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SUMMER 2021

THE RELATIONSHIP ISSUE

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through shared
purpose with
leadership, peers

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Adjust Your Setting to ‘Gallery View’

During a recent National Association of REALTORS® online meeting, I was looking at my computer screen and couldn’t figure out why it didn’t show all of the participants. I wanted to hear the person speaking, of course, but I also wanted to see everyone’s faces. Then, it dawned on me—check the view! So I clicked, and sure enough: I needed to change my setting to “gallery view.” Instantly, I could see my peers and connect with trusted friends.

When thinking about the importance of building relationships, collaboration, and trust, my meeting experience came to mind. It made me consider just how many times I might need to adjust my personal view to a gallery setting to stay connected, build and nurture relationships, and collaborate.

Both inside an association and in the larger REALTOR® association community, building relationships and seeking opportunities to collaborate are keys to success for association executives. If I had to name a single trait of successful AEs, I would say it’s their ability to do those two things continuously.

Success means different things to different people, but the AEs I see as most

AEs can’t be expected to have all the answers, but we can be expected to connect the people who can find the best solutions as a team.



successful across the country have three fundamentals in common:

- **Successful AEs build relationships intentionally.** Good AEs are friendly, work hard, and enjoy the people they meet along the way. Great AEs seek out relationships with people they admire and want to emulate. They get involved at the local, state, and national levels, or they join an AE society in their area. They seek out opportunities to give back and build a cadre of trusted relationships.
- **Successful AEs seek to collaborate with others openly and share their knowledge willingly.** The “greats” take pride in helping others, and they access new ideas in return. The old adage, “The more you give, the more you get back,” is central to who they are, and this includes sharing with volunteer leaders, staff, and other AEs. The world of “co-opetition” with neighboring AEs can be confusing, but when you seek ways to build each other up through collaborative opportunities instead of thinking you can do it all on your own, you’ve mastered this critical fundamental.

- **Successful AEs recognize their own strengths and weaknesses.** They build teams and relationships with others who are strong in the areas where they might be weak. Leaders don’t worry about someone else being stronger in an area they are not—they embrace it, and they understand that the product or outcome will be even better thanks to those complementary and combined strengths. AEs can’t be expected to have all the answers, but we can be expected to connect the people who can find the best solutions as a team.

As you read through this issue with its focus on relationship-building, remember to adjust your view to its gallery setting to see all of the opportunities surrounding you. There are no boundaries to the success you and your association can achieve through strong relationships and collaboration. ■



Janet Kane, RCE, CAE, CIPS, is CEO of MetroTex Association of REALTORS® in Dallas and chair of the Association Executives Committee.



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REALTORS® Bring Storybook Trail to Raleigh Park

North Carolina's Raleigh Regional Association of REALTORS® recently employed a Placemaking Grant from the National Association of REALTORS® to enhance Harnett County's outdoor amenities for children with the creation of a Storybook Trail in Cape Fear Shiner County Park.

RRAR worked with Harnett County Parks & Recreation, the Harnett County Library, and Raleigh Sign Design to create the trail's infrastructure and design materials for the project. The feature places pages from a children's book along the half-mile, 16-stop trail to encourage children to read and enjoy healthy outdoor activities simultaneously. The first book selected for the trail was *A House for Hermit Crab* by noted children's author Eric Carle, who died in May.



The RRAR team installs a storybook outpost.

"It has already gone a long way in building relationships with the members we have in that area and introduced us to local leaders," says Melissa Kolodziej, RCE, AHWD, C2EX, director of community relations for the association.

"REALTORS® live, work, and volunteer in their communities and take immense pride in working to improve them," adds



Books will be changed out periodically.

Brett Bushnell, 2021 RRAR president. "Placemaking helps foster healthier, more social, and economically viable communities. It helps people feel a strong stake in their neighborhoods and commit to making things better."

To find out more about NAR's Placemaking Grant program, visit realtorparty.realtor/placemaking. ■

PHOTOS COURTESY OF RRAR

Francks Wins Magel Award



Washington Association of REALTORS® CEO Steve Francks, RCE, CAE, was named the winner of the William R. Magel Award of Excellence

by the National Association of REALTORS® during its 2021 Legislative Meetings in May. The prestigious award is presented annually to an individual who has excelled

as a REALTOR® association executive and has an extensive record of participation, mentorship, and contributions.

Francks has served REALTORS® for more than 21 years with vision, enthusiasm, and integrity, WAR says, and has been recognized for his contributions and collaboration at a regional and national level. He has been involved extensively in NAR, including as 2011 NAR Association Executives Committee chair and as part of the Governance Game Changer PAG leadership team. He is

a member of the Dr. Almon R. (Bud) Smith, RCE, AE Leadership Society.

"Steve exemplifies all that the William R. Magel Award was created to recognize," Andrea Bushnell, CEO of the North Carolina Association of REALTORS®, says. "Through his passion and dedication to the industry and our members, Steve has gained a level of respect [that's] rarely achieved. It is this achievement that the William R. Magel Award is meant to honor, and no one is more deserving." ■

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Securus ID Offers Protection Against Identity Theft

State and local associations and members are now eligible for a free CyberAgent dark web scan report from Securus ID and Experian. The report searches databases of stolen user names, passwords, credit card numbers, and other information to find out if any have been compromised or offered for sale.

The Federal Trade Commission received 1.4 million reports of identity theft in 2020, twice the number seen in 2019. And with large-scale hacks affecting REALTOR® associations, pipelines, and other industries, now is the time for AEs and their members to shore up security.

Securus ID offers credit monitoring, antitheft insurance, and restoration and recovery services after an identity theft



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These 23 REALTOR® association executives earned their REALTOR® association Certified Executive 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. For designation requirements and more information, visit nar.realtor/rce.



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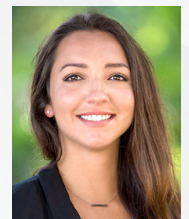
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Life After Lockdown

Post Corona posits that the pandemic may create opportunities for innovation.

Few would argue that COVID-19 will disappear without leaving an indelible mark on society. In *Post Corona: From Crisis to Opportunity*, Scott Galloway, a professor at New York University's Stern School of Business, illustrates ways in which the pandemic has accelerated broader trends that are shaping the future of business.

Drawing on his experience as a serial entrepreneur and the founder of companies including Red Envelope, Prophet, and L2, Galloway frames his analysis with two main theses: (1) The most enduring impact of the pandemic will be its role as an accelerant of trends; and (2) Disruption breeds opportunity—and the greater the disruption, the greater the opportunity.

The Digital Divide

Published early in the pandemic, *Post Corona* says COVID-19 may have accelerated negative trends more quickly and with disproportionate impact. This further tilted the scales of economic inequality in favor of the “haves” for individuals and businesses alike.

The marketplace effectively skipped a decade, Galloway says, and consumers are now living in the year 2030. In March 2020, e-commerce represented just 16% of all U.S. retail sales and was growing at

a rate of about 1% annually. Fast-forward eight weeks, and e-commerce had grown to 27% of retail.

The acceleration of the trend toward digital commerce will have lasting significance in the business environment. If there was any doubt that an organization marketing a product or service without a digital presence would be left behind, the pandemic erased it.

The Culling

Galloway's “strong get stronger” proposition includes examples of how cash-rich companies with high stock valuations are positioned to consolidate the market. Companies attempting triage in the aftermath should overcorrect and act fast, he says; perfection is the enemy of the good when it comes to emergency management.

Lessons that can translate to association management include acting quickly and without fear of making mistakes; doing whatever it takes to save members time, including making websites as efficient as possible; and expanding convenience in products and services. Marketing soundbites won't resonate if there's no “there” there, the book notes.

While many weaker companies failed in the early months of the pandemic, nine

tech companies increased in value by \$1.9 trillion. Of those, Galloway names Amazon, Apple, Facebook, and Google as “The Big Four” that are now too big to fail, arguing that as tech companies scale up, their integration into our lives becomes a threat.

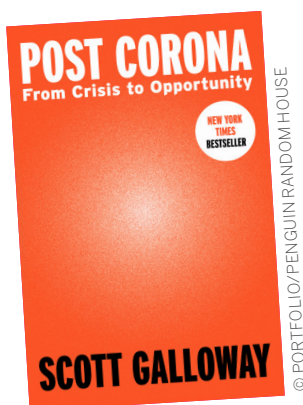
Other Disruptors

There is still opportunity in upheaval, though. When there is rapid increase in price without an increase in value or innovation, Galloway says, industries are ripe for disruption. He warns against venture capital-funded “Fake it 'til you make it” business models and pseudo innovations that offer added features without adding real value.

Higher education has a huge disruptability index, Galloway says. While offering little change in their value proposition, colleges and universities have instituted tuition increases of 1,400% over the last 40 years. And those price increases have come without fully addressing inequities in access to education—similar to real estate's recent reckoning with its role in creating unequal access to housing.

Galloway concludes that a renewed sense of community and collaboration is needed to address societal inequities. True capitalism, he says, turns selfishness into wealth and stakeholder value, setting the stage for altruistic behavior that helps lift all boats.

Post Corona is widely available from online bookstores. ■



The marketplace effectively skipped a decade, and consumers are now living in the year 2030.



Ann Gutkin, RCE, is vice president of communications for the Northern Virginia Association of REALTORS®.



SHARED

PURPOSE

Good relationships between AEs, staff, and volunteer leaders are the key to helping associations flourish.

BY M. DIANE McCORMICK

Strong, sustainable relationships propel REALTOR® associations forward, but the bonds between staff and volunteer leaders can't be left to chance. That's the consensus of AEs representing a variety of local and state associations. The duty of AEs is to build cultures of trust and communication in which volunteers and staff can work together for the good of the organization.

Working with volunteer leaders "keeps the job fresh," says Washington REALTORS® CEO Steve Francks. "I love my job, [and] a big part of it is the people I get to work with. When it's clicking and we're sharing ideas and recognizing each other's strengths and supporting each other, it's really fun. This is fun."

Training and Continuity

The voices of volunteer leaders drive strategic plans that define association goals—"what makes them more effective in their communities, what helps them serve their clients better, and what makes buying a house or selling a house a good experience," says Mississippi Association of REALTORS® CEO Beth Hansen. "Our staff job is to support those goals."

Leadership training defines the roles of association volunteers and establishes expectations for their participation. In Washington state, programs spool out year-round to instill a shared understanding of the association's purpose and create "a culture of partnership and trust and mutual respect at every level," Francks says.

The Northeast Louisiana Association of REALTORS® uses a "leadership ladder" to train volunteers for the next level before they take a new office. Passing the baton like this can help forward-looking initiatives. "Your hope is that you can help the one who's in now join ideas with the one who's coming up behind, so you will have a consistent legacy," says CEO Alice Clark, RCE.

In recent years, the Northern Virginia Association of REALTORS® has expanded its roster of advisory groups and forums while also attracting fresh perspectives by trimming volunteers' terms in office from lifetime to a single year.

"We took a philosophical approach that everybody who applies gets a spot somewhere," says CEO Ryan McLaughlin. "It's getting harder now that we're getting more applicants, but we're making it happen."

Close Ties

Once you have good volunteer leaders, how do you keep them engaged? By communicating clearly and consistently, creating well-defined roles for volunteer leaders and staff alike, and aligning everyone and their ideas with the association's strategic plan.

"We try to start early to create an atmosphere that we are all working together," McLaughlin says. "Our leadership team is constantly communicating. We're starting that communication very early and doing it often, so by the time the secretary-treasurer works their way up to president, we're all a team, and we can trust each other."

The following can help AEs build close ties among volunteer leaders, members, and staff:

- **Communication.** Vice President of Communications & Marketing Suzanne Westrum weaves a strong thread of communication into the fabric of the San Antonio Board of REALTORS®' leadership training programs. Through direct conversations with volunteer leaders, she reinforces the association's strategic goals and public standing. "Those relationships are key to understanding what our members want, what they need, and what they're not going to like," Westrum says.
- **Transparency.** Openness assures members and leadership "that you're not hiding anything," says Clark. Writing

openness into policy—for instance, establishing procedures for sharing financial records with members—builds confidence and prevents misunderstandings that can lead to hard feelings.

- **Leveraging strengths.** Early in San Antonio Board of REALTORS® leadership classes, participants discover their primary talents using a strengths-finding system. When most members of the board discovered that they shared certain strengths, “even they said we needed to get different personalities [involved],” Westrum says.
- **Member-to-member advice.** In SABR’s media spokesperson training, experienced members “bring realism” to greener members. “I find that peer-to-peer is way more influential than me saying something,” Westrum says.

Easing Conflicts

Occasionally, leaders clash. AEs should be flexible and level-headed and present a unified front with top volunteer leaders to demonstrate support for board decisions. “You have to do everything according to what’s in the best interest of the general membership,” Westrum says.

At NVAR, a culture of open dialogue and trust lets leaders know that “it’s OK to share opinions and have conflict, knowing that we’re going to come around to a consensus,” McLaughlin says. Expectations of volunteers and staff are baked into NVAR training. Responsibility is assigned according to association management guru Bob Harris’ mantra: “Boards govern, staff manages.”

Westrum doesn’t just resolve conflicts; she also ferrets out the underlying issues. When NVAR triggered backlash from members after endorsing candidates in a city council election, for example, she learned that it wasn’t the endorsements that members minded. They simply feared that releasing endorsements publicly would drive a wedge between them and their clients.

Preventing conflict demands meticulous documentation. “People have different memories of things, and part of our role as staff is to keep track of that,” Westrum says. “It helps the board continue to see things factually and make better decisions. We make sure they have all the information they need when they’re making decisions, so they’re not just relying on hearsay or someone’s memory from two years ago.”

Financial Footing

When money is at stake, trust is paramount. “There’s nothing that will derail an association from its key goals of serving its members and having a strategic plan faster than having to stop everything and deal with financial issues,” says Elizabeth Breen, AE, Santa Ynez Valley Association of REALTORS® in California.

AEs should take the lead in ensuring financial trust, she says. Recognize that volunteer leaders have a fiduciary responsibility to their associations but often need training in reading financial statements and spotting anomalies. “When you overshare and when you overcoach, it builds a huge amount of trust,” Breen says.

Breen’s treasurer reviews the association’s financial report with her before board meetings and then gives the report to the board. This gives board members “confidence that your treasurer is paying attention to the financials,” she says.

Clark became AE of NLAR at a critical nadir in leaders’ financial trust: A previous AE had embezzled from the association’s accounts. “They were at the point of getting the lights turned off,” she says. In the wake of the incident, the association developed strict financial policies with guidance from legal counsel and National Association of REALTORS® models.

Rebuilding trust takes time, adherence to protocols, and “being an open book to the executive committee,” Clark says. “My actions laid the foundation for them to be able to trust me for 10 years now. Everyone—especially in leadership—has to know what the financial policy is.”

At the Mississippi Association of REALTORS®, an operations committee oversees financial issues, Hansen says. The CFO prepares the budget and reviews it with the committee “so they understand where the money is going and [where] income is anticipated,” she says.

If there are budget changes to present to the board, the committee is brought into the discussion. “We want that examination and want it to be transparent,” she says. “It’s their association. We want them to be comfortable with how money is being spent to accomplish the goals of the association.”

Board members’ due diligence requires knowledge of key performance indicators that can alert leaders to a need for action, says Rob Olmstead, RCE, e-PRO, C2EX, AHWD, finance director of the Pinellas REALTOR® Organization, Central Pasco REALTOR® Organization in Florida, and Virgin Islands Territory Association of REALTORS®.

“If your revenues are lower than expected, for example, what is the reason?” he asks. “Can we correct any problems or do things differently going forward?”

Ripple Effects

Overcommunicating to eliminate ambiguity helps build trust that carries into all aspects of the AE’s job, says Breen. “They look at you and think, ‘That’s an honest, trustworthy person who is a professional,’” she says. Once that’s established, “You have the ability, perhaps, to have more power in other areas.”

The Transparency Paradox

With widespread acceptance that the future of business meetings will be a combination of in-person and virtual, questions about transparency in governance have arisen among REALTOR® associations and their members. These questions are shaking up our long-held understanding of when to meet in executive sessions and who can participate.

The question is whether deliberations on sensitive topics should be done “in public.” How should associations respond to member requests for more openness, communication, and accountability from their elected leaders, given the expanded capacity to reach people?

Robert’s Rules of Order dictates that board meetings are generally open to the members of the board and any staff or advisers they choose to invite. But the board may opt to close meetings to rank-and-file members or the public whenever it sees fit.

In the name of openness and transparency, many professional and trade associations have decided that board meetings should be open to members and have added this provision to their bylaws. Many of us believe that transparency and openness are the best default position and should inform the way an association conducts business.

Maryland REALTORS® has always allowed any member to observe board meetings. When we went virtual, however, we needed to make accommodations for attendees who were not participants. We now livestream board and executive committee meetings as webinars and have seen an encouraging increase in member engagement in association governance.

Policies and practices established in the name of transparency have benefits. That said, they can be counterproductive when applied without regard to board privacy. Boards function most effectively when they can balance transparency and privacy.

Inhibiting Information Exchange

A theory called the Transparency Paradox says it’s critical for leaders to temper transparency with zones of privacy

because being watched can result in less-than-optimal performance. According to the theory, people operate most effectively in environments where they can be open with one another about what they know and don’t know, change their minds, and place more importance on the success of the group than on their own performance.

Boards might respond to member scrutiny by “performing” as expected in public meetings—simply presenting reports or discussing noncontroversial topics. They then might call executive sessions more often to “hide” their debate and actions while dealing with substantive issues, representing a decrease in transparency to would-be observers. Hence the paradox.

To avoid a climate that inhibits discourse, board members should be open and intentional—transparent—in seeking all available information about members’ needs and interests. But they should keep board deliberations, member voting records, and other sensitive decisions private to allow the board to consider diverse points of view and have the difficult conversations that are essential to organizational performance.

When you encounter a problem of sufficient complexity that the board should be free to discuss it privately, an executive session is appropriate to create a zone of privacy for a free and frank discussion. Association executives should participate in all executive sessions unless the meeting pertains to their own salary or performance.

Members’ desire for transparency can be satisfied with the tools and resources used to gather information, as well as by the timely communication of important board decisions. But you can use executive sessions strategically to provide a zone of comfort for decision-makers. ■



Chuck Kasky, Esq., RCE, is CEO of Maryland REALTORS® in Annapolis, Md.

And trusting relationships with volunteer leaders make for stronger associations, AEs agree. Hansen notes that she is not a real estate licensee and has never shown a home or written a contract, so she depends on her members to share ideas and provide feedback about how the association is doing.

“They are gifting us with their time and their skills and their abilities,” she says. “That is such a wonderful asset to have.

You do what you can to preserve their involvement and direct them in ways that are beneficial to the association.” ■



M. Diane McCormick is a Pennsylvania-based freelance writer and author of *Well-Behaved Taverns Seldom Make History*.





In the SAME BOAT

Collaboration helps keep
REALTOR® associations in sync
with member needs.

BY KIMBERLY R. PONTIUS

Any association executive who has been around for a minute or two has likely mastered the art of collaboration. Some of the most fruitful collaborations happen between local and state REALTOR® associations.

Someone once told me that the difference between collaboration and cooperation is that collaboration is the art of getting the right team in the boat, while cooperation is getting everyone on that team to row in the same direction and at the same speed. The relationship between the two skills is a symbiotic one, and AEs need to practice them frequently to become proficient.

Christine Windle, director of community outreach for the National Association of REALTORS®, says AEs can build collaborations by establishing robust local association networks and connecting with state associations. “No association is an island,” she says. “Even though each one serves a specific region, we share common goals. AEs of REALTOR® associations large and small must keep in mind that collaboration is key in maximizing value back to members.”

Partnership Is Key

One association that has done so successfully is the 220-member Harlingen Board of REALTORS® in southeast Texas. HBR is one of a group of four small- to medium-sized associations in the region that leverage shared services, programs, and some events.

Whether the Harlingen association is running an Aristotle virtual campaign to raise money for a food bank, staging Habitat for Humanity casino nights, filing for NAR grants, or cost-sharing on educational events, partnering with other REALTOR® associations and colleagues has been key to HBR's success.

AE Ana Becerra says HBR relies heavily on the state association. Texas REALTORS® does an excellent job of communicating in spite of the state's sheer size, she says, and has been great at "meeting the local associations where they are."

Long before the pandemic, HBR worked with Texas REALTORS® and other associations in the Grand Valley area to recruit local instructors and to broadcast seminars across the state. "I've been with the association since I was 16 years old, and I learned collaboration by watching and learning from others," Becerra says.

Prioritize Local Connections

Angela Shields, CEO of the 33,000-member Tennessee REALTORS® in Nashville, says the bulk of TR's work is legislative. But having been a local AE for many years, she believes in helping local organizations whenever possible.

Before COVID-19, TR did state association leadership "roadshows," supporting local events with leadership meet-and-greets and RPAC events such as the PAC-a-Thon. Shields says these activities will resume as the pandemic abates. TR has met with local boards every other week on Zoom to find out how it can be of assistance.

Not every local association needs the same level of attention. With those capable of handling things on their own, the state association tries not to come across as a competitor. For example, TR won't use a local association's sponsors when it comes to events or fundraising unless there is a noninvasive partnership. "We focus on bigger projects to bring members together," Shields says. "We like to collaborate on all projects. The locals keep us grounded with the members."

Look for Mutual Benefits

Already substantial before the pandemic, reciprocity between the Coastal Carolinas Association of REALTORS® and Carolina REALTORS® has expanded in the last 18 months, says CCAR CEO Laura Crowther. Meetings between the state association's CEO and local associations increased in frequency and in content value, she says.

Having served as a senior vice president at CR, Crowther has a great relationship with the state association. She says local associations shouldn't view their role as subservient to the state organization, but instead view it as a partnership with great potential for reciprocity. "With 4,600 members, the grassroots

information we bring to the table is vital to our state association," she says. "There are so many local issues, we really have to sing from the same sheet of music."

Collaboration doesn't stop at the state line, however. CCAR engages with REALTOR® associations in Canada to enhance economic development in her region through participation in the annual CanAm Days event in Myrtle Beach. Canada is the United States' largest trading partner, and many Canadians look to coastal South Carolina for vacation and retirement homes.

CCAR has also participated in the International Real Estate Conference (MIPIM) in Cannes, France, partnering with David Bennett, CEO of the Pinellas REALTOR® organization in Florida. Such high-level collaborations deliver innovative member services and make both regions and their states more visible to emerging global markets, Crowther says.

Build Grassroots Strength

Working with local government affairs directors is a reciprocal effort in Pennsylvania, where the state REALTOR® association acknowledges that grassroots efforts are the best indicator of business health. While local associations in the state employ eight or nine GADs themselves, Pennsylvania REALTORS® contracts government affairs services to 25 local associations with small memberships.

Working with local associations on grants is another big part of Pennsylvania REALTORS® collaborative efforts, says Field Operations and Grassroots Manager Chuck Liedike. One recent win at the state level was a grant that covers costs related to sewer lateral service, the result of cooperation with multiple stakeholders. An infrastructure accomplishment for property owners like this really shows off REALTOR® value, Liedike says.

Liedike is big on building the REALTOR® brand. "We're pushing strong on getting REALTORS® to get involved, and we're working with local associations, especially in the rural regions, to find and develop fresh new talent among REALTORS® for new community leadership at the local level," he says.

Local and state REALTOR® associations around the country are getting more of the right people in the boat and getting them all to row in sync. Even through the choppy waters of the pandemic, that willingness to work together has helped more REALTOR® associations advance toward their goals. ■



Kimberly R. Pontius, CAE, RCE, GREEN, e-PRO, is CEO of Aspire North REALTORS® and Northern Great Lakes REALTORS® MLS in Traverse City, Michigan.

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Relationship Repair and Reset

Eliminate the toxicity that can arise with workplace conflicts.

Even if you're good at developing relationships, you may find yourself in a situation where a work relationship has been impacted by hidden agendas, conflicts, or personality clashes. Any further development to the relationship will be unlikely until you ask yourself three questions: Do I want to repair this relationship? Can it be repaired? How do I repair it? Let's look at each.

Do I Want to Repair It?

Years ago, I facilitated a training session in which we discussed workplace relationships. One of the participants said, "I need people to get my job done. I can't do it without them." There are times, however, when people in positions of authority or influence can be toxic. If we need the person in question to do our job well, we need to repair the relationship to protect ourselves. The common advice says to get the toxic person out of your life, but in a work setting, that may not be possible. We need to make the best of a difficult situation.

Can It Be Repaired?

Relationships can be repaired when we approach the other individual with respect for their needs and interests. To effectively repair a relationship gone wrong, you need to understand what the other person wants and needs. You might have to set aside your own needs to do the right thing, but if all goes well, your needs and wants can still be met.

How Do I Repair It?

In attempting to repair a relationship, you will wear two hats: one as negotiator and one as mediator. There are four basic steps to this process:

1. Find a time to talk. First, there's the approach: "Do you have a minute? Can we talk?" Then, offer the issue statement: "We've hit some snags. I'm concerned that progress is being slowed because we're not communicating well." Then, a request: "I'd like to meet with you at your convenience to talk and find ways to improve our teamwork. Are you willing?"

The other person may be reluctant; to sell the idea, acknowledge the objection, show how meeting benefits the other person's self-interest, and repeat the request. For example, say, "I understand your concern. My hunch is that we may not totally understand each other's point of view. I'd like to understand yours better. Can we give it a try?"

Suggest some guidelines for the discussion: "Let's limit interruptions so we can focus on the issue at hand. And let's agree to try to find a solution we can both accept."

2. Set the context. This involves removing any landmines that could blow up the effort to talk. Find a quiet place where interruptions are limited, make sure it's comfortable, and consider having food and beverages available.

3. Talk it out. First, express appreciation: "Thanks for taking the time to meet. I'm hopeful we can find a solution that's acceptable to both of us if we commit to staying at it long enough."

Next, identify the issue—and it should always be strictly a business issue: "We've hit some snags on the committee. I'm concerned progress is being slowed because we aren't communicating well." Or "I'd like us to resolve the difficulty we appear to be having in working together to ensure a good business outcome."

Third, invite dialogue: "How do you see it? Help me understand your view of the situation." Support conciliatory gestures by acknowledging any statement of vulnerability the other party volunteers. Say something such as, "I appreciate your saying that," then offer something that establishes reciprocity.

Then, wait for the breakthrough. If you bring empathy, emotional intelligence, and active listening to the conversation, a breakthrough is almost inevitable, even with the most toxic individuals.

4. Make a deal. You'll know you've made a deal when you find a solution with shared sacrifices and compromise that benefit the relationship. A deal should include specific directives on what each of you will do.

Don't keep score. The goal is not to resolve the past but to ensure a good business relationship going forward. If you are forced to discuss the past, focus on your interactions with the other party that contributed to the breakdown. This will help you understand what you can change to move forward. Don't try to change the other person, and don't get into the blame game.

Once the relationship is mended or you have discovered a workaround, use the experience to build stronger relationships with others going forward. ■



Carole Kaptur, SHRM-SCP, HCS, GRI, C2EX, is a consultant in NAR's Strategic Association Management Services, Talent Development and Resources group.



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Gone Phishing

Look for red flags and take action to protect your association from cybercrime.

REALTOR® associations and MLSs are among cyber criminals' latest targets. Recently, fraudsters used a spoofed email address to send fake invoices that so closely resembled a vendor's that several REALTOR® associations fell prey to the scam, losing tens of thousands of dollars.

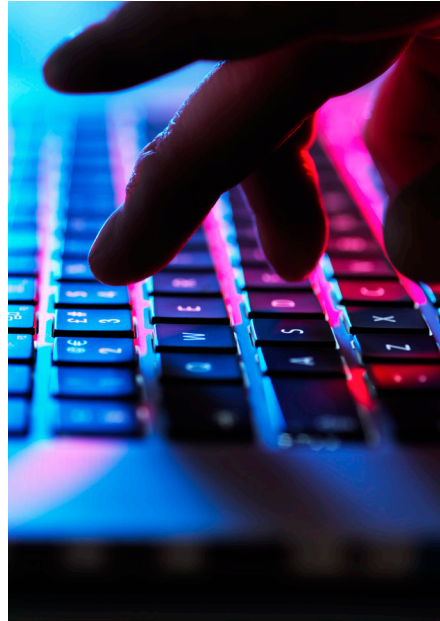
A record number of internet crime complaints were filed in 2020, the FBI says, with reported losses exceeding \$4.1 billion nationwide. Business email compromises accounted for 43% of the losses, and they included compromises of personal and company emails and requests for W-2 information. "Phishing" scams in which cyber criminals try to trick victims into giving away confidential information, such as bank account details and login credentials, are also common.

The continuing rise in internet crime emphasizes the importance of remaining vigilant and training staff to spot red flags. Be suspicious when receiving unusual requests, links, and attachments, and always verify that you're transacting business with a trusted vendor.

One of the best tools to combat internet fraud is at your fingertips: the telephone. Whenever an external email requesting payment is received (especially when there's a change in payment instructions), the request should be verified using a known phone number for the vendor.

This simple step can help avoid devastating scenarios like a recent instance in which a staff member thought she was emailing her association's CEO for approval of a large invoice, but she instead emailed the hacker, who, of course, approved the payment.

An association may also consider hiring an outside firm to conduct phishing awareness training.



Exercise Prudence

Not only is it smart for businesses to exercise prudence and safeguard against scams, the courts expect them to do so. Last year, in *Jetcrete North America LP v. Austin Truck & Equipment Ltd.*, 484 F. Supp.3d 915 (D. Nev. 2020), the U.S. District Court ruled against a customer who fell victim to fraudulent wiring instructions and lost hundreds of thousands of dollars, even though the vendor's system had been hacked.

The court found that the vendor had taken reasonable steps to protect its email system, and that the customer also had a responsibility to use reasonable care, especially when red flags such as last-minute wiring instructions and poorly written emails should have alerted the customer to verify the transaction. The court noted that a simple phone call would have uncovered the fraud.

If you discover that your association has fallen victim to a cybercrime even

after taking all reasonable precautions, act quickly to mitigate losses and repair the damage by taking the following steps:

- Contact your bank immediately to ask it to recall or stop the payment.
- File a detailed complaint with the FBI's Internet Crime Complaint Center (ic3.gov), ideally within 72 hours of the loss.
- Report the incident to your local FBI office and local law enforcement.
- Report the incident to Chubb's cyber hotline (800-817-2665) to be connected with a specialist who can help triage the incident.

The National Association of REALTORS® Insurance Program provides coverage for losses related to cyber incidents such as network breaches, ransomware, and email hacks, subject to a \$1 million limit. Payment of a fraudulent invoice in the absence of a covered cyber incident is considered social engineering fraud, subject to a crime loss limit of \$10,000. Additional crime loss coverage up to \$200,000 to help cover fraudulent payment losses is available through the Excess Insurance Program; associations and MLSs can purchase additional coverage from Jan. 1 to April 1 each year.

Cybercrime is real, and it's hitting close to home. Knowing the warning signs and remaining vigilant can help your association avoid being a cyber thief's next victim. Check out all of NAR's cyber resources at nar.realtor/nar-insurance-program. ■



Deanne Rymarowicz is an associate counsel in the legal affairs office of NAR. She can be reached via email at drymarowicz@nar.realtor.

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The New Realities of RPAC Fundraising

5 strategies to get the money flowing before fall.

The COVID-19 pandemic has driven us to get creative with day-to-day membership services, and that includes RPAC fundraising. Initially, at least, REALTOR® associations nationwide had great success with virtual fundraisers, pointing to the vital role the REALTORS® Political Action Committee plays in protecting the industry as a reason to invest.

Now, after more than a year, it's getting more difficult to attract members to virtual events. They're busier than ever and just plain Zoomed-out. But we still have fundraising goals to meet, and members still need representation. Here are a few suggestions that can help shore up fundraising:

1. Keep plugging away at virtual fundraising. I know—I just said that members are Zoomed-out, and I meant it. But if you can't get them to participate in a two-hour virtual cooking class or a virtual bourbon tasting, try a new angle. Suggest something that provides them with real value in a short amount of time.

My association is having a virtual raffle for a bushel of crabs, and we're using Aristotle to sell tickets. We think it will be a hit because (1) It's quick and easy; (2) Marylanders love to pick crabs; and (3) The going price for a bushel of large crabs is about \$400. Most states prohibit or heavily regulate raffles, so remember to check your state gaming laws before undertaking such a fundraiser.

There are lots of options. Visit realtorparty.realtor to learn about email campaigns, phone banking, and online events such as silent auctions.

2. Provide opportunities for virtual recognition. You may not be doing as many virtual events now, but you're still holding virtual board and committee meetings, so make sure RPAC investors are getting recognition. As host, you can add "Major Investor" or "RPAC Investor" to the end of their Zoom names. Also be sure to recognize big donors on your website and social media pages. As long as you're not soliciting investments, you can thank investors publicly.

Are you currently holding virtual new member orientations? Cultivate new investors by recognizing attendees who have already contributed to RPAC.

3. Don't forget in-person recognitions. If you're planning in-person events, recognize RPAC investors there, too. Whether you put foil stars on your tabletop name tents or ask investors to stand and be recognized during general membership meetings, give them a plug.

4. Get brokers involved. REALTORS® love friendly competition, so why not get brokers involved in an RPAC office challenge? Give away prizes to the offices with the highest dollar amount raised, highest participation rate, most major investors, and so on. Buy lunch, give out trophies, or whatever you think will motivate them. Make it clear that any enticements offered are for individual, voluntary RPAC contributions and not contributions from the brokerage itself, since corporate/business entities are unable to give to RPAC.

5. Use the mail. Many of your members get more than 100 emails per day and open maybe one-quarter of them. But almost everyone watches for postal mail, so

receiving a gift for an RPAC investment will be memorable. The Maryland association provides us with \$99 Club and Capitol Club (\$250) pins to send to those members, and we send Capitol Club members and major investors REALTOR®-branded gifts. Remember that when the association pays for such enticements, it must apply the one-third rule, which says the association may pay part of the entertainment and enticement costs from its treasury as long as the amount paid is equal to or less than one-third of the total amount raised at the RPAC event.

If you want to see dues contributions skyrocket, invest in a postcard mailer. Before last year's dues billing, my association worked with National Association of REALTORS® partner Real Strategies to send two postcards to members. The first explained how RPAC fought for them throughout the pandemic; the second made the case for investing in RPAC with their dues. By the time we wrapped up billing, HCAR had increased its participation rate 25% compared to the year prior.

Members need to be reminded why investing in RPAC is vital to being a member. Not only will a postcard further educate them on membership value, it will give your association a healthy head start on crushing its fundraising goals before the year begins. Start planning now! ■



Sarah Rayne, RCE, AHWD, e-PRO, C2EX, is director of operations for the Howard County Association of REALTORS® in Columbia, Md.

Beat the Clock

Help your members meet Code of Ethics training requirements.

NAR's Board of Directors approved a change to its Code of Ethics training requirement in 2019, making the training mandatory for members every three years rather than every two. REALTORS® have until Dec. 31 of this year to complete the training—and while it requires only about 2.5 hours of instruction, some REALTORS® will scramble to satisfy the requirement, creating a challenge for association executives.

Associations must use every communication vehicle at their disposal to remind members of the requirement—callouts on their websites, email alerts, social media posts, text messages, and more. Still, a few REALTORS® will be shocked and dismayed when their memberships are temporarily suspended Jan. 1.

"Local associations are responsible for tracking the requirement," says Tonya Deskins, vice president of member services at West and SouthEast REALTORS® of the Valley in Arizona. "Associations spend a great deal of time making sure our members remember that it's different than a licensing requirement."

Time Is of the Essence

The Scottsdale Area Association of REALTORS® in Arizona reminds members of the requirement and deadline whenever the opportunity arises. "If one of my staff members is on the phone with a member, they pull up the member's record and check as they're talking," says CEO Rebecca Grossman, RCE, GREEN. "That allows them to have the conversation there and then."

Attention-getting visuals help, she says. One SAAR has used in the past employs a famous still from *The Wizard of Oz* showing



Use anything you can to get their attention.

—Carol C. Seal, CEO and Executive Vice President, Greater Chattanooga REALTORS®

the Wicked Witch of the West holding an hourglass to indicate that time is running out. NAR offers resources to help association executives create eye-catching social posts and emails, Grossman notes, and fellow AEs may be able to offer suggestions. "We have more than 8,500 primary members to track," she says. "You send an email to 8,500 people, and how many are actually going to read it?"

"Use anything you can to get their attention, from funny social posts to direct messaging with a subject line to the effect of 'Act Now to Avoid Suspension of Membership Privileges,'" says Carol C. Seal, RCE, AHWD, C2EX, e-PRO, CEO and executive vice president of Greater Chattanooga REALTORS® in Tennessee. "Even if you think you don't have enough staff to make individual phone calls, you'll need to find a way."

"We have added temporary staff to assist with documenting data, collecting data, and reaching out to individual members, as well as reaching out to brokerages to let [designated REALTORS®] know that the requirement has not been met," Deskins says.

Tout Your Training

To encourage on-time satisfaction of the requirement, "provide many different

options for members," Deskins says. "Offer online, video, live classroom, and live/remote classroom training."

NAR offers a course, as do many state and local associations. Some real estate schools may also offer courses claiming to satisfy NAR's training requirements, but AEs must partner with outside entities to ensure that their courses are sufficient to qualify for NAR credit.

If members get suspended (and some will), offer makeup training sessions in the first weeks of January so that memberships can be reactivated as quickly as possible, Deskins says. A suspension doesn't mean that a member is suddenly freed from the strictures of the Code of Ethics or dues payments, she notes.

Seal suggests creating incentives to get members into compliance early. "If you can afford to do a prize drawing for everyone who completes the training by X date, it's a win-win," she says. "Members have the chance to win an awesome prize, and you have fewer people to worry over as the deadline draws near."

Frame the requirement as a want-to-do rather than a have-to-do, Grossman adds. "Make sure you and your staff present the requirement as an opportunity to learn."

The recording of a May 26 webinar, "Stay Ahead of the Curve as the Code of Ethics Training Deadline Approaches!" is available at nar.realtor/coetrainingwebinar. ■



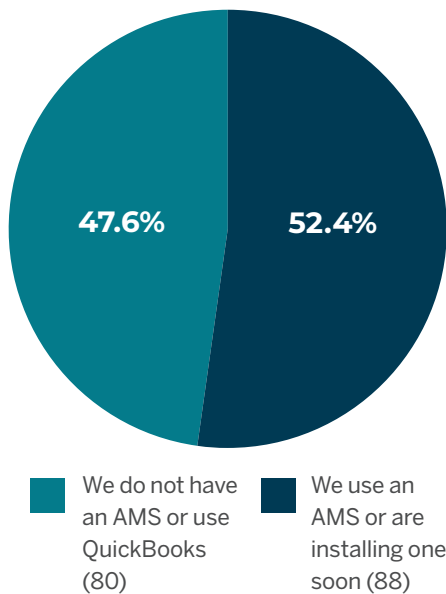
Ian P. Murphy is senior editor of REALTOR® AE magazine.

Software That Facilitates Member Service

An association management software system might be an indispensable tool for your organization.

As the executive officer and sole staff member for what I call a microassociation (fewer than 100 members), I know how valuable having an association management software (AMS) system can be. But not every association takes advantage of such a system, so I thought I would contact the various vendors, hear their pitches, and put them together in a nice little presentation.

Then, I conducted an informal poll at the AEI Year-Round Facebook page. Here's where association executives stand with AMS systems:



A substantial number of respondents added, "We can't/board doesn't think we can afford an AMS," and a handful said "What's an AMS?" That's a lot of AEs who either don't have an AMS, don't know what one is, or are making do with a less-than-ideal option.

Support Systems

Seven brands were represented among AEs reporting they use an AMS, with Growth Zone and Navica Streamline being the leading options. Here's a brief snapshot of the systems, and what size association they best accommodate (S = under 500 members; M = 500–1,500 members; L = 501–5,000 members; Mega = 5,000+ members).

- **Blacknight/Lamps (S, L)** Integrated software, data, and analytics solutions automate processes across the homeownership life cycle, helping achieve strategic goals. www.blackknightinc.com
- **Fonteva (Mega)**. Built on the Salesforce customer relationship management platform, Fonteva for Associations offers a flexible, configurable tool that supports multiple aspects of trade association management. www.fonteva.com/trade-associations
- **Growth Zone (S, M, L)**. The first AMS to offer a built-in marketing automation module, Growth Zone is designed for efficiency and—what else?—growth. www.growthzone.com
- **MMSI (M, L)**. MMSI's Membership Director is built on an accounting platform to guarantee standard accounting practices and full audit trails, and it adapts easily to evolving member needs. www.gommsi.com
- **Navica Streamline (S, M, L)**. Emphasizing client service, Systems Engineering Inc. (SEI) has focused on software development for the real estate industry since 1975. www.seisystems.com
- **RAMCO (M, L, Mega)**. A comprehensive, flexible membership data solution for REALTOR® associations and MLSs that can help reduce ongoing membership system and development costs. www.ramcoams.com
- **Rapattoni (S, M, L)**. Designed exclusively for the real estate industry, the latest version of Rapattoni Magic-Cloud offers an intuitive interface and powerful new features. www.rapattoni.com

So I took on an experiment: I set out to run our association for two weeks without using our AMS. That way, I could better explain the benefits and help AEs explain the benefits to their leadership.

What was it like? Pure hell. I nearly quit, then remembered that I had done this to myself. I could go into excruciating detail about how challenging it was, but I'd rather focus on what our members didn't

get from our association due to my lack of resources and time.

Here's just some of what they missed:

- A real person to answer the phones
- Prompt return of emails, text messages, and voicemails
- Prompt fulfillment of requests
- On-time monthly billings
- Complete and prompt committee meeting agendas and minutes
- Quick follow-up on action items
- Timely monthly reconciliations

Simply put, this board functions best with an AMS. Everything I tried to do not only took longer, but some tasks got so messy that members started asking questions. That's when I realized that

Having an AMS is one of the best member benefits any association can offer.

having an AMS is one of the best member benefits any association can offer.

I'm at my best when I can tackle projects in an organized fashion, everything I need is at my fingertips, my databases sync automatically, billing is automated, and I'm confident that every member is getting the infor-

mation they need (even if they say, "I didn't get that").

The late Harley E. Rouda Sr., a REALTOR® from Ohio who served as president of the National Association of REALTORS® in 1991, once said, "If real estate is your career, then politics is your business." I would add that if association management is your business, an AMS is the digital Swiss Army knife that helps you get things done. ■





Misty Miller, RCE, EPRO, AHWD, C2EX is executive officer for the Ashland Board of REALTORS® in Ohio.





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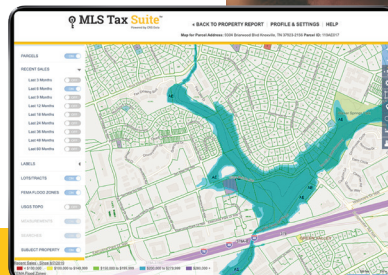
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All Aboard

Board orientation can help get everyone involved with a REALTOR® association working toward the same goals.

Association executives are responsible for building relationships with volunteer leaders that lead to high levels of commitment, accountability, and career satisfaction. And that means we must educate new leaders about the association, how it works, and their roles in it. Volunteer leaders can't grow and be effective in their roles without this knowledge.

That's why an annual board of directors orientation is a must. I co-teach HomeTown's with a volunteer leader who has experience at the local, state, and national level. That way, we can highlight the differences between volunteer leader and paid staff roles.

We usually hold board orientation sessions the same day as the first board meeting of the year, though we can accommodate members who prefer to have orientation after the fall elections and before the first meeting of the year. Orientation can be held live or virtually; if it's a live session, we provide breakfast and lunch.

We cover the following key topics:

- Welcome and introductions
- Expectations and goals for the day
- The REALTOR® family: local, state, and national governance and structure
- Local association leadership: roles and goals of board committees and staff
- Board of directors' manual, governing documents, and statements
- Statement of purpose and mission
- Bylaws and antitrust documents
- Confidentiality agreements
- Policy manual and document retention
- Job descriptions for staff, directors, officers, and committee chairs
- Whistleblower and conflict of interest policies



- Strategic plan

I also recommend all directors, officers, executives, and staff complete the REALTORS® Excelling in Association Leadership (R.E.A.L.) course offered by the National Association of REALTORS®. R.E.A.L. is free and meets three hours of professional development required toward Core Standards.

The course is worth 10 points toward the REALTOR® association Certified Executive designation and five points toward RCE recertification, but R.E.A.L. is also a great tool to get potential volunteer leaders who are looking to expand their involvement with the association up to speed. It covers:

- Real estate issues and trends
- Enhancing leadership skills
- Meetings management
- Governing documents and policies
- Legal and regulatory activities
- Visioning, planning, and budgeting

Depending on the content, your board orientation program might meet the leadership development requirement under Core Standards; it would be up to your state association to determine whether the program meets the standard.

The viability of a REALTOR® association is no longer dependent on the technolo-

The viability of a REALTOR® association is no longer dependent on the technologies you use, where you operate, or what you create.

gies you use, where you operate, or what you create. Rather, it's your association's ability to adapt, evolve, and grow in today's business environment—and that is dependent on the culture that volunteer leaders and staff are able to build together.

We're here to manage day-to-day association operations, but those functions are always in service to REALTORS®' needs. Volunteer leaders help steer our associations to be vital resources for advancing professionalism and success. We can't do our jobs without them. ■



Heather Wiedrich, RCE, e-PRO, C2EX, is association executive at HomeTown Association of REALTORS® in Sycamore and Sterling, Ill.



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Sign up today at nar.realtor/C2EX/challenge.



Culture of Inclusion

HCAR's Jessica Coates delivers value to her growing membership and community through collaboration and partnership.

After serving several years at the Birmingham Association of REALTORS®, Alabama native Jessica Coates, RCE, CIPS, e-PRO, C2EX, relocated to Maryland in 2018 to take the CEO role at the Howard County Association of REALTORS®. There, she launched a campaign to better engage the membership.

Coates has recast HCAR as a community resource through strategic partnerships such as an educational program for first-time homebuyers hosted with the Consumer Credit Counseling Service. Coates currently chairs the AE Young Professionals Network Forum and will be vice chair of the Association Executives Committee in 2022.

REALTOR® AE asked Coates about building relationships within one's own association, with other REALTOR® associations, and with the community at large.

Q: What have you found effective in building and maintaining trusting relationships?

Coates: The most effective strategy has been to keep transparent and consistent communication a priority. I have been able to build trust, establish respect, and better understand who we are as a team.

We want to give members an experience—not just a robotic “Hi, how can I help you?” Training isn't a luxury anymore; our staffers are facilitators in establishing trust and understanding our mission to serve members.

Q: How were you able to diversify HCAR's membership and encourage involvement?

Coates: I've worked to build an inclusive, welcoming environment. We have been



The work culture you create determines the kind of leaders you attract.

—Jessica Coates

running internal campaigns to entice leaders to volunteer more. It's easy to tap different people and groups who have never been targeted for leadership, but it's harder to look in the mirror and recognize that the process is not truly inclusive and figure out how to change it.

The work culture you create determines the kind of leaders you attract. Members want to feel like they are a part of something!

Our partnership with CCCS [aligned] with our vision of being the voice of real

estate in Howard County, and the partnership checked the boxes for both associations' strategic goals. CCCS wanted to offer first-time homebuyer education, and we thought, “Why not host them here? We could tap some of our volunteer leaders to lead sessions.” Aided by an in-person education reimbursement grant from NAR, the program gave our members an opportunity to identify future clients and helped us build our brand.

Q: How can AEs advance their career goals as they move up while nurturing and maintaining the connections they've made?

Coates: I make it a point to check in and connect with colleagues as much as possible. We designate time for Zoom calls and texts, and a lot of us talk through the AEI Year-Round Facebook group. We have ways of making time for one another.

Q: How can AEs forge supportive relationships with nearby REALTOR® associations when there is an element of competition in delivering services?

Coates: Playing nice in the sandbox is the key to development and growth! Through collaborations, you can create cool initiatives and professional camaraderie. One positive relationship we have is next door in Frederick County; its AE and I were chatting about how ethics cases have increased recently and came to the conclusion that we could support each other with those cases. No matter what the circumstances, positive and supportive relationships should be the goal. ■

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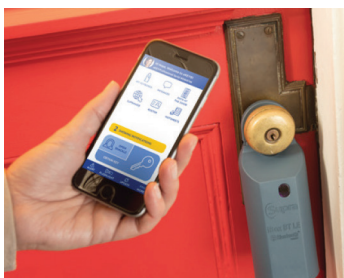
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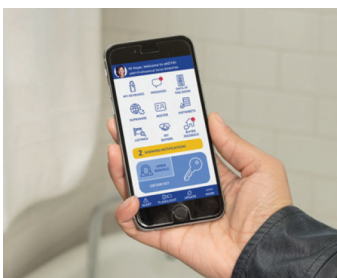
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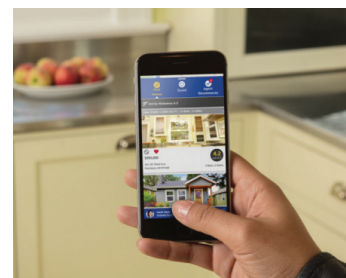
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