

SUMMER 2023

AEXPERIENCE

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Why Professional Designations Matter

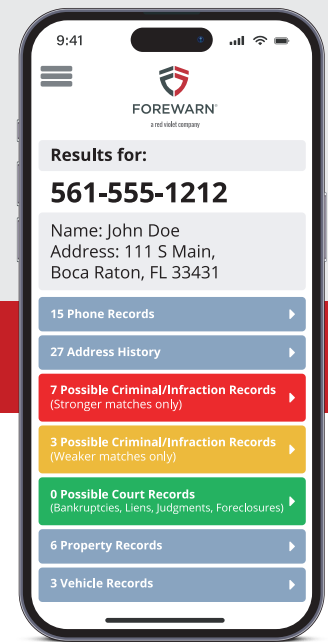
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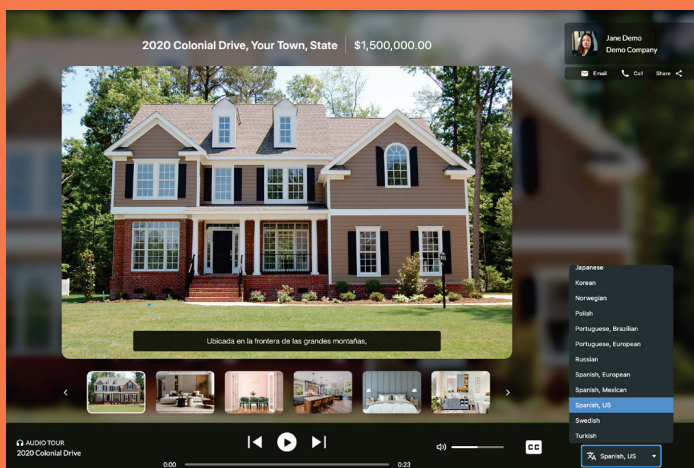




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AEXPERIENCE

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

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ON THE WEB

In May, the National Association of REALTORS® Board of Directors approved a new fair housing training requirement for members. Beginning in 2025, new members must complete two hours of training, and existing members must complete two hours every three years. Scan the QR code for a list of courses satisfying the new requirement.



NATIONAL ASSOCIATION OF REALTORS®
OFFICIAL PUBLICATION



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Permission to Dream

wouldn't be where I am in this season of success if, early in my career, my association hadn't invested in developing my skills, talents and abilities.

Of course, most professionals must possess the drive, the will and the ambition to elevate. But being open to learning new things and poised to jump at the right opportunity are key!

Professional development is essential in every industry. It gives an individual the opportunity to be better and become more efficient in their skill set. It also broadens their horizons.

It is important that association executives understand that professional development can be achieved and offered in many forms. The opportunities are abundant, from taking classes and attending relevant workshops and industry conferences to simply earning a certificate to expand your knowledge in a particular field.

In my experience, it was receiving my REALTOR® association Certified Executive designation, Professional Standards Administrator training, and the Certified International Property Specialist designation—all in a three-year time frame—that truly opened my eyes to a career in REALTOR® association management. Don't get me wrong; I enjoyed being a government affairs director in the exciting advocacy realm. However, until I was challenged to learn and



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

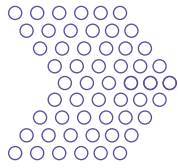
understand more about our industry and truly comprehend all facets of the association and how we serve our members, I never really saw myself leading as a CEO.

I was comfortable and very happy as a GAD, but you just don't know what you don't know. Sometimes your professional development will expand the limits that you unconsciously set for yourself! More knowledge in your field gives you permission to dream.

I am particularly excited about this AExperience edition highlighting professional development and how to become the consummate pro. I'm a firm believer that a successful AE will be a forever student. If you love what you do, you'll never be complacent, and you'll never lose your hunger to be greater and serve your staff and members better. I hope this edition inspires you to dream bigger, invest in your staff and challenge yourself from time to time.

AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS



BROWARD, PALM BEACHES & ST. LUCIE REALTORS®



MLS Collaboration Benefits Association Members

When it goes live later this year, one of the largest MLS data shares in the U.S. promises to help association members better collaborate and serve more than 50 million consumers.

The data share among Mid-Atlantic's Bright MLS, California Regional MLS and Southeast Florida's BeachesMLS will give subscribers access to current and historical listing data covering all three MLS footprints. This is expected to be especially important as migratory patterns continue to evolve post-pandemic.

"A large part of my role as CEO is to work with our leadership and industry counterparts by ushering in new ideas and partnerships that enhance our REALTORS®' ability to service consumers," says Dionna Hall, RCE, CEO of Broward, Palm Beaches & St. Lucie REALTORS® and BeachesMLS. "Our data share with Bright MLS and CRMLS

is a perfect fit for our members because we continue to see a massive influx of Mid-Atlantic and California consumer migration to South Florida. This partnership will bring direct value to our brokers and their clients."

Data shares with relevant markets are a valuable way for association executives to create new opportunities so members can thrive during all market conditions, Hall says. Shared data also gives association members channels to build relationships and referrals within the REALTOR® community.

The data share among Bright MLS, CRMLS and BeachesMLS is the latest in their several joint ventures. Another initiative, REdistribute, provides brokers with transparency on the distribution and consumption of their data. And Nestfully is a new consumer-facing listing portal.



"Without a doubt, we are going to see more collaborations in the future. The saying is 'real estate is local,' which is true; however, consumers want the ability to access properties on a more global scale, and AEs need to focus on providing their members the ability to meet consumer needs on a more national level as well."

—Dionna Hall, RCE, CEO of Broward, Palm Beaches & St. Lucie REALTORS® and BeachesMLS



'This Is Exactly What We Need'

That was the excited response from association executives when Dolly Matten, RCE, AE at Greater Lakes Association of REALTORS®, Minnesota, and



Dolly Matten



Breanne Gingerich

Breanne Gingerich, director of marketing for the National Association of REALTORS®, took the stage at the 2023 AE Institute to unveil NAR's reimagined Safety Toolkit for Associations.

The kit's goal: to help associations easily create or build on an existing safety program by offering ready-to-use resources that AEs can just plug and play—without the need to build something from scratch.

In July, NAR added the 30-Day Safety Month Plan for Associations to the toolkit to help associations plan for REALTOR® Safety Month in September. Last year the plan received more than 1,500 downloads.

nar.realtor/safety/AEtoolkit



"REALTORS® face a variety of risks every day, from meeting strangers in empty houses to handling sensitive client data. With this toolkit, our members have access to a comprehensive set of best practices, guidelines and resources that can make the difference between life and death and help them operate with confidence."

—Dolly Matten, RCE, Greater Lakes Association of REALTORS®



NEW MEMBERS

Onboarding Done Right

Done right, new-member onboarding can lead to more productive, loyal and engaged members.

But here's the challenge: New members can find the amount of information provided overwhelming, say association membership directors. At the same time, new members want that information available and easily accessible. Here are two approaches.

Brunswick County Association of REALTORS®, North Carolina. Shannon Jackson, director of membership and professional standards administrator, was charged with creating a new member drip campaign when she joined the association five years ago. "It took a few years to develop, as we wanted to research the best delivery methods and better understand what information was the most valuable to members," she says.

BCAR's campaign includes roughly 10 email communications, depending on membership type, sent out over 12 months and ending with a "Happy Anniversary!" email. "Dripping the pertinent information out to them over time eases them into the association while still providing them the information they need to best utilize their membership," she says.

The first five messages are sent in the first month of membership, when agents need the most help and support. Those messages include:

- A welcome email that includes bylaws and other rules and regulations, an orientation reminder, login information and other resources.
- A "meet the staff" video.
- Setup detail for BrokerBay, a showing management ecosystem.
- BCAR member-portal reminder.
- Member involvement committee invitation.

Greater Syracuse Association of REALTORS®, New York. Danielle Mizon, director of professional development and new membership onboarding and professional standards administrator, has taken an approach that focuses on ensuring easy access to resources. She makes materials and resources available both in hard copy form and online at cnyrealtor.com (search for New Member Resources). "I like having it all in one place so after we go over it on the call, new members can easily find it," Mizon says.

She starts her onboarding with a brief group call for new members. That's followed by training on the MLS, products and services, and rules and regulations within 30 days. New member orientation, including Code of Ethics and Fairhaven training, takes place within six months.

Whatever your approach, your onboarding needs to reinforce member value.

"With the implementation of [our new member onboarding] campaign, we have seen our member engagement and participation increase exponentially. We have also seen a drop in calls regarding the typical questions of 'Where can I find?' or 'How do I?'"

—Shannon Jackson, Brunswick County Association of REALTORS®, North Carolina

GOOD TO KNOW

The Media Is Calling

How will your members answer?

Say your association is launching a new housing program or lobbying for a rental policy that supports the rights of the property owner. One of your members gets a call from a reporter who's an acquaintance.

Will your member know what to do?

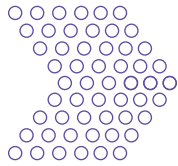
It's recommended guidance for all associations to educate their members and board members on how to handle media calls. The "Public Relations" chapter of The Answer Book—a National Association of REALTORS® publication that provides guidance on association governance—suggests:

Establish guidelines for handling media calls and educate members so that they follow them. Encourage members to refer calls to the association office. One of the biggest challenges facing many associations is controlling the flow of messages from the association to the media. When a reporter calls a REALTOR® directly for quotes or information, that REALTOR® might be anxious to help the reporter and to receive publicity, but in such a case, the member should simply refer the call to the local or state association.

"When I worked at the Santa Clara County Association of REALTORS® in California, if a member was asked to speak on behalf of the association, I always instructed them to reach out to me and our AE to let us know, and we would then figure out the best course of action," says Spencer High, now media communications manager for the National Association of REALTORS®. Usually, that means giving the interview opportunity to the president, or in some cases the AE, and coordinating a response.

AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS



Principles of Association Volunteer and Staff Leadership

Association volunteer and staff leaders think strategically and are visionary, seeing the big picture to advance the organization's mission and goals. Associations are guided by the "board governs and staff manages" principle, placing governance oversight in the hands of the Board of Directors and responsibility for personnel management and operations to the Association Executive. Each association defines the parameters of this principle based on their unique volunteer leadership engagement and staffing resources as guided by their strategic plan. In addition:

1. Association leaders rely on clear, open, and honest communication with other members of the leadership and staff team to foster and maintain strong and effective partnerships. They work closely, partner, support, collaborate and communicate effectively with each other to enhance opportunities for success.
2. Association leaders maintain professional and collegial relationships, taking care to avoid personal relationships with each other. They support and encourage an environment free from harassment.
3. As ambassadors for the association, leaders conduct themselves professionally and ethically in their business, on social media and at association events, and represent the association with respect and integrity.
4. Association leaders respect the positions within the organization and interact professionally with those in such positions. Personal relationships, opinions, and impressions are set aside while working together on behalf of the association.
5. Association leaders continually look to the strategic plan as a roadmap that guides the priorities and initiatives that are to be implemented. Leaders are adaptable to the challenges and obstacles that may arise during the year. Adjusting, pausing, or eliminating objectives may be required for the greater good of the association and the current environment.
6. Association leaders are knowledgeable about the governance of the organization and assist members in understanding how they can best contribute to the association.
7. Association leaders actively listen to their leadership partners, members, association staff and elected officials.
8. Association volunteer leaders receive orientation and training from the association staff, so they are effectively prepared to lead during their leadership term.
9. Association leaders continuously identify, recruit and mentor future leaders to ensure the association's sustainability.
10. All association leaders respect their fiduciary duties and respect confidentiality.



Do Your Volunteer Leaders and Staff Understand the Job?

This one-page can help.

Exceptional association leadership can be aspirational but should also be achievable. Developed by an NAR Association Executives Committee workgroup with input from AEs and volunteer leaders, the new "Principles of Association Volunteer and Staff Leadership" is a guide that staff and volunteer leaders at all levels can strive toward. The 10 principles—which are simple and direct—focus on communication, relationships, conduct, respect, strategic planning, governance, active listening, orientation and training, future leaders and fiduciary duties. Add them to your leadership orientation, training and planning opportunities.

nar.realtor/association-executives/10-leadership-principles

BEST PRACTICE

What Shouldn't Go on Social Media

For volunteer leaders, the need to maintain a professional demeanor, even outside of office hours, is also true on social media.

However, outside of outright offensive or inappropriate content, there can be a fine line when it comes to what one association is or isn't comfortable with its leaders posting. Here's guidance for creating a social media policy:

- Have one policy for paid staff and one for unpaid volunteers. Reason: Federal labor law protects some staff activities such as comments on working conditions or wages. State privacy may also apply. Work with legal counsel to determine what staff content is protected.
- Guidelines should be detailed and clear. For example, "Avoid making statements or posting photographs that could reasonably harm the association."
- Define what information your association considers confidential, sensitive, financial or proprietary—and spell out

to staff and volunteers that it should never be shared on social media.

If you have volunteer leaders who don't adhere to your guidelines, reach out and ask them to resolve the situation by withdrawing, correcting or revising their post, depending on the language of your social media policies. "The leader may not understand that the content could reflect poorly on the association and all REALTORS®," says Kate Moore, vice president of member experience at the National Association of REALTORS®. "Often, these types of difficult conversations can best be had member to member through an influential and respected member of your leadership team or past volunteer leaders."

But the best advice for anyone, adds Moore, is boiled down to five words: "If in doubt, don't post."

📄 See sample social media policies and other resources at nar.realtor/policies/social-media-policies.

51%

Percentage of NAR members surveyed last year who said their clients were at least somewhat interested in sustainability. Associations can help their members reach this growing client market by pointing them to educational resources and virtual green home tours through Home Performance Counts, a partnership of the National Association of REALTORS® and the National Association of Home Builders.

📄 homeperformancecounts.info



Affordable or Attainable?

When it comes to housing, words matter.

As associations continue to advocate for housing for all, association executives are weighing the words used to effectively convey that message.

Although “affordable housing” is a commonly used term, some argue that phrase can hold a stigma by implying subsidized housing.

“Attainable” can have the same challenge. “Attainable for whom?” asked Laurie Benner, associate vice president of housing and community development, National Fair Housing Alliance, during a discussion on The Hub (thehub.realtor). “Both are terms ... that tend to confuse people.”

In Texas, Amber Burton, director of governmental affairs and advocacy at the Houston Association of REALTORS®, says her association started a task force in 2019 to address the issue. “We flipped it to ‘housing affordability’ and saw a huge uptick in interest,” she said on The Hub discussion. That, added Kyle Kershner, federal political coordinator at Vermont Association of REALTORS®, is “a subtle but important differentiation and one that is easily understood by the public.”

HAR held a housing symposium for its members with experts from various industries discussing issues that impact the cost of housing and how all sectors of the real estate industry can work better together to support housing for all. “I’m happy to help share our blueprint if other associations are interested in having a similar event,” says Burton, who encourages members to email her at amber.burton@har.com. “Also, this event was funded by the NAR Housing Opportunity Grant.”

Christine Windle, RCE, director of community outreach at the National Association of REALTORS®, oversees the grant program and recommends that AEs focus less on terminology and more on a strategy and approach to solving local housing issues.

Here are some examples:

- **Columbus REALTORS® in Ohio** attracted more than 100 members and community partners when it hosted a Tiny Home Forum to explore the viability of these small dwellings as an affordable and energy-efficient alternative for buyers who might be priced out of the conventional market. A Housing Opportunity Grant from the REALTOR® Party helped make it possible—including an on-site tiny house for participants to tour.
- **Spokane Association of REALTORS® in Washington state** is working with city leaders to host a regional housing summit to bring stakeholders together and put recommendations into play following a Counselors of Real Estate report that defined action steps to increase Spokane’s housing inventory—one of the lowest in the nation. (*Read more on the association’s successful advocacy in Spokane in the summer issue of REALTOR® Magazine.*)
The final word on The Hub came from Ohio broker Rick DeLuca, AHWD, MRP: “There’s only a stigma to any word if we create the stigma. ... Use whatever word you want, but don’t forget to do what we are supposed to be doing: helping others with their housing choices, be it a home to buy or housing to rent.”



When members pay fines, how do associations put those funds to good use?



“Our fines go to the cost of our software and other expenses for our Professional Standards department.”

—Pamela Frestedt, RCE, chief operating officer, West and SouthEast REALTORS® of the Valley, Arizona



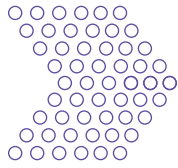
“Our fines go into our Education Fund and are used to bring in CE instructors from far and wide.”

—Kim Cox, GR, CEO, Ozark Gateway Association of REALTORS®, Missouri



“Fines go into the general fund. We really try not to rely on them as income because, ideally, we’d like to not fine our members.”

—Sarah Rayne, RCE, CAE, CEO, Howard County Association of REALTORS®, Maryland



AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS

Congratulations to New RCEs



David Sanders, RCE
River Counties Association of REALTORS®, Tenn.



Katie Barrow, RCE
Beaumont Board of REALTORS®, Texas



Jessica Lowe, RCE
Broward, Palm Beaches & St. Lucie Association of REALTORS®, Fla.



Derek Sprague, RCE
Bakersfield Association of REALTORS®, Calif.



Angela Brutsche, RCE, CAE
Texas Association of REALTORS®



Rickie McCabe, RCE
California Desert Association of REALTORS®



Terrie Suit, RCE, CAE
Virginia REALTORS®



Leslie Frazier, RCE
Virginia REALTORS®



Donna McCormick, RCE
National Association of REALTORS®



Josh Summers, RCE
Kentucky REALTORS®



Christy Guy, RCE
Mobile Area Association of REALTORS®, Ala.



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Naples Area Board of REALTORS®, Fla.



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Sponsorship Is a Win-Win

CALLING ALL RCE DESIGNEES: Give a leg up to an association executive who wants to follow in your footsteps by being a sponsor for an RCE applicant. "Sponsorship simply means offering a hand through the process," says Rachel Tristano, RCE, CAE, chair of the AEC-RCE Certification Advisory Board. "It's an exciting opportunity to 'pay it forward.'" RCE applicants who turn in their Applicant Data Form between now and Dec. 1, 2023, will be eligible for a drawing to win a \$100 Amazon gift card drawing. If the winning applicant has a sponsor listed on the ADF, the sponsor will also win a \$100 Amazon gift card.

GOOD NEWS!

REALTORS® ARE GOOD NEIGHBORS



Hundreds of REALTORS® and associations have been featured on **REALTORS® Are Good Neighbors social media channels**. Highlight your members who uplift the community through volunteer work.

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- Increases member engagement.
- Inspires members to get more involved.
- Attracts positive media attention to your association.
- Captivates social media scrollers through compelling stories.

Share your members' stories today!

nar.realtor/rgn



Follow us at   @RealtorsAreGoodNeighbors #RealtorsAreGoodNeighbors

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Why PROFESSIONAL DESIGNATIONS Matter

They're stepping stones on your journey to being
the consummate association professional.

By Eric Johnson

When Meighan Harris, RCE, joined Bonita Springs-Estero REALTORS® as education and events director in 2014, she had 15 years of experience in management and education in the dental field, but none with associations or the REALTOR® world. However, as someone identified by her soon-to-retire CEO as a potential replacement, she was immediately encouraged to work toward the REALTOR® association Certified Executive designation. This put her on a path of professional development, resulting in eight different designations or certifications.

Now CEO, she's working on number nine: Certified Association Executive.

Though the National Association of REALTORS® actively encourages professional development through industry-specific offerings like the RCE and applicable certifications outside the association like the CAE, everyone's professional development journey is going to be unique. The important thing, Harris and other association executives agree, is to be committed to the journey.

"I think if you're going to be in your industry, you need to be a part of it," she says. "I enjoy learning and bettering myself in my profession. I feel like if you're not constantly learning, you're going backward."

Separate Designations, Shared Objectives

RCE and CAE are the tentpole designations for AEs in the REALTOR® association world, and many choose to earn both.

The RCE is the only professional designation specifically for REALTOR® AEs, and it provides enhanced skills for association management through education, professional development activities and professional achievements within the REALTOR® world. The CAE credential is awarded by the American Society of Association Executives and is open to AEs in a variety of industries.

For Kevin Juliano, RCE, CAE, chief growth officer of the Pennsylvania Association of REALTORS®, one of the primary benefits of the RCE is its comprehensive look at all aspects of REALTOR® association functions. He understood early on that working at the state organization did not expose him to many of the issues faced by AEs in other associations.

"Learning about the MLS, professional standards, the Code of Ethics, arbitration and grievances—all the stuff that I don't do—has certainly given me a baseline knowledge and helped provide some context for other areas of the association," says Juliano, who oversees his association's membership, marketing and IT departments.

A local CEO's job can be quite varied. "I joke that one day I'm the plumber, the next I'm cleaning up the breakfast

from an educational meeting, and the next I'm working on a \$2 million budget," Harris says. "You really have to be a jack of all trades and a master of them, too, and I feel the competencies that are in the RCE body of knowledge give us a good outline of what our job entails, from doing RFPs to event management to growing global partnerships."

On the other hand, the broad perspective offered by the CAE provides an additional layer of understanding regarding general association operations and can help expand an AE's professional options.

"I have no intention of leaving the REALTOR® organization, but having that CAE credential and knowing that you can apply that skill set to a different association outside the REALTOR® world certainly opens up that opportunity," Juliano says. "The CAE has become recognized as the credential of the tried-and-true association executive."

And because the RCE acknowledges the value of the CAE, those with that credential enjoy an abbreviated RCE experience. "They

basically recognize that you've gotten your general association management practice out of the way, which allows you to focus on just REALTOR®-specific things when you take the RCE," Juliano says.

A Matter of Choice

While many choose to earn both designations, the order in which they're done can be a matter of personal preference as well as professional circumstances.

Because Harris was new to the world of REALTOR® associations, her decision to pursue the RCE first was sparked by her desire to quickly and thoroughly understand the specifics of her new profession.

"In doing the RCE, you learn all the designations, all the acronyms we use and all the intricate ways we work together with our three-way agreement with local, state and national associations," she says. "It was a way for me to take a deep dive into everything that would encompass a future role, and it helped set me apart from others in my field who may be hadn't taken the opportunity or been given the opportunity to get all that education."

Equally important for her was the foundational knowledge about running the association. "I came from a small-business background where there was a business owner and that's who you worked for," she says. "So, it was a complete 180 to having to know how to operate a board of directors and committees and budgets and all of that—and these components are built into the RCE."

Unlike Harris, who came from outside the industry, Juliano started out as his association's "social media guy" in 2013. Though he has earned both the RCE and the CAE, he chose to pursue the CAE first—and not just because it reduced the duration of the RCE.

"The CAE gets you to change the mindset of 'How would I do it?' to 'How would a professional in a similar-sized organization outside the REALTOR® world do it?'" he says. In many cases, he adds, those will be different processes.

Margy Grant, RCE, CAE, who's in her fifth year as CEO of Florida Realtors®, chose to earn her CAE early in her career, when she was associate general counsel at Massachusetts Association of REALTORS®.

"As a young attorney at the Massachusetts REALTORS®, my responsibilities quickly expanded beyond just legal counsel," she says. "I developed education curricula, worked with my executive committee on products, tools

and services, and then expanded into working on many programs associationwide. As my role expanded, I elected to pursue the CAE designation to further understand all aspects of nonprofit management."

Later, she earned her RCE, and though she encourages her peers to pursue both, she acknowledges that for some, the RCE can be a better starting point.

"Because the RCE is industry-related, it fine-tunes your understanding and expertise in all things involved in managing and working at a REALTOR® association," she says.

Expanded Benefits

Beyond the value of the knowledge itself, Juliano says pursuing the designations expands your tool chest of experiences and enhances your résumé. It's also a great way to build a network of professionals who have similar skill sets and encounter similar situations.

"That's one of the great things about continuing education," he says. "You start to interface with other like-minded individuals who have a growth mindset centered on staying on top of industry trends and changes."

He points to additional offerings the ASAE provides, along with the fact that both designations require recertification. That ensures designees continue to pursue educational opportunities.

Relevant professional development opportunities exist outside the two organizations as well. After earning her RCE, for example, Harris worked on her Institute for Organization Management certification from the U.S. Chamber of Commerce, which provides education in nonprofit management.

"I'm invested in my career, so I want to be part of all aspects of it and be aware of what's up and coming," she says.

The Importance of Support

Harris says she's grateful to her former CEO for not only encouraging her to seek the RCE but also providing the tools and financial support to undertake the designation. "I think you definitely need to have the backing of your board—or your boss, if you're staff and not the CEO," she says. "I was lucky that we had a staff training budget that allowed me the opportunity."


Not only are both designations costly, but they require a significant investment in time as well. Harris' predecessor encouraged her to time-block her schedule so she could whittle

Six Steps Toward Your RCE



Earning the RCE designation is a journey that will carry with you throughout your REALTOR® association career. Here's the path to getting started:

1. Review the RCE website.
2. Start the RCE Applicant Data Form.
3. Complete one of two required self-study courses: the REALTOR® Association Management Self-Study Course (free) or the Advanced REALTOR® Association Management Online Self-Study Course (\$150).
4. Print or purchase *The Answer Book*.
5. Gather other available online references.
6. Prepare for the exam by reviewing the AE Competencies and RCE Body of Knowledge.

 Start your journey at nar.realtor/RCE.

away at her RCE. “I kept a spreadsheet that showed what I needed, what I was doing to get it and where I was in relation to those goals,” she says. “Because you can get creative.”

The RCE operates on a point system, and applicants use the Applicant Data Form to track them. Because points can be accumulated in different ways, Harris devised a plan with the help of her CEO that allowed her to work as efficiently as possible. “I think it’s definitely good to have partnerships that can help you get what you need done,” she says. “If you don’t have that support, then it’s either going to be something you do at your own expense or there are going to be opportunities you’re just not going to be able to pursue.”

Juliano received similar support. “I was fortunate that my association does invest in professional development for staff,” he says. “This was one of those options that I was able to utilize as a

human resource benefit: They would support me financially and allow me to carve time out of my workweek to study. If you’re going to take the extra step of education, our association is going to support you with that.”

Returning the Favor

Grant recognizes the value of her designations and is keen to support those in her association who wish to further their careers by going after them.

“I encourage all my employees who are managers to pursue their RCE,” she says. “Even if a staff professional does not pursue the full designation, we want our teams to always learn and grow.”

Mentorship can help. Harris says she has peers and colleagues who come to her for advice on their point strategy. It also helps to know what scholarship programs are available. She encouraged one of her employees to apply for a Florida Realtors® scholarship so he’d be able to

attend a state AE workshop that counted toward his RCE points. “It helped to stretch the funds in my budget and take him somewhere else as well, kind of paying forward what my predecessor did for me,” she says.

NAR also offers the Judith Lindenau RCE Scholarship, which covers the application and certification fee.

Making the Investment

Professional development is a key investment in yourself, and one that can have a positive impact on our association.

“I would encourage anybody to speak with their supervisor or their board to see what offerings exist—or could exist—within the association,” Juliano says.

Harris agrees. “Don’t leave opportunities on the table,” she says. “And don’t wait—start working on it now.” ●

Eric Johnson is a writer living in Wisconsin.

C2EX Celebrates Five Years

If the RCE designation signifies a REALTOR® association executive’s dedication to professionalism, completing the REALTORS® Commitment to Excellence program, or C2EX, does the same for members of the National Association of REALTORS®.

Celebrating its fifth anniversary, the National Association of REALTORS® C2EX program is not a designation or certification—it’s an endorsement from NAR, giving REALTORS® an opportunity to evaluate, enhance and showcase their commitment to professional behavior and development.

The voluntary member program is open to participants at all levels of the REALTOR® organization. Participants complete a series of assessments and actions that lead to earning Excellence Badges. Once a participant achieves excellence in all the competencies,

a C2EX Endorsement is awarded, and the renewal cycle occurs every three years.

While C2EX does not qualify for continuing education credits through state licensing bodies, the program is helpful to members in other ways. The endorsement provides 10 credits toward RCE education requirements and fulfills NAR’s Code of Ethics requirement.

Many AEs—like Jill Beck, CEO of the North Dakota Association of REALTORS®—have earned the endorsement and encourage their members to do so, too. Beck is a three-time C2EX Association Challenge winner. That means she has achieved member participation numbers that reflect her personal enthusiasm for the project. “Our brokers really try to encourage their agents to take the program, and we strongly

encourage our local board association executives and staff to take it as well,” she says.

According to Beck, C2EX has helped her in committee meetings and board meetings by providing a general understanding of what professionalism should look like across all levels of the association.

“Some modules may help association executives more than REALTORS® and vice versa, but to get the endorsement, you have to take all the modules, so it helps everyone understand what everyone else does,” she says.

More than 140,000 members are participating in the program.

“We feel our members need it and recognize that it’s a good thing,” Beck says. “I strongly encourage everybody to take it, whether you are staff or a member. We can all use growth in our industry.”



COOL

As associations redesign their offices, their most important aesthetic is welcoming members and meeting their needs.

BY THOMAS A. BARSTOW



SPACES

With more than 10 acres “brimming with wetlands and wildlife,” the new MetroTex Association of REALTORS® headquarters is someplace special, says Janet Kane, RCE, CAE, CEO of the association based in Irving, Texas.

Completed in 2022, the 39,627-square-foot building was designed to be a “home away from home” for more than 38 staff members and roughly 26,000 association members who use it for in-person classes, events and numerous other day-to-day services, Kane says.

MetroTex is just one of several real estate associations nationwide that have recently built or refurbished their buildings—or that are in the process of doing so—with an eye toward offering staff members inspirational and comfortable spaces to work, while providing association members with the tools and professional development opportunities they need to expand their businesses.

Planning Ahead

The building committee of the Greater Louisville Association of REALTORS® in Kentucky started by using geotargeting to map the residences of each of its 5,000 members at the time, as well as the location of the 20 largest real estate firms in the market, says CEO Lynda Fernandez, RCE. Geotargeting allowed the leadership to focus the property search.

“It became evident that a larger training facility was needed,” Fernandez says. “Parking at the previous facility had become a challenge, and, regardless of mitigation efforts, flooding in the finished basement, which housed essential staff office space and our computer training room, continued to be an issue.”

The new space, which opened in July 2021, was built with future growth in mind and was designed to address the addition of post-licensure education requirements and mandatory training in the Code of Ethics. “Our new state-of-the-art building features ample parking for members; 15,000 square feet of new, modern spaces to hold larger classes and events; increased rental space for member firms; the latest technology and so much more,” Fernandez says. “It allows us to enhance our member services and experience, so GLAR members can thrive in their real

estate business and better serve their clients.”

In Ohio, rather than move, leaders at Dayton REALTORS®

decided to renovate the association’s 1980s-era building. “We’ve got a great location, and there are not many places that you’ll find a building of our size—we’re about 17,000 square feet—that really fits the needs of our membership in Dayton,” says Carlton Jackson, RCE, CEO. “The property also has about 100 parking spaces in Dayton proper, which is an amenity that is hard to come by.”

The association created a building committee that included commercial real estate agents. It also hired an outside consulting company to look at the mechanical systems and assess the space requirements for a staff of 14 serving about 3,500 members.

The long planning process, which will culminate with a reopening later this summer, included putting together a financing plan for the \$3.5 million project and finding the right contractor.

“In terms of the lessons learned from all of this, take your time and hire a consultant to come in and look at everything,” Jackson says. “We want a building that’s going to be usable and meet the needs of our members for the next 40 years, just like this building did for the first 40.”

Kane agrees that the most important aspect of any building project is starting with the right team: the association building task force, project manager, architect and contractor “in that order,” she says. “Your association building task force should be a small group of volunteers and key staff, willing to be available throughout the duration of the project. Volunteers should be selected on the basis of expertise—commercial experience, design experience, etc. Key staff may include the CEO, your head of finance and any other individual you think would be important to the success.”

The project manager will be a partner in coordinating among the contractor, the architect and the association and should seek out the expertise and knowledge of the best players in each realm, she adds.



MetroTex Association of REALTORS® designed its new building as a home away from home for members and staff.

METROTEX ASSOCIATION OF REALTORS®



At GLAR, member benefits include a backdrop for photos and events.

GREATER LOUISVILLE ASSOCIATION OF REALTORS®



Dayton REALTORS® is renovating its 1980s-era building.

DAYTON REALTORS®



CHICAGO ASSOCIATION OF REALTORS®

Views of Michigan Avenue are the backdrop to the Chicago Association of REALTORS® office and classrooms, designed by members.

In planning its space, the Chicago Association of REALTORS® involved members from all around the city during a three-year process that culminated in a move in late 2016. The association occupies the eighth floor of the National Association of REALTORS® building in Chicago.

“We had many committees involved, but we wanted the members to sign off on it,” says Jay Turner, CAR facilities and operations manager. “This is their headquarters, so we want them to love the space. We had great involvement, and that is something that I cannot stress enough. Get your membership involved because their opinions are what matter.”

Amenities and Unique Features

At MetroTex Association of REALTORS®, major event and training spaces were planned on the first level, in addition to private onboarding offices for new members to meet with staff. “The first level also boasts three large training rooms, a member lounge, a large outside patio, a green room for video shoots, a private room for instructors or guests, lots of natural lighting and up-to-date, convenient technology,” says Kane.

The second level of the association houses administrative space, an outdoor viewing patio, and a staff break room with a private patio. “When a day is particularly challenging, [members and staff] can take sanctuary in the wellness room, which was created as an oasis to gather one’s thoughts and take a breath, or it can provide privacy for new mothers,” Kane says. “One of our core values at MetroTex is the volunteer-staff partnership. With that, our leadership was more than generous in providing beautiful, comfortable spaces for both association members and staff members to enjoy. We realize that often the majority of

our daily lives are spent at work, so it was important that work was a place they want to be.”

The renovation project in Dayton includes turning unused space in the basement into a recording studio and green room where members will be able

to produce videos and podcasts, Jackson says. The basement will have the feel of a collaborative lounge, with whiteboards on the walls, a television and comfortable furniture.

In designing the staff workspace in Chicago, the decision was made to put in technology that creates white noise to cut down on the clamor that can come from multiple people working the phones, Turner says. When the idea was first brought up, he was skeptical, but “I can tell you that it is great,” he says. “When you turn it on, it definitely dampens the sound.”

The Chicago association has a member lounge that includes restaurant-style booth seating as well as conference rooms. When members are at the association, they can use the space as an office to meet with vendors, appraisers or clients.

“In our old office, we didn’t have that space for members to come in,” Turner says. “We wanted them to have a place where they could hang out and have a nice place to work.”

Seven years into the move, Turner and CAR Chief Operating Officer Zack Wahlquist, CAE, are now rethinking the space, with a goal to encourage collaboration among the 45 staff members and continue to offer association members a welcoming environment. Over the years, but especially during the COVID-19 pandemic, the Chicago office adopted virtual tools that allow members to easily manage association business, such as paying dues, and to attend virtual classes. Those efforts have led to lower foot traffic, Wahlquist says.

However, members’ enthusiasm for in-person meetings is on the rise, he adds. “When we’re doing things in person, we have a much higher percentage attendance at those meetings.”

Why Choose Sustainability

When associations remodel or rebuild, sustainability is an important consideration. AEs say the priority is to support a healthy environment while reducing operating costs, which makes more money available for member services.

The MetroTex building has 100% LED lighting to reduce energy consumption. Its HVAC system also has variable refrigerant flow, which dramatically reduces energy consumption compared to a typical commercial building, says Grant Tedford, project director. Tedford adds that the VRF system is rare for projects in the U.S., with the technology mainly seen in Asia.

“The building structure was made of recycled iron,” Kane says about the MetroTex project. “We worked to construct the building while having as little impact as possible on the wildlife and wetlands on the property—home to a family of coyotes, bobcats, hawks, rabbits and more. We upgraded our internal HVAC systems to include an ionization air filtration system to ensure the health of our members and staff, and our drinking fountains include a water bottle refilling station.”

In Louisville, leaders decided to install a generator that allows most of the building to function in case power goes out, Fernandez says.

Member Needs Come First

Decisions about how to use association space all come down to making sure that the needs of members are met, Jackson says.

“REALTOR® associations in general are member-centric organizations,” he says. “I would like to have our office have a Starbucks or Apple Store kind of feel. We will have workstations set up where members can pop in if they need a place to plug in and get a little bit of work done. I want a place that’s inviting to our members. At the end of the day, it’s their building, their house.”

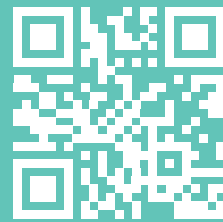
“Dreaming of a new building and bringing it to fruition is one of the most demanding, exhausting, exciting and rewarding experiences ever,” Kane adds. “It’s a gift of love you provide to your association members for years to come.” ●

Thomas A. Barstow is a writer and editor based in York, Pennsylvania.

NAR RECOGNIZES FAIR HOUSING CHAMPIONS

Sponsored by realtor.com, the National Association of REALTORS® Fair Housing Champion Award honors REALTORS® who have gone above and beyond to advance fair housing and expand homeownership in all communities.

Beginning **September 1st**, you can submit your nomination(s), or encourage members to nominate themselves or others.



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SOLUTIONS FOR THE HOUSING CRISIS



With the help of NAR resources, REALTOR® associations across the U.S. are rallying support to keep housing affordable and available for all.

BY M. DIANE McCORMICK



W

ith rent control proposals popping up around the country and property-rights restrictions making it difficult to fill the demand for homes, REALTOR® associations are mobilizing their members and winning allies for proactive solutions to America's housing crisis.

In the past year, they have defeated a burdensome real estate transfer tax, halted restrictive zoning, developed free fair housing educational tools and, in Florida, won a statewide rent-control ban balanced with common-sense housing solutions.

These REALTOR® associations designed effective, targeted campaigns by augmenting their own government affairs and communications expertise with customized National Association of REALTORS® resources. By rallying members, community allies and partners, they are positioning REALTORS® as champions of thriving communities, providing access to affordable homes for everyone.

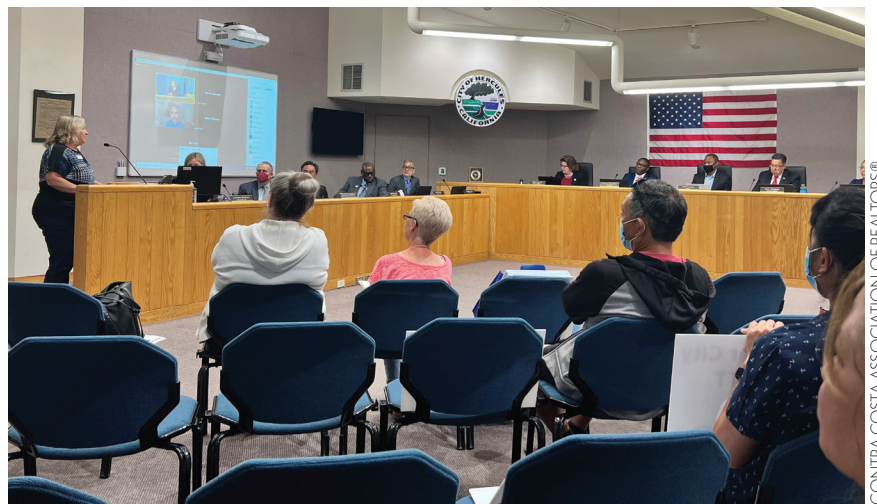
Contra Costa Association of REALTORS® Fighting a Real Estate Transfer Tax

In California's famously unaffordable Bay Area, officials in the small city of Hercules proposed a real estate transfer tax to refill public coffers drained by the COVID-19 pandemic. Leadership from the Contra Costa Association of REALTORS® helped defeat the levy on buyers and sellers while successfully advocating for adoption of a more equitable solution.

With help from the REALTOR® Party's Advocacy Everywhere services, CCAR honed its messaging. Transfer taxes add to the cost of home sales, and the burden falls on a select group of homebuyers and sellers, CCAR argued. The funds, which rise and fall with the real estate market, also don't supply steady revenue.

"No one gets the money back," says Heather Schiffman, RCE, CCAR government affairs director. "It's not a tax write-off. It doesn't get refunded to them in any aspect, and in California, in the Bay Area, nothing's cheap."

Meanwhile, city polling revealed that Hercules residents supported the more equitable approach of raising the user utility tax they were already paying for communications, electric and gas services. Raising an existing tax—one paid by and benefiting all residents—was an easier ask than launching a new tax, CCAR argued.



CONTRA COSTA ASSOCIATION OF REALTORS®

Advocacy Everywhere also provided messaging suitable for social media and direct contacts to mobilize real estate agents in Hercules and a neighboring municipality.

On the night of the city council vote, real estate agents and constituents filled the audience, holding small signs saying, "No Real Estate Transfer Tax. Yes on User Utility." Impressed by the turnout, a wavering city council member cast an opposing vote, and the proposal failed, 3–2. Later, an overwhelming 70% of Hercules residents approved a user utility tax hike.

"For those who have been dreaming of purchasing that home, we've kept that ability for them to do it by not adding additional taxes or burdens," says Schiffman. "Keeping housing as affordable as possible, even though it is the state of California, is still better than completely pushing people with limited means out of the market."

Florida Realtors® Opposing Rent Control Statewide

In Florida's Orange County in 2022, officials rejected the advice of their own consultants and put a rent-control measure on the ballot. Florida Realtors® led opposition to the measure, which passed at the ballot box but was ultimately blocked by state courts.

In warding off the possibility of similar measures in other regions, Florida Realtors® led the successful effort to ban rent-control policies statewide while incentivizing affordable housing and zoning relief.

For Florida Realtors®, the key to success was "unity within the membership to prohibit these harmful policies in the state," says CEO Margy Grant, RCE, CAE. "This unity was achieved by involving members in the process early on and educating them on the damaging effects of rent control."

A strong partnership with the Florida Apartment Association also provided momentum. The partnership helped share costs and gave Florida Realtors® "a stronger story to tell when speaking with lawmakers on the matter."

Debi Mackey, 2022 CCAR president, speaks at a Hercules City Council meeting during discussion of a proposed real estate transfer tax.

A RECENT STUDY FOUND THAT **RENT CONTROL** WOULD HAVE THE FOLLOWING **NEGATIVE IMPACTS**

THE STUDY EXAMINED IMPACTS ON MULTIFAMILY HOUSING FOR JACKSONVILLE, MIAMI, NAPLES, ORLANDO, & TAMPA

HOUSING OPPORTUNITIES LOST

16,564
FEWER APARTMENTS IN THE CONSTRUCTION PIPELINE

\$4.4 BILLION
LESS IN NEW CONSTRUCTION



ECONOMIC LOSSES

80,296 FEWER NEW JOBS

\$4.2 BILLION POTENTIAL WAGES LOST

\$10.4 BILLION POTENTIAL ECONOMIC LOSS

POTENTIAL TAX REVENUE LOST

LOST LOCAL TAX REVENUE
\$294.3 MILLION

LOST STATE TAX REVENUE
\$178.9 MILLION

TOTAL LOST LOCAL & STATE TAX REVENUE
\$473.3 MILLION

© FLORIDA REALTORS®

REALTORS® in Florida used facts to defeat a rent-control ballot measure in central Florida and beyond.

Issues Mobilization funding from NAR provided crucial support along two key avenues. The funds financed the voter campaign strategy that helped defeat the referendum and kick-started the effort to achieve a statewide ban. They also enabled a study examining the potential harm of rent-control policies in regions throughout Florida. Commissioned in mid-2022, results arrived just in time for lawmakers convening for the 2023 legislative session.

“You could almost see the shock on some of their faces as we walked them through the economic loss that could occur, including the decline in available affordable housing, lost jobs and the decline of the local GDP,” says Grant.

Throughout the campaign, Florida Realtors® leveraged its most powerful message: that rent control actually decreases the long-term availability of affordable housing inventory as it chases away developers who can’t recoup their investments.

Gov. Ron DeSantis signed the resulting Live Local Act into law on March 29 this year. While prohibiting rent controls, the law provides record levels of funding for housing solutions, expands the Hometown Heroes Housing Program for frontline workers, offers tax incentives and credits for private investment in affordable rental housing, and eases local restrictions on construction of affordable housing.

Add Muscle with NAR Resources

The National Association of REALTORS® public affairs arm, the REALTOR® Party, offers resources that empower REALTOR® associations to maximize their own resources as they implement campaigns, conduct community outreach, and mobilize members and consumers. In their fights to oppose restrictions and advance housing solutions, REALTOR® associations leveraged these key REALTOR® Party resources:

- **Land Use Initiative:** Sophisticated, real-time analysis of proposed land-use measures, plus talking points on their impact.
- **Advocacy Everywhere:** All the technology tools needed to issue calls for action, with precision targeting of key audiences.
- **Issues Mobilization:** Grants that help associations defray the costs of campaigns for or against public policy proposals. Available consultation helps associations develop those strategies.

NAR and its REALTOR® Party resources are indispensable assets, says Heather Schiffman, RCE, Contra Costa Association of REALTORS® government affairs director.

“They are with you from the beginning to the end,” she says. “I cannot speak more highly of them. It’s a fantastic program, and if there’s someone out there who hasn’t utilized it yet, they should—100%.”

NAR is also a founding member of the new Housing Solutions Coalition, created to push back against rent control. NAR joined the partnership with the Mortgage Bankers Association, National Apartment Association, National Association of Home Builders and National Multifamily Housing Council.

In coordination with the partners’ local and state members, the coalition will offer resources for campaigns opposing rent-control proposals and presenting proven, effective alternatives. Learn more at housingsolutionscoalition.org.

Florida Realtors® will remain involved in educating clients and business associates on the Live Local Act’s benefits, says Grant. Prohibiting rent control, she adds, “is pro-affordable housing.”

“Rent control decreases the supply of available affordable housing, and it diminishes the effectiveness of these programs,” she adds. “By opposing rent control, REALTORS® are helping proven affordable housing policies succeed. We should not conclude that these two issues are exclusive of the other.”

Long Island Board of REALTORS®

Raising Public Awareness of Fair Housing

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Tessa Hultz (second from right) poses with panelists Bill Dedman, Pulitzer Prize-winning investigative reporter; Bryan Greene, NAR vice president of policy advocacy; and Alexia Smokler, NAR director of fair housing policy and programs, who spoke during “Widening the Lens: A Fair Housing Conversation.”

In 2019, New York state outlawed housing discrimination based on source of income—including vouchers, unemployment, child support, GI Bill funds and more. A few months later, *Newsday’s* scorching exposé of modern redlining and discriminatory lending in the Long Island housing market turned the spotlight on residential steering. However, that story didn’t divert LIBOR from starting its Home for All of Us fair housing campaign in 2022 with a focus on source of income.

“Source of income became our first campaign because we know that it did not get the attention it needs,” says Tessa Hultz, RCE, CAE, the former CEO of LIBOR.

Home for All of Us raises awareness about fair housing while zeroing in on specific issues. For 2023, LIBOR will add discrimination based on disability as a campaign focus.

Intended targets include nonmember real estate licensees in LIBOR territory, because “if they’re going to practice in our market, it’s better to teach them,” Hultz said in May.

Home sellers and buyers are also targeted, she added, because “the public is absolutely just as liable to abide by fair housing laws but has no educational requirements, no licensing requirements.”

LIBOR’s fair housing team—including staff from government affairs, communications, legal and social media—developed the messaging. On the Home for All of Us website (homeforallofus.org), state-agnostic one-page flyers outline the protected classes in housing sales and rentals, plus potential penalties for fair housing violations.

With their small-print reference to LIBOR, the flyers are meant to be co-branded. “Take it, steal it, use it,” says Hultz, who suggests that real estate agencies make it office policy to include the flyer in every listing packet “so you know every single seller working with your agents has been faced with this document telling them what their obligations are.”

The pandemic-era eviction moratorium gave LIBOR a chance to change the dialogue around source of income, as many landlords collecting reliable income were those with housing-voucher tenants. Working with partners in fair housing organizations, LIBOR refined a list of the benefits of accepting voucher clients.

Partnering organizations may have different missions, but all share an end goal and, as a result, enjoy working together, says Hultz. A rise in source of income violation complaints underscores the need for education on conveying property on a nondiscriminatory basis.

“We need to teach everybody, and that means the public,” she says. “That means the property managers, that means the nonmembers and that means the members—because this is the law, and people are getting it wrong.”

East Tennessee REALTORS®

Winning Against Restrictive Rezoning

Before Blount County, Tenn., commissioners voted on a restrictive rezoning proposal, East Tennessee REALTORS® was told not to bother showing up because the “yes” vote was locked in. “Lo and behold, it failed on a 10–10 vote,” says Government Affairs and Policy Director Hancen Sale. “It was a surprise and a huge win for the real estate industry and home ownership and housing.”

In fast-growing, inventory-scarce Blount County, rezoning proposals to increase minimum lot sizes and eliminate unit and cluster development threatened to reduce housing density by 75%. The proposal also could have damaged the property rights of farm owners.

ETR “cross-pollinated” NAR resources to develop messaging and build a show of opposition, Sale says. Submitting the proposal and ETR’s own research to the NAR Land Use Initiative yielded detailed analysis into the proposal’s impact, helped shape talking points and led to the campaign slogan, “Blount County Has a Lot to Lose: Keep Housing Affordable.”

Inspired by NAR’s *Double Trouble* affordability report, ETR put a human face on household income numbers by comparing the county’s 300 home listings with job postings and salaries for essential but scarce workers such as new teachers and sheriffs’ deputies. The question became, “Can the people who keep your community safe afford to live here?”

Social media and online advertising raised public awareness among residents, who were encouraged to contact their elected officials through a website created for the campaign.

Members received numerous emails and texts through the REALTOR® Party’s Mobile Alerts program, and they spoke at public hearings.

“I like to say we utilized nearly every potential resource available from NAR,” says Sale. “We were able to pack a county courthouse meeting room with dozens of REALTORS® wearing REALTOR® blue in support of the cause.”

The campaign deepened ETR’s relationships with elected officials and community organizations, and all are now collaborating on “common-ground solutions” that keep the community desirable while promoting affordable housing.

“We’re staying engaged,” says Sale. “We recognize that it’s not something that’s over and done with.” ●

M. Diane McCormick is a Pennsylvania-based writer.



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Antitrust for Associations

Antitrust compliance isn't just for the members; associations play a role, too.

BY DEANNE RYMAROWICZ



Local and state REALTOR® associations must ensure that their leaders and members understand antitrust laws and the importance of compliance. Antitrust laws promote fair competition and prevent anti-competitive behavior, which can harm consumers and competitors. Violating antitrust laws can result in treble damages, hefty fines and legal penalties, not to mention damage to the association's reputation.

Associations must be mindful of antitrust compliance in all their activities, including board of choice practices, association meetings, professional standards hearings and decisions, operating or participating in an MLS, and mergers with other associations.

Three significant antitrust issues associations must avoid are price fixing, group boycotts and market allocation. It's important to remember that associations are competitors and act accordingly. This means associations must make decisions unilaterally and independently and should never confer or agree about the dues and fees they charge for membership and other services. Associations must avoid collectively agreeing to boycott or blacklist a particular competitor, supplier or customer. There also cannot be an agreement to allocate among themselves the exclusive right to recruit or accept members in specific

geographic areas, to recruit or accept particular members, or to offer particular products or services. Therefore, it's imperative to set expectations and make the association's commitment to compliance with antitrust laws clear, and to take measures to immediately stop any meeting, discussion or other efforts to engage in any of the above activities.

Failure to take appropriate actions can result in liability. The U.S. Supreme Court held that a trade association will be liable under antitrust laws for the actions of its volunteers acting with apparent authority of the association, even where those actions are contrary to the association's established rules and policies. Therefore, associations must establish and enforce best practices to avoid antitrust liability. These best practices should include:

- **Providing annual training.** Associations should provide annual antitrust compliance training to staff, officers, directors and other volunteer leaders on how to spot—and respond to—potential issues. The pocket guide, “Antitrust and Real Estate Compliance Guide for Association and Board Leadership,” is a great starting point.
- **Crafting clear policies.** Have clear policies and guidelines in place that explicitly prohibit antitrust violations and provide

guidance on appropriate conduct. Review the antitrust policy at the beginning of meetings and include a copy in meeting materials. In addition, REALTOR® association-owned or -operated MLSs must adopt and enforce the MLS Antitrust Compliance Policy.

- **Practicing prevention.** Empower association leaders and staff to stop any potential antitrust discussions at meetings and events. Monitor the association's social media pages; remove comments and discussions that are inconsistent with the association's antitrust policy.
- **Maintaining records.** Set and follow an agenda for all meetings and take accurate and clear minutes to avoid misinterpretation. Consider having legal counsel review the minutes, particularly where legally sensitive matters are discussed.
- **Asking counsel.** Any proposed association activity that may impact competition should be reviewed by legal counsel to ensure compliance with antitrust laws.
- **Encouraging reporting.** Members should be encouraged to report any antitrust violations or concerns to association leadership or legal counsel. The National Association of REALTORS® Insurance Program provides

associations with coverage for antitrust claims, limited to defense costs only, up to \$1 million per claim. Note that the claim limit is shared by all covered associations and MLSs named in a particular—or related—claim. For an added layer of protection, associations should consider purchasing excess coverage, which provides the option to purchase additional coverage of up to \$1 million per claim each year.

Associations must be aware of antitrust laws and take proactive steps to

avoid liability and ensure that the legitimate affairs of the association are not subject to misinterpretation. For association executives and others interested in learning more about how antitrust laws affect associations, NAR has a webinar as well as other important resources dedicated to the topic. ●



Deanne Rymarowicz is associate counsel, legal affairs, at the National Association of REALTORS®.



GOOD TO KNOW

Important Links

Antitrust and Real Estate Compliance Guide for Association and Board Leadership:

store.realtor.com/antitrust-and-real-estate-compliance-guide-for-association-and-board-leadership-download

Sample antitrust policy (member only):

nar.realtor.com/ae/sample-antitrust-policy

MLS Antitrust Compliance Policy:

nar.realtor.com/mls-antitrust-compliance-policy

Antitrust for Real Estate Professionals (video): nar.realtor.com/videos/antitrust-for-real-estate-professionals

Antitrust for Associations (webinar): nar.realtor.com/videos/risk-management-webinar-series/antitrust-for-associations



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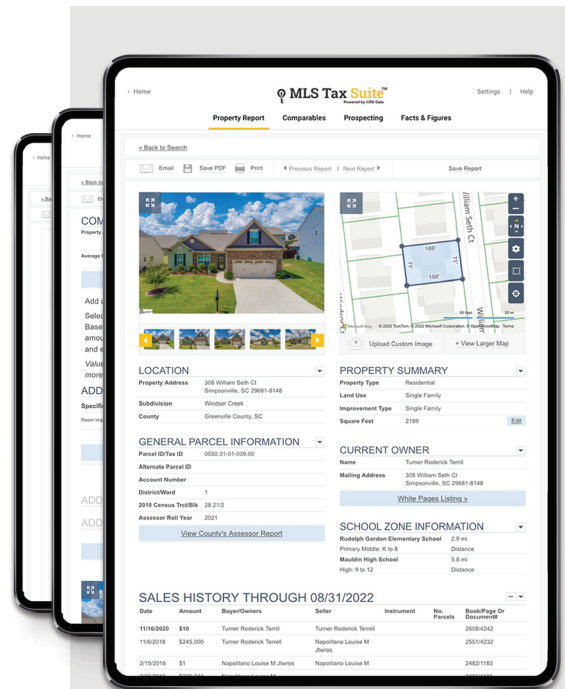


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At the Core

Whether you're new to the Core Standards or not, here's what to know for 2023. **BY DANIEL DOEPKE**



The year 2023 marks the ninth cycle of the Core Standards. Rolled out in 2014, the Core Standards for local and state REALTOR® associations promote strategic alignment among all entities of the REALTOR® organization and ensure high-quality service for all members.

If you've logged into the form already this year, you likely noticed that there are no changes to the Core Standards for 2023. For those of you who might be new to the Core Standards process, here are a few helpful tips to remember:

- 1 Get an early start on your audit, review or compilation.**
Audits and reviews can take a fair amount of time to finish, and you don't want to be cutting it close to the Core Standards deadline if your accounting firm has any sort of delay. Also, remember that a compilation will suffice only for associations with gross revenue of less than \$50,000.
- 2 Be aware of your state's Core Standards deadline.**
While the National Association of REALTORS® deadline is Dec. 31 each year, your state association may impose an earlier deadline to give it time to review all submissions.
- 3 One activity generally cannot count for multiple Core Standards.**
Activities can count toward only one Core Standard at a time, with one notable exception: Promoting or conducting a diversity, equity and inclusion activity or a fair housing activity that falls within the Unification Efforts category may also count toward compliance in either the Advocacy or Consumer Outreach category, though not both.
- 4 It is noted on the form if any proof of an activity is required to satisfy a Core Standard.**
Local AEs need to be aware that state associations may request additional information about any Core Standard prior to approval.

While the Core Standards themselves have not changed very much over the course of nine cycles, NAR is commit-



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ted to soliciting feedback and improving the process for our association staff and leadership. To that end, a work group of the Association Executives Committee—the Reimagine Core Standards Work Group—was formed this year to examine each part of the Core Standards process. The work group sent surveys out to association staff across the nation during the early part of the year, and it is currently gathering data to help guide the path forward for Core Standards in the future. The group hopes to finish its report to the committee before the end of 2023, and members are grateful for the input they have received thus far.

Regularly revisiting the purpose and goals of the Core Standards is an important part of making sure the process remains useful to members and associations without becoming an overwhelming burden for association staff.



Daniel Doepke is director of member policy at the National Association of REALTORS®.



Need Help?

NAR offers these resources to help association staff and leadership with the annual Core Standards process.

THE INTRODUCTION TO CORE STANDARDS COURSE

nar.realtor/ae/introduction-to-core-standards

CHECKLISTS, RESOURCES AND TOOLKITS

nar.realtor/ae/manage-your-association/core-standards-for-state-and-local-associations/core-standards-resources-criteria

FREQUENTLY ASKED QUESTIONS

nar.realtor/ae/core-standards-faqs

If you have any questions about the Core Standards or the Reimagine Core Standards Work Group, please contact NAR at narpolicyquestions@nar.realtor, or by phone on the policy inbound line, 312-329-8399.

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No Downside to Upskilling

All employees can benefit from a tune-up now and then. **BY CAROLE KAPTUR**

Years ago, I was the sole trainer for a local county government. It was an interesting position because I was expected to design and deliver training programs and to have expertise on just about any topic. In fact, to save costs for one of the departments that had a mandatory training requirement, I was once asked to design a course on auto maintenance. Let me tell you, as someone who will likely deflate a tire while trying to figure out air pressure, I should not have anything to do with training on auto maintenance.

The most challenging situation I faced was when employees said they didn't need any training because they were at the top of their game. As I was given to understand, these employees had reached a stage of professional perfection. They had no need for any additional development in their communication, conflict resolution, teamwork or any other soft skills. Can you imagine being someone who thinks they have nothing left to learn? Software gets an upgrade, if only to make minor improvements and fix bugs, and so should we.

As it turns out, there is a psychological effect around this phenomenon. Roughly summarized, most people tend to overestimate their capabilities. In 1999, two Cornell University psychologists, Justin Kruger and David Dunning, conducted a study and concluded that our own incompetence prevents us from seeing our incompetence. (Their finding is now referred to as the Dunning-Kruger Effect.) Think about it: If you don't do something well, you don't have the ability to know whether you actually do it well or not.

Circling back to professional development, it's highly probable that employees who think they have no need to learn anything new really do need to learn a thing or two. Here's where feedback comes into play: It's possible that people think they're experts at something because no one has ever given them any feedback. See where I'm going with this? Yes, I'm referring to those incredibly uncomfortable situations when we need to give someone performance feedback.

Giving someone feedback on additional skill-building, whether technical knowledge or soft skills, can often be



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sidestepped for a variety of reasons. One is that the employee does a great job, and while they might benefit from additional development, it's easy to excuse the improvements that could be realized in light of their otherwise overall stellar performance.

Feedback, however, doesn't have to be delivered in a negative manner. It's entirely possible to talk with an employee and tell them you are presenting them with an opportunity to upskill. Merriam-Webster defines "upskilling" as providing someone with more advanced skills through additional

education and training or acquiring more advanced skills through additional education and training.

The conversation with the employee might sound something like this: "You did such a great job with that situation with our member the other day, talking him through the registration process. Our system can be cumbersome, but you explained it so well. You also handled that difficult situation with the vendor very well. In fact, you do so well, I'd like you to upskill, to expand your skills. I'm offering you the opportunity to attend this session and

“

Software gets an upgrade, if only to make minor improvements and fix bugs, and so should we.

bring back what you learn to the office.”

Put that way, it's difficult for the employee to decline, isn't it?

But suppose they do try to wiggle out of the opportunity—what then? Point out another time when they didn't do as well and say that's the type of situation

you'd like to see them upskill because that expertise is needed in the office.

If they still feel they have nothing left to learn, they may say they were just off their game that day, they didn't eat breakfast that morning, it was raining, or they have some other excuse. If this happens,

they have essentially re-flagged the Dunning-Kruger Effect, but they don't need to know this. Just continue to assure them that this is a great opportunity for them, coverage for their job has been handled, and you're excited to hear about how the training goes.

In addition to an employee's lack of awareness about what they don't know, an element of fear may be involved in professional development. They may be afraid they'll be bored, that the office can't survive for a day without them or that they might not actually be capable of

improving. So, stick to the point of appreciating their skills and the opportunity for them to upskill.

In the words of Albert Einstein, "Life is like riding a bicycle. To keep your balance, you must keep moving." ●



Carole Kaptur, SHRM-SCP, RCE, is

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

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MEMBERSHIP



'We're All in This Together'

During economic downturns, associations should rely on each other more than ever.

BY MICHELE WOJCIECHOWSKI



You can't budget for what you don't know.

That's why National Association of REALTORS® CEO Bob Goldberg meets monthly with the association's Finance Committee to discuss the impact of inflation, the supply chain and other trends.

With a 15% decrease in membership anticipated over the next three years, NAR is leaning on strategic planning to measure every dollar it spends. Just as important, Goldberg says, is being transparent. "I call it 'management in the sunshine,' and I don't bifurcate it between good times and bad times," he says.

Keeping open lines of communication among AEs is essential: "It is a three-way partnership for a reason," Goldberg says. "Rely on one another. Use The Hub [there are private local AE and state AE communities at thehub.realtor]. Expand your network. No question is off limits. Those of us who have gone through it before know there is a light at the end of a downturn."

Advice at the State and Local Levels

It's crucial to plan and prepare for economic downturns before they happen, says Cliff Long, RCE, CEO of the Orlando Regional REALTOR® Association.

"One of the key strategies that we have used is diversifying our sources of revenue," he says. "One successful example is ORRA's for-profit arm—Orlando Regional Real Estate Network—which handles businesses that generate non-dues revenue. Through ORREN, we have been able to provide valuable services to our members, while simultaneously generating revenue for the association."

To access new resources and share best practices, the Orlando association has also collaborated with other associations, including Panama, Puerto Rico, Miami, Houston and Northern Virginia.

Teresa King Kinney, RCE, CAE, CEO of Miami REALTORS®, says that while it's been years since the association has had a decline in membership, understanding what members want and giving them what they need are essential for retention. "It's back to the basics and more education and training on core skills, along with hot topics that members need to be more successful," she says. "We reevaluate each of our products and services to redirect and retrain to the market need."

In Orlando, the association conducted focus groups to help understand members' needs, expectations and challenges. Long says, "All our benefits are focused on the return on investment for our members."

Like Miami, the Maine Association of REALTORS® is in the fortunate position of having increasing membership for the last 11 years. Currently, 86% of real estate licensees are also REALTOR® members.

"We have a statewide MLS, which is a subsidiary corporation of the Maine Association of REALTORS®. We also provide our members with a library of 80-plus legal forms—reviewed and updated annually—and a legal helpline to help our members manage their risk. With a statewide MLS and statewide forms, there is deep familiarity with the transaction process across the state," explains Suzanne Guild, CEO.

MAR also focuses on communicating its value. With state association dues

of approximately 50 cents per day, members gain a full suite of programming, advocacy support and much more.

Kinney says that Miami has used practical strategies to retain members, such as offering more than 4,000 events and seminars each year, including many in English and Spanish that can be accessed on the member portal.

"At dues renewal time, we offer cash discounts for payment on time, along with an education credit and even include a free designation course," says Kinney. "Most of our tools and services are included in their dues and MLS fees—even their Supra eKey."

Another way to retain members is quite easy: Respond! Guild says that the professional team's top priority is to be available and accessible and to shepherd members' suggestions to the appropriate decision-making body.

"On a regular basis, we hear from members who say, 'I appreciate that you answer the telephone,'" says Guild. "Members recall their customer service experience—good and not so good—even more than the products you are offering."

It's also vital to look at your work through your members' eyes. "I always remind our staff that our members wake up every day unemployed—they aren't paid until they make a sale," Goldberg says. "Recognize that and be there for your members. That empathy goes a long way." ●

Michele Wojciechowski is an award-winning writer based in Baltimore.



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Invest in Yourself

South Carolina REALTORS® CEO
Nick Kremydas makes it a
regular practice.

Nick Kremydas, RCE, CEO of South Carolina REALTORS®, cautions even experienced association executives who begin to think they know it all. As a nearly 30-year association veteran, Kremydas talks about the value of professional development, his go-to resources and the (not so surprising) way he motivates staff.

Q: Nick, how did professional development help you make the move from senior vice president and general counsel to CEO?

I was fortunate to have a leader and mentor, Jim Peters [CEO at South Carolina REALTORS® from 1993 to 2006], who encouraged me to get outside my comfort zone and develop my skills. He had the courage to point out my weaknesses, and I wasn't afraid to take constructive criticism. I soaked it up like a sponge—it made me want to improve and build on my talents. This may sound weird, but my favorite part of annual performance evaluations is the discussion around how to improve to better serve our members.

Q: What has been the value of the RCE designation in your career growth?

The RCE designation is a great foundation upon which to build a great association executive career; it helped me gain insights that were not covered by my legal and legislative activities. From there, I've added a few floors—I've taken several other designation and certification courses as well. To better understand our members and their business, you have to walk in their shoes, see the industry from their perspective. If you're a new AE, you owe it to your team and your members to invest in yourself.

Q: What other professional development resources are your personal go-tos?

The network of state and local AEs is one of the best resources we have. There is always someone out there who can help with your self-improvement and your service to others.

I also read constantly—I recommend the Feedly app to help organize and manage your media content—and as I travel around South Carolina, I'm always listening to the latest real estate or political podcasts and books. As AEs, we're expected to know the news about our industry as it happens—sometimes before it happens!

AEs also have to seek out those resources that will benefit their team. For example, did you know that Adobe has an annual creativity conference called Adobe Max (adobe.com/max.html)? Did you know it's online and free to register for licensed users? The ideas generated by this one event alone take our communications to another level each year.

Q: How do you motivate staff to pursue further professional development?

Doughnuts and Starbucks.

Q: In a nutshell, why would you say continuous learning is important at any level?

Routines are comfortable, but it's the siren's call that will lead to an association that's stagnant and not providing its members the best experience. I love my job because I continuously challenge myself and my team to improve, do more, think differently. We have an open and engaging environment that allows our members to challenge us with ideas and concepts. That's the difference between simply managing an association and leading an association. I don't want to be a manager—I want to be the best servant leader I can be. As AEs, we can be the example for others to follow—and that includes education. ●



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