read "Fire Without Fear" at <https://archive.realtor.org/article/legal-update-fire-without-fear>.

(9) NAR is developing a model Crisis Communication Plan for associations to use in the event of a tragic incident. Look for the announcement in the INS soon.

associations

Helping real estate professionals do more.
So you can be more.

Our suite of products **automates** and **simplifies** the repetitive and complex steps involved in real estate transactions.

Arm your members with the tools to **close deals faster** and **grow their businesses**.



zipForm® Plus



zipLogix Digital Ink®



zipForm® Mobile



zipFormMLS-Connect®



zipVault®



relay®

Visit zipLogix.com or call 866-MY FORMS to learn more.

zipLogix Digital Ink® is not endorsed by the National Association of REALTORS® and is not included as part of NAR's REALTOR Benefits® Program



Crisis Response

A communication plan that outlines roles, duties, and procedures for responding to problems or disasters can save your reputation.

Odds are good that you will have to deal with a crisis at some point. And when you do, you'll want to be prepared with a crisis communications plan.

Even when you take the right steps and do the right things, you can still have a crisis on your hands. How you react and communicate to the media, members, employees, and the public will determine how well your association recovers.

Here's one I lived through: We were going through the process of preparing our monthly pending home sales data to release to the media, but the figures seemed too high. We knew one of our three MLSs in Massachusetts had made some changes to its pending sales data. To be sure we were not affected, we asked the MLS and our analytics vendor and felt good the data was correct. As release day approached, we decided to hold off and ask some more questions just to be safe. Again, the answers seemed good and we released the data to the media and members. As it turns out, the data was wrong; we now had a crisis that threatened our reputation.

A crisis is any situation that threatens the reputation of your association or its members, usually exacerbated by negative media attention. For example, a legal dispute, theft, accident, or natural or manmade disaster can be a crisis (see *p. 14 for more*), along with any situation in which the media or the general public perceives your association to have acted improperly.

Why craft a plan?

Odds are good that you will have to deal with a crisis at some point. And when you do, you'll want to be prepared with a crisis communications plan.

Without a plan, you have little chance of recovery. Imagine your leadership speaking directly to the media with their personal take on the crisis or laying blame. Imagine issuing statements to members before the facts are checked. Imagine a member claiming to be a spokesperson for the association and going viral on social media with fabrications. All of this and worse could happen if you, your leadership, and your staff aren't following the same crisis communications plan.

Crisis communication planning

Most experts agree that you need to appoint a crisis team to develop a communications plan. For a REALTOR® association, this group includes the CEO, communications director, general counsel, finance or human resources director, and president. For this group to be effective in an actual crisis it needs to be small, so don't include the entire staff or entire board of directors. For smaller associations, the AE, the president, and legal counsel will do.

The first job of this group is to brainstorm as many potential crises as possible that could impact the association, such as a natural disaster, the tragic death of a member, the arrest of a member on a criminal charge, or the association's support of or opposition to a controversial legislative initiative. Then narrow it down to the top five scenarios that are the most likely to occur, and focus on preparing for those. Preparing for your top five will give you the framework to be able to



By Eric Berman, Communications Director, Massachusetts Association of REALTORS®



Your NAR Membership Benefits You and Your Clients

Did you know that Liberty Mutual is the exclusive auto and home insurance provider under NAR's REALTOR Benefits® Program? As a REALTOR®, you could save up to \$427.96 or more on auto insurance¹ and receive customized coverage and benefits such as Accident Forgiveness², New Car Replacement³, and 24-Hour Claims Assistance. And, now available in 12 states, the Liberty Mutual Insurance Referral Program™ lets you extend these same exclusive auto insurance benefits to your clients⁴. For every client you refer to Liberty Mutual who completes an auto insurance quote, you'll receive \$40.

Get a quote

800-809-9778
LibertyMutual.com/NARwinter

Enroll or learn more

LMreferralprogram.com/magazine



Liberty Mutual is the National Association of REALTORS® exclusive auto and home insurance provider under the REALTOR Benefits® Program.

¹Figure reflects average national savings for customers who switched to Liberty Mutual's group auto and home program. Based on data collected between 9/1/12 and 8/31/13. Individual premiums and savings will vary.

²For qualifying customers, Accident Forgiveness is subject to terms and conditions of Liberty Mutual's underwriting guidelines. Not available in CA and may vary by state.

³Applies to a covered total loss. Your car must be less than one year old, have fewer than 15,000 miles and have had no previous owner. Does not apply to leased vehicles or motorcycles. Subject to applicable deductible. Not available in NC or WY.

⁴Program only available in AZ, CO, ID, IL, IN, KY, NJ, NV, OH, OR, PA, and UT.

Coverage provided and underwritten by Liberty Mutual Insurance Company and its affiliates, 175 Berkeley Street, Boston, MA, 02116.
©2014 Liberty Mutual Insurance

14AFF1356

Crisis Response

competently deal with any other crisis that may arise.

Preparation for each scenario includes determining who the right spokesperson is for each situation. Maybe it would be the AE in all cases, maybe the president if he or she has had media training. Inform your board and staff that they are not permitted to speak to the media on behalf of the association because there are designated representatives.

I also recommend that you approach crisis communications preparation with the goal of being as transparent and open as possible (understanding there are always some things you won't be able to say). Remember, it's a communications plan, not a no-comment plan. If your team concurs that an apology should be issued, then apologize. If your team feels the crisis stems from a misunderstanding, then provide the facts. If your team feels the association must react to a situation, weigh in with the facts you have or with personal sentiment where appropriate. You should also practice answering difficult and uncomfortable questions.

When a crisis breaks, the longer you wait to respond, the less chance you have of controlling the message. Quick action can keep a problem from escalating into a crisis.

Case study in crisis communications

The Scottsdale Area Association of REALTORS® had a crisis in 2013 that served as a learning experience for its team. The association, through its political action committee "Quality of Life Matters," with financial support from a National Association of REALTORS®

Video Crisis Response

A video response to a crisis can quickly add a sense of humility, remorse, dignity, or confidence to your message that is often difficult to convey on paper. But before you set up your tripod, consider these tips.

- Always read from a prepared statement
- Dress appropriately and set in a professional environment
- Be clear, transparent, and informative
- State facts or reasons why you can't release certain facts
- Do not hide behind excuses or brevity



An association-branded and well-followed social media presence, such as this Facebook page (above) from the Illinois Association of REALTORS®, is an essential platform for communicating quickly with members and the public.

Social Media Crisis Response: Own the Conversation

The instant communication afforded by social media is a blessing and a curse when it comes to crisis response and management. On one hand, associations can respond quickly with information. On the other hand, disinformation can spiral out of control just as quickly. Resist the temptation to respond to (and bring more attention to) every negative comment online, but do take control of the crisis conversation by issuing frequent updates and information. Commit to establishing a social media dialogue (not monologue) with members and the public.

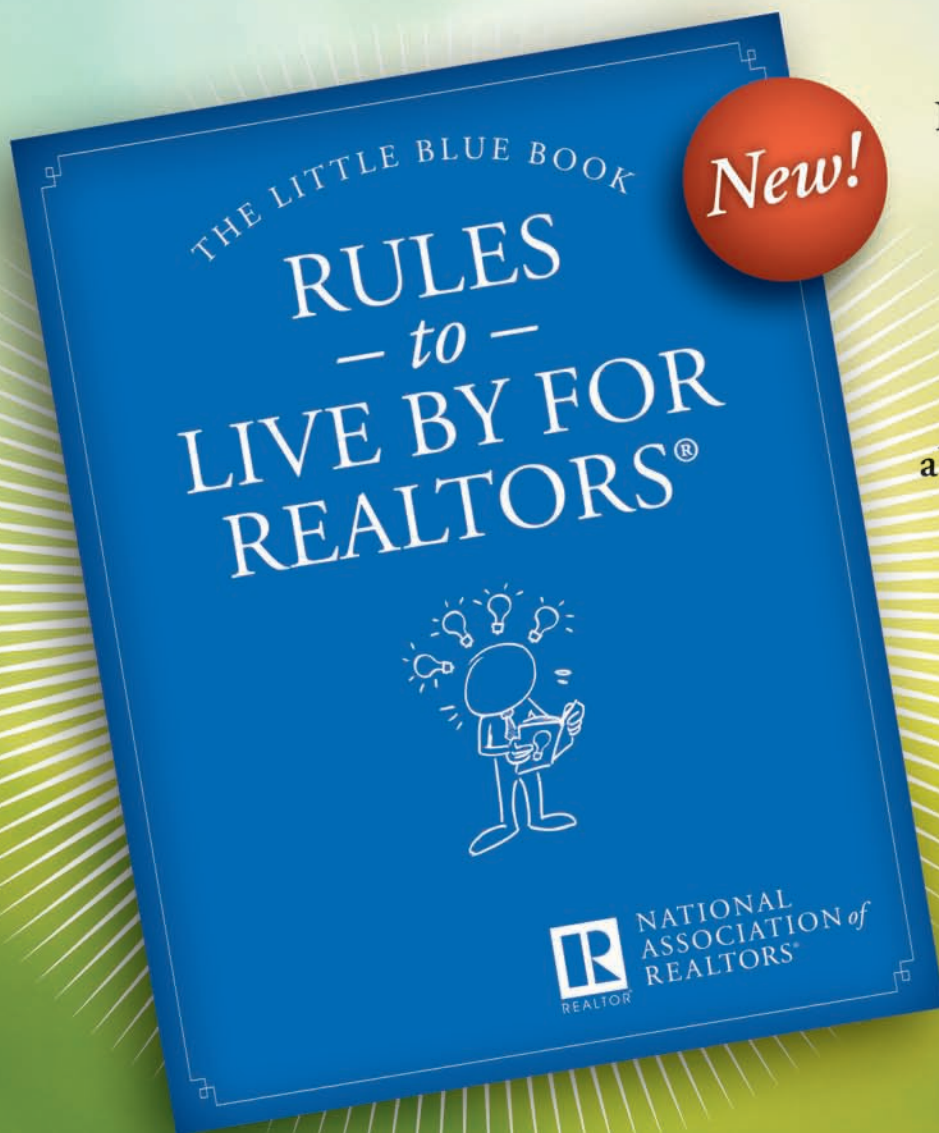
Having a social media policy for staff, leaders, and volunteers is invaluable in a crisis situation. There are a wealth of models online, but in essence, ensure that your policy outlines clear rules for engagement online. For example, state that personal opinions are not to be represented as association positions, confidential association information is not to be posted online, and copyright laws must be adhered to.

Rather than using personal social media accounts, establish branded, official association accounts from which to communicate, yet include the sender's photo—not just your association logo—to add sincerity and authenticity. Entrust passwords and administration responsibilities only to staff.

Work to build the following of your official social media outlets in order to reach members and the public with your information. In a crisis scenario, use social media to funnel attention to a single source of information, such as your website. This will help you keep the volume of information on social media from becoming unmanageable.

Monitor social media to track issues and gauge public understanding of an issue. There's no shortage of social media monitoring software and apps at a wide range of price points, but start with setting up a Google alert with your association name or ask tech-savvy members to help. Lastly, identify the core influencers in your social media community and those who may help you get the word out.

PROFESSIONALISM RESOURCES
for your
MEMBERS!



Now is the perfect time to update your new member orientation materials. Don't forget to include **The Little Blue Book: Rules to Live by for REALTORS®!**

Help your new agents learn about the real estate industry from those who know it best: fellow REALTORS®! With input from more than 600 REALTORS®, this fun, light-hearted read is a *must-have* for your new agents.

THE LITTLE BLUE BOOK
RULES
- to -
LIVE BY FOR
REALTORS®
A Must-Have!

AVAILABLE NOW AT

www.realtor.org/store/lbb

ACT NOW &

SAVE!



Purchase now and
Save 10%
with Code 10LBB



NATIONAL
ASSOCIATION of
REALTORS®

Crisis Response

independent expenditure grant, campaigned in favor of asking voters to approve up to \$212.1 million in bonds that would pay for 39 public projects and result in a slight property tax increase.

The association made a filing error with the city in not disclosing the source of the funding within the deadline and inadvertently did not identify the PAC in its campaign phone calls. Although it was a clerical mistake and something the association fixed with the city after refile and paying a fine, a group of vocal members opposed to the bond went to the media. Headlines read, “Scottsdale protesters rally against REALTOR® group bond-election donations” and an article showed a photo of protesters outside the association office with signs saying, “SAAR Doesn’t Speak for Me” and “Keep Chicago Politics Out of Scottsdale.”

“We immediately put together a small group that included our CEO, president, PR firm, and me to decide on a response,” says Amanda Sue Ebersson, director of communications and technology at SAAR. “We were able to reach out to the media and correct story errors, and then we apologized to our members and explained what happened.”

In a written statement to the media, SAAR elaborated on the mistake, its fault in the mistake, its steps to remedy the situation, and the reasons behind supporting the bonds. The statement provided salient quotes from the chairman of Scottsdale’s PAC that were picked up by the media, including, “This new collaboration of contributors and vendors has resulted in communication and technical and reporting problems,” and our members “do not stand to directly benefit from any of the projects any more or less than all citizens benefit when our infrastructure is up to date and in good repair.”

The resulting headlines—“REALTORS® group admits error in campaign on behalf of Scottsdale bonds”—were tame, due in part to the association’s quick action.

“After it was all over, we put together a comprehensive crisis communications plan,” says Ebersson.

Crisis aftermath

So, how did it end with our data crisis? Well, the media coverage in the aftermath wasn’t pleasant to read, but it did end. We were able to take advantage of our good relationship with the media to address the error and how we planned to correct it. We also didn’t issue the data again for several months and tested it until we were sure it was correct. For the next several months afterward, we also included a statement at the end of the MLS release explaining what happened.

Don’t let a real crisis force you to develop a crisis communications plan. Act now.



When a crisis hits, how you react will determine success or failure.

- Step 1.** Gather as much information as possible, confirm whether there is actually a crisis, and assemble your crisis team.
- Step 2.** If there is a crisis, communicate it to your staff members (explaining their roles) and acknowledge it to your stakeholders (by e-mail, news releases, social media, and other channels) as fast as possible.
- Step 3.** Don’t speculate, but do give a time frame for your next announcement, such as “We are aware of the situation and we are confirming the details. We will give you an update at noon.” Then continue to be in contact with your stakeholders, even if it is to tell them you have no further information.
- Step 4.** Make sure your key messages are adapted for the specific situation.
- Step 5.** Be compassionate and human. In any statement you make, focus on the people who were affected.
- Step 6.** After the breaking news has passed, explain what happened and how you plan to correct it or prevent it from happening again.
- Step 7.** Post-event analysis is critical. What did you learn from this? What worked? What didn’t? Then modify your plans accordingly for the future.

RU READY TO TAKE THE NEXT STEP

— *with* —

REALTOR® UNIVERSITY?

This is a true Master's Degree.

REALTOR® University has concentrations specifically tailored for students who are currently, or aspire to become, association staff at the national, regional, state or local level.

Don't have time for the full Master's Program?

Explore our Graduate Certificate program that offers an abbreviated course track but still provides a fantastic education for Association Staff. Scholarships available for both Master Degree students and graduate certificate students.

For more information:

Visit www.RealtorU.com/AE
Call 1-855-RU-ONLINE (1-855-786-6546)
Email admissions@realtoruonline.net



Eye-opening Strategic Planning

An up-to-date strategic plan is a vital and required element of the Organizational Alignment Core Standards for state and local associations.

Strategic planning committees at the national, state, and local levels meet every year to ensure that their plans address critical issues, needs, and opportunities in the industry. These planning sessions are a time to set priorities and fine-tune your association's goals and vision. They bring members, leaders, and staff together to brainstorm and analyze how to best meet member needs.

Yet some associations have never had a strategic plan or haven't updated one in years.

"I took over as AE about three years ago, and although we had a strategic plan committee and it met once in that time, I couldn't find a plan anywhere," says Kathy Matlock, EVP of the 262-member Big Bear Association of REALTORS®, Calif. Prompted

by the Core Standards obligation, Matlock hired a facilitator in November to lead her committee through the strategic plan development process.

Big Bear selected its facilitator from the National Association of REALTORS®' database of facilitators trained to help REALTOR® associations develop a plan that meets the Core Standards requirements. (Access the Core Standards Facilitators Resource Database at realtor.org/CoreStdFac.nsf.) "Now we have a plan in place for meeting our goals, and I love it," says Matlock. "We have direction."

In Connecticut, the 280-member Ridgefield Board of REALTORS® also completed its first strategic plan this past fall.

"The thought process we went through to get to a final product was educational

and eye-opening," says Holly Callanan, the association's AE. "It helped me bring important issues to the attention of the directors, and this, in turn, will help me accomplish the goals I have set to meet the Core Standards requirements."

"I'm glad NAR is requiring the local boards to reach these goals. Plans might not happen otherwise, and I know the boards are stronger and more efficient as a result."

— Holly Callanan, AE, Ridgefield Board of REALTORS®, Conn.



Maryland's 379-member Mid-Shore Board of REALTORS®' strategic planning sessions with NAR facilitators Lisa Cameron (right) and Chuck Kasky. The facilitators "not only helped us identify who should be on the Strategic Planning Committee but helped us get to the real mission and what we as an association stand for," says Debbie Wilkens, association EVP. "The final strategic plan is one that has meaning and is being used to redirect committees and focus the board."

Associations large and small have described the strategic planning process as enlightening, vibrant, and hard work.

The most time-consuming part of the strategic planning process for the Rockingham County Association of REALTORS® in North Carolina was finding members to serve on the committee, says Trudy Dishmon, association executive. "I asked each board member to recommend at least five members for the committee; then we called all 31 names and found 20 willing to serve," she says.

The planning session facilitator kept discussions lively by switching groups around so members were always hearing a

new voice or opinion. “The members were so focused on getting this right and working together that they didn’t want to leave for lunch,” she said.

To receive grant funds to pay the facilitator and meeting expenses, Dishmon submitted the grant application and her association’s strategic plan, along with her board’s minutes indicating approval of the plan, to NAR in December. She received confirmation a few days later that the plan met the requirements—and a check for \$2,500.

“I have heard nothing but good comments about the strategic planning from members,” says Dishmon. “The whole process was a huge success.”

Reinvigorating the retreat

The 360-member Bismarck Mandan Board of REALTORS® in North Dakota has held an annual planning meeting for many years. But at the board’s recent meeting, the Core

Standards requirement gave it a new energy, says AE Nancy Deichert. “Participants were excited to see something other than usual to-do list come out of the retreat. It was motivating to see the group brainstorm new ideas and to hear them talk positively about some of the things we are already doing,” she says.

Even state associations with established annual strategic planning meetings built in extra time to consider how their plan may meet the core standards.

At the day-and-a-half-long North Dakota Association of REALTORS® strategic planning meeting, participants reviewed the Core Standards in depth, says Nancy Willis, the association’s government affairs director. The association hired an NAR-trained facilitator to guide the discussion—although associations with more than 500 members are not required to use a facilitator to be eligible for a strategic planning grant.

“In reviewing the Core Standards, it was evident that the state has been meeting the standards all along,” says Willis. “We’ve always operated on similar standards as the Core Standards, so, for us, this was an affirmation of our commitment to excellence.”

Strategic plans and requests for grants are due to NAR by June 30, 2015. Money is disbursed only after a plan is submitted to and approved by NAR.

“I’m glad NAR is requiring the local boards to reach these goals,” says Callanan. “Strategic plans might not happen otherwise, and I know the boards are stronger and more efficient as a result.”

Core Questions?

NAR has received hundreds of questions about the Core Standards from REALTOR® associations of all sizes nationwide and regularly posts answers in an FAQ page in the Core Standards tool kit on realtor.org. Chances are good that your question is answered there.

FAQs: Required Strategic Plans

Q. What financial and other resources are available from NAR to facilitate development of strategic plans?

A. Grants at a minimum of \$2,500 and a maximum of \$5,000 are available to associations to develop a strategic plan, or to enhance an existing strategic plan. Grants are disbursed after the strategic plan has been completed, and submitted to and approved by NAR. Grants are based on the number of primary

REALTOR® members at \$10 per member. Secondary members (those who hold their primary REALTOR® membership in another association) cannot be included in this calculation. Grants are available for strategic plans created or enhanced between May 17, 2014, and June 30, 2015.

Q. What can we use the strategic planning grant for?

A. Strategic planning grants—which will be disbursed after a

strategic plan has been completed, and has been submitted to and approved by NAR—can be used for any purpose the association deems appropriate including facilitator fees, meetings and facilities, administrative expenses, travel expenses, and so on.

Q. Must an NAR qualified facilitator be used for an association to be eligible for a strategic planning grant?

A. The primary purpose of the strategic planning grant program is

to ensure associations have access to qualified facilitators. Consequently, associations with five hundred (500) or fewer members must use an NAR-qualified facilitator to be eligible for a strategic planning grant. Associations with more than five hundred members do not have to use an NAR-qualified facilitator to be eligible for a strategic planning grant.

Q. What must the strategic plan include to meet the Core

Standards?

A. Strategic plans must satisfactorily address the Advocacy and Consumer Outreach components of the Core Standards to qualify.

Q. Do the Standards require us to make these plans available to the state association?

A. No. Strategic and/or business plans will be reviewed at the national level only, and not made available to state associations or to any other association in your state.



A self-defense training class meets at the Carolina Association of REALTORS®. Men and women are vulnerable to attack, so make sure training programs are offered to everyone, regardless of gender.

Keep Your Safety Program Legal

Protect your association from liability with procedures to ensure your information is accurate, trainers are insured, and laws are followed.

Brokers and REALTOR® associations across the country are implementing new and updated safety procedures to ensure that their sales teams, staff, and members stay as safe as possible.

As AEs and others in the industry work to strengthen safety practices and give advice to members, keep in mind these considerations to avoid potential exposure to litigation or other legal hassles:

Weapons in the Office

Before implementing any weapons-related association policy or offering members advice regarding weapons safety, note that state laws vary widely in regard to firearms and “nonlethal” weapons such as Mace, pepper spray, and stun guns. Consult your local counsel to ensure that you are conforming with and appropriately citing all applicable laws.

Also, keep in mind that the choice to arm oneself is personal. Carrying any weapon may be contradictory to an individual’s religious or personal beliefs, or may simply be outside of his or her acceptable zone of

comfort. Therefore, avoid establishing any policy that would require anyone to carry a weapon. Similarly, offering any monetary or other incentives to carry a weapon should be avoided.

Any business wishing to maintain a gun-free workplace should consider posting a conspicuous notice making clear that firearms are not permitted on the premises. Be aware, however, that some states prohibit employers from banning lawfully owned weapons from the periphery of a workplace, such as in employees’ securely locked cars in office parking lots. AEs may wish to consider implementing a weapons-free policy for board meetings and any meetings open to general membership or the public.

Safety Presentations

Associations and other businesses may consider bringing in an expert to present safety tips or hands-on self-defense training (see *safety training*, p. 12). If you choose to offer this kind of program, make sure that it can be adequately modified for individuals with special needs. Talk to the

safety specialist beforehand to ensure that the program will accommodate everyone on your team.

Your safety specialist also must be properly qualified and insured for the kind of training you are offering. It’s also a good idea to have your attorney review the engagement contract prior to execution. As an extra layer of legal protection, have participants sign a waiver before participating in any safety training that involves physical activity, especially those involving weapons orientation or self-defense tactics.

Safety Products and Vendors

Associations may also wish to bring certain safety devices or products to the attention of their members. When doing so, AEs should consider vetting any products or vendors for reliability, legitimacy, and safety. Official “endorsements” by associations may present legal pitfalls if these products later prove to be unreliable or otherwise faulty. In presenting any safety product options, associations should consider including a disclaimer that it does

not endorse the products and should work with local counsel to draft appropriate disclaimer language. In no case should any safety product be branded with any REALTOR® or REALTOR® association trademark.

Client Identification Policies

An excellent safety practice for real estate salespeople is to meet with new clients at their office before a showing request to see a valid ID and make a physical or electronic copy of it. In addition, it is a good practice to ensure that a colleague is aware of the details of the showing, including the client's ID, and the time the agent expects to be back in the office. If you decide to encourage your members to follow this procedure, be sure to emphasize that any personal information taken from clients should be kept private and secure and destroyed as soon as practicable. Also, if agents are requesting IDs from one new client, they should

request IDs from every new client.

It is not recommended, for liability reasons, that associations offer their office or building space to members to conduct these meetings. The next best alternative is a public space, such as a coffee shop.

Safety at Conventions

Although the industry has been particularly focused on real estate agent safety during showings or open houses, association staff and members may also find themselves in vulnerable situations when attending conferences and conventions. The combination of unfamiliar surroundings, large groups of strangers, disrupted patterns, and, in some cases, social gatherings involving the consumption of alcohol may create potentially dangerous circumstances for attendees.

Prior to any conference or similar event, AEs should consider reviewing association policies and practical safety measures with any staff that will be attending. NAR offers

resources on realtor.org/safety geared specifically toward ensuring attendee safety at conferences and conventions.

Employee Manuals and Resources

Every association's employee manual should address employment safety. If you feel that your current employee manual is lacking in this area, NAR offers the Sample Employee Manual for Association Executives, available for download at the realtor.org online store.

Become familiar with NAR's broad range of safety-related information for associations and members, including educational materials and other resources to help hone effective safety practices. These materials are available at realtor.org/safety.



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

NSD

GUARANTEED LOWEST PRICES!

Serving REALTOR® Associations for over 20 years

NATIONAL SIGN DISPLAY

FEATHER FLAG KIT



VINYL POST KIT
(72" Tall)
Includes Ground Anchor



HOUSE SHAPED SIGNS & MORE



FLAGS



STOCK RIDERS



STEEL A-FRAME



Black or White
PRE MOUNTED



FLYER STANDS
Acrylic



BROCHURE BOXES

Supra

ShurLok

Master Lock



INSERT FRAMES



CB POSTS



SIGN STAKES



CORD STAKES

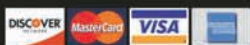


PVC A-FRAME



INFO TUBE

100+ More Products Available



www.nsdinfo.com

NSD

10960 Boatman Ave., Stanton, CA. 90680

* PH: 800-888-3228

* FAX: 714-236-0200

AEs' Common Challenges

Rob Philipp, Canadian AE, on best practices for association management on both sides of the border.



Rob Philipp

The 2015 AE Institute in Vancouver marks the once-every-five-year joint meeting of Canadian and American REALTOR® association executives. Although real estate practice is slightly different in Canada, AEs on both sides of the border face many of the same challenges when it comes to providing value to members, says Rob Philipp, CEO of the 2,800-member Fraser Valley Real Estate Board, located just east of Vancouver, Canada.

Philipp is co-chair of this year's AE Institute and played a key role in session development. "Most of our sessions are applicable and beneficial for everyone," says Philipp. "The speakers are from both countries. And of course, the networking and relationships created last a lifetime."

To help AEs focus on what they need now, there are four educational tracks at the institute: Industry Relationships, Re-engineer your Association, Technology and Communications, and Best Practices in REALTOR® Association Management. RAE spoke to Philipp about some of his own best practices and success stories.

Q. Prior to your current position, you were a business strategist at PricewaterhouseCoopers, consulting with corporate CEOs. What corporate management best practices were you able to implement at your board?

A: Regardless of where I work, the key element for me is to build and develop a great team. With 45 employees, it comes

down to taking the time to understand diverse people and their needs and skills and matching that with the needs of the organization. We foster a culture of excellence, innovation, and caring, although we have had to make difficult decisions as well—and we don't hesitate to make them; delay is bad for everyone.

Regarding our other valuable resource, our volunteers, good governance and training are vital. We make sure they have the opportunity to serve where they can have the most impact and have fun. When you're lucky enough to have professionals volunteering time to help strategically guide their association forward, you want to ensure there's the reward of making a difference.

Q. Your association recently reported that Fraser Valley's real estate market returned to normal in 2014. What does this mean for the association and its programs and services?

A: Yes, 2014 was a good year for us, and we've been fortunate that in Canada we did not see as dramatic a drop in sales as you saw in the United States. Therefore, our recovery has been much quicker. In fact, through the downturn we continued to provide key services and programs to members and didn't need to lay off any staff, but we did trim our budgets. Our members recognize and appreciate exceptional service and are willing to pay for it when they see value. Membership numbers have been stable over the past few years, and we anticipate that will continue.

Technology helps us serve members effectively, yet REALTORS® also value the personal connection they have with staff. We're a relatively small organization and have a long history of working closely with our members and brokers.

Q. Your three-day real estate educational conference and trade show sells out of expo spaces and attracts a strong crowd. What is your secret to success with the event?

A: Several factors play in this success, but it all comes down to value for the dollar. At only \$110 per person, this two-and-a-half-day event addresses all aspects of being an effective real estate practitioner from continual self-improvement and networking to the latest in real estate technology, plus a lineup of high-caliber speakers throughout (this year we have Canada's most respected national TV news anchor, Peter Mansbridge). It's also about recognizing that REALTORS® are multifaceted and they're at different stages in their careers. Some are just starting out; some are in their third decade. So we try to offer value for everyone no matter where they're at professionally, plus members earn continuing education credits. And finally, the real key to our conference success is our staff, who are passionate about getting it just right: finding the perfect speakers, recruiting the volunteers, and promoting the event. They have total leeway in the planning and do an amazing job.



BE THE ENVY OF YOUR INDUSTRY. AND YOUR NEIGHBORS TOO.

\$500 CASH ALLOWANCE*
on top of other incentives for you and your family members.

As an NAR member or association staff, you and your family members in the same household are eligible to receive a \$500 cash allowance on the purchase or lease of almost any Chrysler Group vehicle. This member incentive can be combined with most other existing offers. Plus, REALTORS® get a No-Extra-Charge 2-Year Gas/Diesel Lube-Oil-Filter service.

Need an in-vehicle office? Uconnect® keeps you connected, entertained and more productive while on the road. Ask for directions, make a call, search for a nearby restaurant—Uconnect offers a range of features. Ask your dealer about Uconnect.

FCA

FIAT CHRYSLER AUTOMOBILES



NATIONAL
ASSOCIATION of
REALTORS®

REALTOR Benefit* Program

Official Automobile Manufacturer of the National Association of REALTORS®

VISIT REALTOR.ORG/CHRYSLER FOR DETAILS



*Some program exclusions and limitations apply. Not available on SRT models. See dealer for complete details and eligibility requirements. Chrysler, Dodge, Jeep, Ram, Uconnect and the Jeep Grille are registered trademarks of Chrysler Group LLC. FIAT is a registered trademark of Fiat Group Marketing & Corporate Communication S.p.A., used under license by Chrysler Group LLC.

Celebrating 60 years in Real Estate

We've come a long way since 1955. And Supra has been there for you every step of the way.



1955

From rotary phones to real-time notifications, Supra has stayed current with technology.

2015



supraekey.com

Supra attempts to provide data and/or 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.
© 2014 United Technologies Corporation. All rights reserved. All trademarks are the property of their respective owners.