

# REALTOR® RAE

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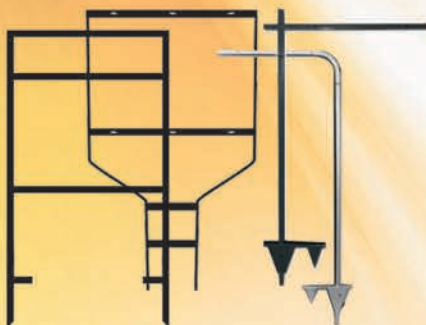
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The REALTOR® AE editorial board reviews each issue and provides critical feedback, proposes story ideas, and stays in touch with fellow AEs nationwide to scout out new programs and products to share with the AE

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

# My Takeaway From AEI: Positivity



**Rebecca Grossman, RCE, GREEN, CEO, Scottsdale Area Association of REALTORS®, Ariz.**

When I returned from the 2018 Association Executives Institute, I immediately tried to reflect on what my big takeaway was and how I could put something I learned into practice right away. Like many of you, I was on an AEI high for quite some time. I'm still full of ideas and renewed enthusiasm, and I want to take advantage of that before the day-to-day association challenges steal my thunder.

What resonated with me the most at AEI was Jon Gordon's "power of positive leadership" message. I found ample opportunity to reflect on his message my first week back. We had a board of directors meeting and I was so pleased with the positive energy that the group exhibited. I feel very fortunate that my leaders over the past several years have been very encouraging and have made good things happen because they believed in the vision and direction of the organization and they projected a positive image and can-do attitude.

Unfortunately, I have not always had positive leadership. There have been years when the leadership's negativity was truly detrimental to the organization. Negativity

paralyzed the board and kept it from making the tough decisions. These leaders were unable to overcome the pessimism painted by the association energy vampires that Jon described in his CEO workshop. We all know these people and we sometimes let these few individuals pull us into that destructive vortex. I think Jon Gordon's words that "your positivity must be greater than all the negativity" is sound advice, and should I meet up with those energy vampires again, I will be ready!

Another idea from AEI that I plan on implementing with my association came from Tricia Thomas' session on building culture. She stressed the importance of having a strong, sustainable culture, but what I found most compelling was her emphasis on defining this culture and communicating it to our members and our community. I can't wait to have a session with my staff to start the work on our culture commitment. The questions Tricia urged AEs to consider are: What are

the behaviors and the beliefs that we value most for our staff and our members? What is that environment that we try to create when our members come to visit us? What are the behaviors that we expect from our leaders? What makes us different and how do we communicate that difference? What is there in our culture that is hurting us and how can we turn it around?

Those moments that stood out for me at the Institute relate well to this issue of REALTOR® AE. To build positive leadership and a strong culture, you must be able to communicate with your members on a personal level, and we are all looking for ways to do that through technology. How can we interact with meaning and intent to members with the right message at the right time?

I can't wait to learn from my fellow AEs who will share their ideas in this issue. After all, as you may have heard me mention recently, we are all about sharing.



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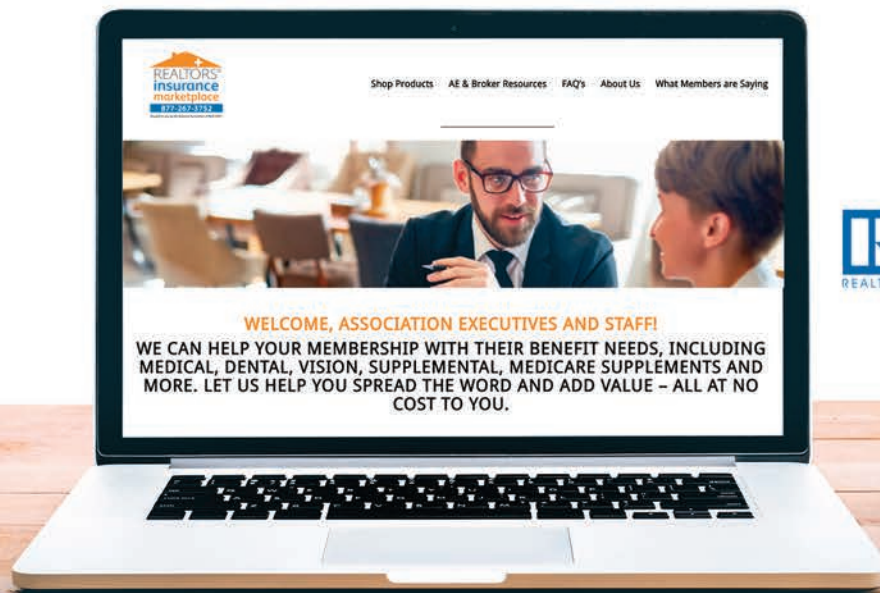
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# Local Association Battles the Scars of Racial Discrimination

Before the Fair Housing Act of 1968, many Americans faced discrimination when seeking to buy a home. In Memphis, Tenn., not only were people of color denied the opportunity to live where they chose, but there was more segregation in real estate: Black real estate professionals could not belong to the REALTOR® organization.

By the time Glenn Moore, owner of Glenn Moore Realty outside of Memphis, became president of the Memphis Area Association of REALTORS® in 2010, the organization had been admitting black real estate professionals for decades. Yet he felt there was much more to be done.



Cheryl Muhammad (left), NAREB officer and MAAR director; Glenn Moore, former MAAR president; and Sherita McCray, 2018 president of the Memphis NAREB chapter.

“I think everyone was aware of past discrimination [in the REALTOR® association], but many felt that since outwardly discriminatory practices had ended a long time ago, everything was fine,” says Moore. “But I began to recognize a few customs that I suspected might be creating barriers preventing participation by the African-American community in our local REALTOR® association.”

One of those barriers was the lack of recognition of the history of contributions made by black real estate professionals in

the community—specifically, there was no black REALTOR® Emeritus at the association and no permanent tribute visible in the association office.

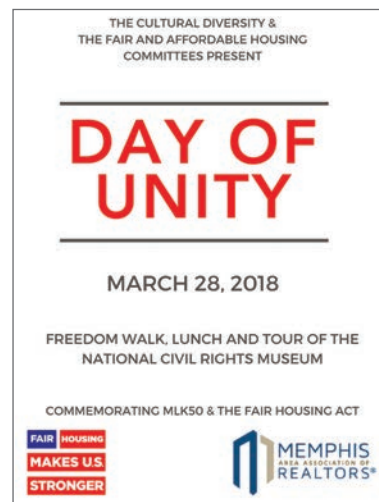
“When I was the association president in 2010, I asked our staff to research our admitting of African-Americans,” says Moore. “The year of first admittance was 1975, at that time six years short of qualifying for emeritus status. This set into motion exploring ideas on how we could rectify a custom that withheld an honor and inflicted a monetary penalty upon our African-American membership.”

Moore established a committee of staff and leadership to find a solution. This group became the foundation of the association’s cultural diversity committee that is still active today.

“The essential elements of our plan included grandfathering for those who were licensed in Tennessee but were denied membership and a grace period to compensate for a period of trust-building past 1975 when the discrimination ended,” says Moore.

This acknowledgment of past discrimination and the effect it has had on African-American real estate professionals enabled the Memphis Area Association of REALTORS® to forge a closer relationship with the local chapter of the National Association of Real Estate Brokers, established in 1947 by African-American real estate professionals as an alternative for those who were excluded from the National Association of REALTORS®.

“I had already been meeting with lead-



More than 100 people attended the MAAR Day of Unity event in March commemorating the Fair Housing Act and the 50th anniversary of Martin Luther King’s assassination.

ership of the Memphis chapter of NAREB, which had an understandably great mistrust for our REALTOR® organization due to past discrimination,” says Moore. “Over time, we developed a good relationship and planned a historic joint meeting, which had never happened in our 100-year history.”

The diversity groundwork laid in 2010 continues today with cultural diversity committees that are active and intentional about including and promoting professionals regardless of gender, race, or sexual orientation. “Locally, our association staff and leadership are very engaged in the diversity process and continue to work toward being a truly inclusive association,” says Moore. “Our state association also continues to improve; just in the past few years we installed our first openly LGBTQ and African-American state presidents, and the state now has an active diversity committee.”

These efforts have helped shift the culture of the Memphis association, says Glenn, who believes other organizations could learn from these efforts.

“To remain relevant, our associations must serve our full membership and have a leadership team and staff that looks like our membership,” says Moore. “Although these steps have helped lead us to a more unified local association, continued assessment should be a part of maintaining a healthy organization for all of our associations.”



Infographics in NAR's 2019 S.M.A.R.T. Budget Initiatives booklet illustrate where costs were reduced and how new funds will be spent.

## NAR BOD to Vote on 2019 S.M.A.R.T. Budget Initiatives

On May 19, the National Association of REALTORS® Board of Directors will consider a budget proposal that includes \$35 million in new programming for its 1.3 million members. The additional funding will go to the association's new S.M.A.R.T. Initiatives (Strategic Measures Advancing REALTORS® to Tomorrow). This proposed investment in the members' future is \$30 per member. If approved, local and state associations are encouraged to follow NAR's lead in communicating the news with a focus on transparency and member value. A booklet, presented at the 2018 Association Executive Institute, laid out the background and rationale for this new programming. "With the transition to an information economy and the digital landscape populated with smart phones, smart TVs, and smart homes, the new day at NAR demands a smart NAR," said NAR CEO Bob Goldberg.

For more, visit [nar.realtor/smartbudget](http://nar.realtor/smartbudget).

# Candidate Vetting Surges Ahead of Midterm Elections

National Association of REALTORS® political advocacy facilitators have been criss-crossing the country training REALTOR® association leaders on selecting political candidates to back in upcoming elections. In California and Vermont, Oregon and Louisiana, REALTOR® associations are gearing up for the midterms by hosting NAR's Best Practices for Choosing REALTOR® Champions course.

This three-hour training session was developed by NAR to provide best practices for RPAC trustees, government affairs committees, or other committees that disburse money to candidates at their state or local associations. "One great takeaway for members tends to be the realization that REALTORS® back candidates who support our issues, our industry, and private property rights, and not simply because the candidate is a Republican, Democrat, or a friend," says Kyle Lambert London, NAR's REALTOR® Party education manager.

The training provides hands-on assistance and time-tested templates to identify and support political candidates who are best qualified to represent the issues important to REALTORS® and real estate. "Association staffers really appreciate that we provide several useful sample documents as guidelines, including candidate questionnaires, procedures for interviews, sample candidate score cards, conflict of interest policies, etc.," says Lambert London.

The North Dakota Association of REALTORS® recently offered the course to leadership and local AEs. "We felt it was a key time to offer the training," says CEO Jill Beck, "because it's an election year and half of our legislative representatives are up for election, plus our local boards also have city and



The Cincinnati Area Board of REALTORS® endorsed and campaigned for Cincinnati Mayor John Cranley re-election race in 2017. "He is a true REALTOR® Champion," says Mark Quarry, CABR's director of government affairs, "often seeking our opinion and involving our organization on key issues facing the city of Cincinnati." [Read more on page 24.](#)

county races."

One of the main messages of the course is that REALTOR® associations are nonpartisan, and endorsements are not party-based. "We are the REALTOR® Party in all our advocacy efforts, although we will always have a few members who choose not to believe that," says Beck. For instance, she said, they offer interviews to all state office candidates who will be on the ballot regardless of party affiliation.

How to reach out to candidates not familiar with the REALTOR® organization and educate them about real estate issues is a key skill taught in the course. "We had some local boards who didn't support races if candidates didn't come to them," says Beck. "They now know they need to reach out and interview candidates and educate them about our industry and our concerns."

In addition to the course on Choosing REALTOR® Champions, NAR offers a candidate training academy for members and AEs interested in running for public office.



## REALTORS® Transform Urban Space in Greenville

Like many small southern towns, Greenville, S.C., is seeing an unprecedented level of redevelopment with residential, commercial, parks, and green space all flourishing. But also like a lot of growing cities, portions of the community are either overlooked or slow to see underused spaces transformed.

Timing for a REALTOR® association project could not have been better. Just when the Greater Greenville Association of REALTORS® was making community engagement and placemaking a priority, the city of Greenville was looking for help to give new life to one of its underutilized spaces. The project, named The Plaza in the Village of West Greenville, had the potential to fast-track the revitalization of one of the most historic parts of downtown. The city, along with the local business owners association, targeted for development a blocked, dead-end street between rows of historic buildings.

The plan was to transform this space into a place where residents could gather and where businesses could hold outdoor events. It would be the focal point and centerpiece for

the neighborhood.

According to Tracy Ramseur, the city's senior economic development project manager, the need for the space is driven in large part by the community-minded entrepreneurs opening businesses in the area. "The village of West Greenville is fortunate to have an eclectic mix of small businesses ranging from artist studios to restaurants that host a variety of free community events attracting hundreds of people to the village's epicenter. The new plaza will serve as the ideal backdrop for those special events."

The Greater Greenville Association of REALTORS® partnered with the city of Greenville by providing a \$3,000 placemaking grant from the National Association of REALTORS®. "Placemaking can help foster healthier, more social and economically viable communities by creating places where people can interact and engage," says Lisa Deluca Alexander, 2018 Greater Greenville Association of REALTORS® president. "We are excited that through our contribution and involvement in this project, we were able to help transform an underutilized

space into a vibrant public plaza where friends and neighbors can come together."

This project involved a lot of moving parts, with citizens, business owners, and nonprofits all providing input. In the end, the finished project exceeded all expectations.

On Feb. 22, the city held a ribbon-cutting and news conference. Not only did multiple media outlets report on the project, but a large community presence also turned out. Gratitude from the city council, residents, and business owners for NAR's placemaking grant was clearly evident.

NAR's community outreach grants (Housing Opportunity, Diversity, Smart Growth, and Placemaking) enable REALTOR® associations to strategically engage with their communities and work as partners for redevelopment. These grants have become so popular among local associations that NAR reached its budgeted allowance for 2018 and recently announced additional funding of grant applications through June. To apply, visit [nar.realtor](http://nar.realtor) and search for "placemaking."

*By Nick Sabatine, RCE, CAE, CEO, Greater Greenville Association of REALTORS®*

## Congratulations New CAEs

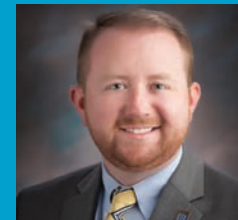
These four REALTOR® association executives have earned the CAE (Certified Association Executive) designation from the American Society of Association Executives. The CAE program serves to elevate professional standards, enhance individual performance, and designate those who have acquired and have demonstrated knowledge essential to the practice of association management.



**Jessica Hickok, RCE, CAE, CEO,**  
Oklahoma Association of REALTORS®



**Shane Johnson, CAE, COO,**  
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## NAR Addresses Questions on MLS of Choice

As with questions on how to implement and plan for the upcoming change to MLS membership policy, also called MLS of Choice, gathered at the March AE Institute for a question and answer session with Caitlin McCrory, MLS manager at the National Association of REALTORS®.

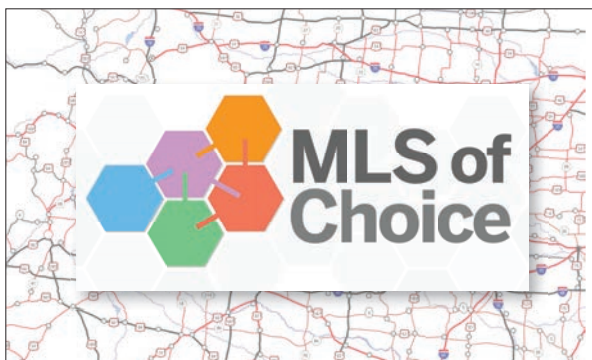
MLS of Choice (or MLS Policy Statements 7.42 and 7.43) passed by the National Association of REALTORS® Board of Directors in November and effective July 1, requires MLSs to offer REALTORS® an opt-out waiver if they don't use the MLSs' services but join another MLS.

For many brokers and agents, who no longer have to join and pay for multiple MLS memberships, this policy shift is a financial and managerial win. For many MLSs, however, the change will require new administrative duties to track where licensees subscribe. Currently, no complete database exists to show where brokers and licensees receive MLS service, but NAR is reviewing NRDS, the National REALTORS® Database System, database to determine potential methods of tracking where members have MLS subscription privileges.

Although many MLSs have had waiver programs in place for years, the policy is new for others, prompting concerns and questions that McCrory sought to answer at the AE Institute meeting. For example, "How do we police that non-subscribers are not accessing the system using someone else's log-in?"

one AE asked. In fact, several questions related to uncovering and stopping the various ways that non-subscribers might devise to circumvent the policy, such as putting information in the comments field that directs MLS subscribers to contact a non-subscribing REALTOR® for showings.

In response, McCrory noted that the Carolina MLS has had a waiver policy in place for 17 years, and out of 11,500 subscribers, it averages just a handful of

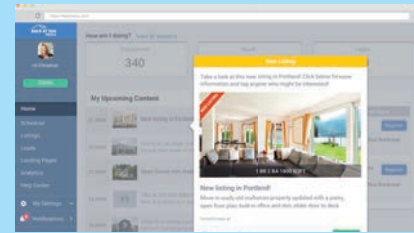


violations a year. To catch violations, including password sharing, Carolina MLS uses a technology that is "not inexpensive," McCrory said.

Some AEs expressed concern over the financial impact of losing subscribers to neighboring MLSs that have a more active market. Overall, however, members lost to other MLSs should balance out with new members gained from neighboring MLSs, McCrory predicts.

Other questions McCrory fielded related to MLS access by real estate teams, co-mingling of data in IDX feeds, and MLS of Choice at broker-owned MLSs. Answers to these questions and many more are posted in the regularly updated FAQs at [nar.realtor](http://nar.realtor). Search "MLS of Choice."

### New REALTOR Benefits® Program Partner



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Your members now have a new way to promote their business on Facebook, Twitter, LinkedIn, and additional social media platforms with Back At You Media, the newest partner in NAR's REALTOR Benefits® Program. This real estate technology innovator provides a simple and automated way members can promote themselves and their listings on their social networks to generate leads, maximize branding efforts, save time and money, and prove their value to clients. Plans are designed to suit any comfort level. Available exclusively through the REALTOR Benefits® Program, there is an NAR Starter Plan at \$10/month for those who are just getting started with social media marketing. Members with more advanced needs will enjoy \$100 off the activation fee on plans with additional features. There is also an enterprise plan for brokers. To learn more, visit [nar.realtor/RealtorBenefits/BackAtYouMedia](http://nar.realtor/RealtorBenefits/BackAtYouMedia).

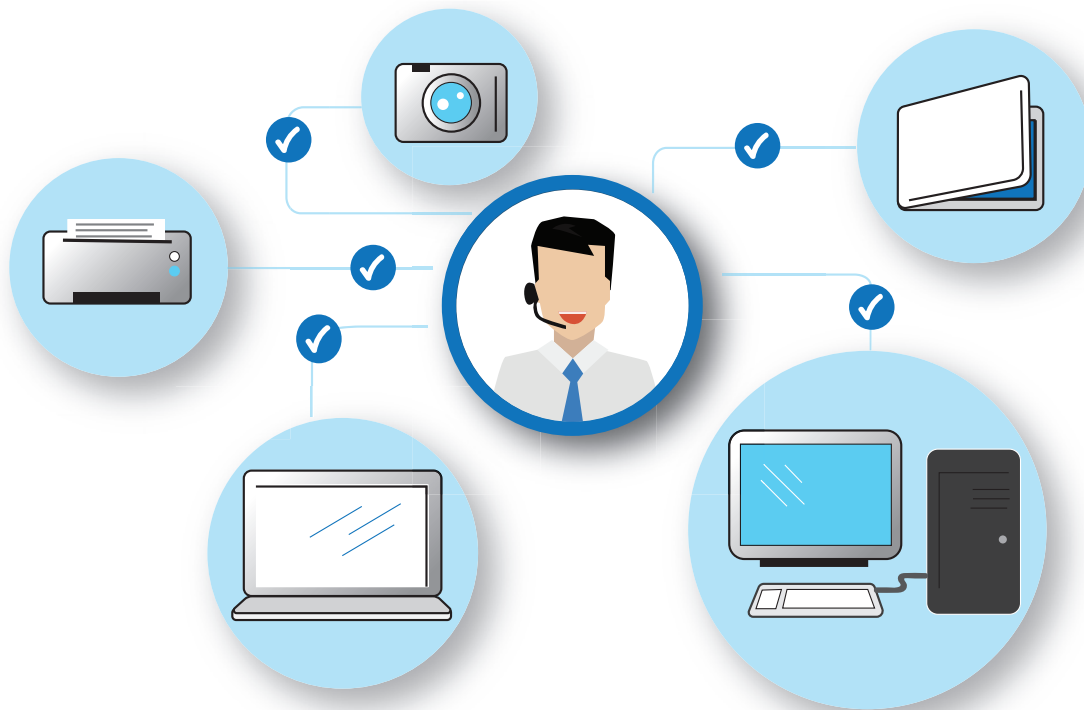


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# Put the Personal Back in Your Technology

By Carolyn Schwaar



How to make your member engagements more individual, targeted, and relevant.

Every time I log onto Facebook and it serves up photos of “people you may know” who aren’t anyone I’ve ever met, I become a little disappointed. Don’t you know me by now, Facebook?

Personalization is expected online today. I expect Amazon to recommend something I want to buy based on my past purchases. I expect NYTimes.com to suggest something I want to read based on what I’ve read before. I expect websites I frequent to say

“Hi, Carolyn!” because if they don’t, I must not matter to them.

The internet’s biggest companies realize that personalization builds loyalty, and personally relevant content improves how consumers feel about a brand.

According to the global management consulting firm Boston Consulting Group, “Brands that create personalized experiences by integrating advanced digital technologies and proprietary data for custom-

A recent Accenture Consulting study found that 55 percent of nonprofit donors would give or volunteer more in exchange for a more personalized experience.

ers are seeing revenue increase by 6 to 10 percent, and two to three times faster than those that don't."

And there's a growing belief that this consumer trend is affecting associations. According to a study by the association management company Abila, "Today's members have higher expectations of how technology can be used to personalize their experience with organizations to which they belong."

The good news for REALTOR® associations is that personalization doesn't have to be expensive or time-consuming. True, the personalization efforts at large brands include dedicated personnel, sophisticated big data design, behavioral analytics software, and artificial intelligence, but there is a wide range of opportunities to personalize your association's interactions with members. You're probably practicing personalization already.

The first step, though, is to ensure that your association staff and leaders buy into why personalization is important. The self-service online portals you've invested in that enable members to pay their dues, register for classes, watch webinars, and earn CE credits without ever talking to a staff person are important advancements in your association management processes, but they have one drawback: lack of human interaction. Personalization, studies show, gives members a sense of community and identity; they cease to be one of the masses and instead become an individual with unique wants and needs that are being addressed.

A recent Accenture Consulting study found that 55 percent of nonprofit donors would give or volunteer more in exchange for a more personalized experience.

It's easy to see how personalization (based on past activity or accomplishments) can drive participation, attract volunteers, draw attendees to events and classes, and boost involvement in legislative calls to action and investment in RPAC.

Here are a number of ways you can ensure that the personal remains at the forefront of the membership experience.

## Create customized content and exclusive offers

Instead of sending the same email newsletter to all members with the same news and information, segment your membership list ac-

ording to a range of factors, such as new members, top producers, conference attendees, active volunteers, and broker-owners.

According to the Community Brands Digital Member Study (2017), nearly 70 percent of surveyed members expressed interest in receiving personalized content based on their past activity—this is especially true for millennials and Generation X members.

For one member who is a top producer, for example, a personalized newsletter might include an exclusive invitation to register early for an event. Members who attended your conference may be interested in presentation slides, while those who didn't attend likely won't be as interested. Offer personalized session and event recommendations based on previous class attendance or experience level.

Kyla McKown Barcus, director of communications and outreach at the Kansas City Regional Association of REALTORS®, uses the Click Dimensions product within the RAMCO member management system to regularly conduct targeted member communications. "We have automated drip email campaigns for segments, such as new members who receive a series of 20 emails over a four-month period," she says. "We plan to do much more segmenting and our hope is to be able to use both our association data and MLS data to customize our messaging. For example, we hope to launch education promotions based on both previous class attendance and agent productivity markers to send more personalized CE recommendations."

## Invite members to choose their personalization

Tailored email newsletters help members get information only on the topics they're interested in and most likely to engage with instead of updates that don't apply to them. But be careful not to pigeonhole members without their input. Your new member may not be new to real estate, and your older member may actually have been inactive for the past decade and needs to be brought back up to speed. Ask members to fill out a form or otherwise opt into personalized content.

Christy Broccardo-Grove, digital media manager at the Illinois Association of REALTORS®, offers several communication subscription options to members using the RAMCO email platform.

Julie Franzese, director of communications and marketing at the

Greater Rochester Association of REALTORS® in New York, recently launched an online portal where members can log on to a personalized page to pay their dues and register for classes. The portal (a new feature in their MMSI membership software solution) also has personalization capability, enabling Franzese to select groups to target for messages. “A recent message about appraisal classes was posted only to the portal of our appraiser members,” she says, “and soon, we will have the ability to show members the classes and events closest to them since we cover a large geographical area. We love the portal, and our satisfaction rating with respect to communications on member surveys has increased by more than 20 percent.”

## Collect data on members and reflect it back to them

If someone won your REALTOR® of the Year Award, always identify their communications with that information. If members serve on a committee, always identify them with their involvement. The same goes for Golden Rs, leadership past and present, and designation holders. Show members that you value their accomplishments and contributions.

Not every membership database system or email newsletter software is set up to automate personalization today, but as the trend continues, expect the technology to become cheaper, more sophisticated, and more available. Start collecting the data about your members now that you'll need to build effective personalization in the future.

## Never pass up the opportunity to interact in person

It may sound obvious, but personalization can be as simple as listing your phone number or office location on your website and inviting members to call or stop by. The Miami REALTORS® “contact us” website page encourages members to visit “your beautiful Miami headquarters” in person and enjoy a “great cup of Starbucks coffee.” Many associations, including the Chicago Association of REALTORS® and the national association, offer a live chat option online for members who just need a bit of personalized assistance on demand.

## Engage members where they are most comfortable

A multichannel approach to member engagement creates a more relevant and personalized member experience. Just imagine how impersonal a text message seems to a member who doesn't text, or an invitation to join a Facebook group sent to a member who doesn't

use Facebook. By using questionnaires and opt-in preferences, you'll learn which channels will be most effective to reach and engage members.

## Invite members to like, dislike, rate, and comment

Personalization is a two-way street, meaning that members want you to see them as individuals with likes, dislikes, and opinions, so let them express these wherever possible. The Greater Albuquerque Association of REALTORS® website is built on a platform that includes a comment field under each article. However, if managing members' disparate comments isn't feasible, try posting a quick evergreen “how was your experience with us today?” survey on your website with a link from your emails. This feedback mechanism shows members that you're listening, and it can help you identify and resolve issues before they escalate.

## Show your personal side through video

You've probably heard that video is one of the hottest and most effective ways to engage with members. You may even have a weekly or monthly member video that you or your association president posts on YouTube. Take your videos to the next level by customizing them for different audiences or create a monthly video for new members or an exclusive brokers-only market update. Video is very personal by nature, so be yourself in videos, friendly but professional. Introduce staff and give members the opportunity to get to know leadership, as well.

## Don't anonymize your social media

Facebook is naturally one of the best ways to personalize association communications because, although the messages aren't often to an individual, they are from real people. However, many associations have branded accounts that take the personal out of the platform. Although consistency is important in messaging, rally leadership, committee members, and volunteers to help spread news about association products and services from their personal accounts.

## Send greetings and congratulations

Facebook sends you a birthday greeting, so why not send one to your members? Bob Jones, director of communications at the Dayton Area Association of REALTORS®, uses his member management software to wish members a happy birthday and a happy anniversary of joining the association. Look around and find the personalized experiences in your daily life and extend those to your members.



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# Reviving a Culture of Live Event Attendance

By Shane Johnson, JD, CAE, Chief Operating Officer, Cape Fear REALTORS®, N.C.

**When I was a young boy, when school was out for summer, Thursdays were for lunch with Grandpa at the VFW Hall. After a flurry of handshaking in a sea of bobbing green garrison caps, we'd pray, salute the flag, and eat. One thing that had not faded through the years was the strong sense of welcome and camaraderie at each gathering. Grandpa rarely missed the weekly meetings. When they closed the lid on his coffin, his VFW cap was tucked under his arm.**

**W**hat compelled a busy father of four and business owner to eat a ham sandwich and potato salad with the same group every week? Perhaps patriotism, but I believe it was more. Grandpa was equally adherent to regular calls by the Kiwanis Club and Zion Lutheran church. He was a "joiner," part of the Greatest Generation that regularly attended meetings as an accepted, almost dutiful, role in society. In large measure, associations were built on this societal norm.

## **Technology replaces in-person experiences**

Baby boomers like me were influenced by our parents and grandparents, but then technology created an addictive alternative: the internet. Associations have struggled in recent decades with attendance at live events. Amid the digital onslaught, many questioned the way forward. How should nonprofits shift or evolve to remain relevant?

"Seven or eight years ago, in the face of declining attendance and new norms, industry leaders began looking at ways to address an apparent shift online for community-building," says Reggie Henry, chief information and engagement officer at the American Society of Associa-

tion Executives. "Members appeared to be abandoning in-person experiences for digital touch. Many organizations adapted accordingly, with some overcorrecting, during this period."

I experienced this trend as an AE. At Cape Fear REALTORS®, N.C., our hosted annual events that once had strong attendance began to falter. Instead of regularly drawing 15 to 25 percent of membership as in earlier decades, by 2010 only 5 percent would attend.

Certainly, baby boomers and Generation Xers were busy, and the internet made it possible for them to network online with fellow REALTORS®, receive association information and services, and participate in elections, advocacy, and community outreach without attending events in person. Associations responded by investing more time and money into online engagement including social media, blogs, and online education.

But millennials (ages 22 to 37) have different ideas, and they're having an effect on the rest of us.

## **Millennials bring it back to basics with in-person participation**

A 2017 poll of adults in the U.S., conducted by event technology platform Eventbrite (in partnership with Ipsos





**“ Our YPN council members try to personally invite members to events instead of just relying on email blasts or Facebook invites. It’s been really encouraging to see the spark back in our association.”**

—Jenny Gailey, communications and professional development director, Rockford Area REALTORS®, Ill.

and Crowd DNA) found that millennials, often referred to as the “experience generation,” continue to be the driving force behind the growing attendance at a diverse range of live events. Although millennials rely heavily on technology, they are also the strongest believers in face-to-face interaction: 9 out of 10 millennials have attended at least one live event within the past 12 months. Nearly three-quarters (73 percent) believe that attending a live event is the best way to show others what they are interested in, the survey found.

Similarly, while many people build their personal brand online, millennials view attending live events as a powerful way to express themselves, with 73 percent saying attending a live event is a form of self-expression, versus just 48 percent of other generations.

At the Charleston Trident Association of REALTORS®, attendance at the annual Residential Market Update has nearly doubled in the last five years since the association made an effort to attract millennials, says CEO Wil Riley. Riley notes that content is key to connecting with members and for millennials, the value proposition needs to include a philanthropic component and a business or personal improvement portion. “New-member attendance has increased, which I believe is a result of both an improved value offering and focused marketing.”

### **Live events, “giving back” increases attendance**

That same approach has allowed Cape Fear to grow a culture of attendance. Tapping into this desire for live events, and adding a dose of “giving back,” Cape Fear launched REALTOR® Action Day in 2015. The first year’s goal was 300 participants—we had 400. Each year the event has grown. This year, the goal is 750 participants, with 25 activities ranging from planting sea oats for stabilizing coastal dunes, to visiting senior centers.

Granted, the real estate industry has improved during that same cycle, yet an increasing percentage of event seats are being warmed by 20- and 30-year-olds. This is contrary to what many professionals have been led to believe about the “non-joining” generations.

“We’ve found that younger generations are highly interested in participation,” says Charlotte Regional REALTOR® Association CEO AnneMarie DeCatsye. “They do things differently than their parents, value time differently, and look for specific end results. We’ve had a great response by listening to members of various generations and then creating activities that address these needs, sometimes together, sometimes separately. A couple of years ago, we began a 5K called Strides for Shelter to raise money for housing, and while most of last year’s 450 participants were younger, it engages an important segment of membership.”

The events millennials prefer—highly personal, short and

## Millennials, often referred to as the “experience generation,”

continue to be the driving force behind the growing attendance at a diverse range of live events. Although millennials rely heavily on technology, they are also the strongest believers in face-to-face interaction: 9 out of 10 millennials have attended at least one live event within the past 12 months.

focused, charitable and fun—are affecting associations’ programming. “We just scheduled a two-hour TED talk-style YPN knowledge session at our next convention with a networking event in the evening,” says Michigan REALTORS® Communication Director Joe Kras. “Our state YPN committee suggested topics like how to prepare for filing your taxes, investing in your future, and establishing write-offs, rather than the typical topics such as sales and marketing tips.”

At Cape Fear, we’re launching a micro-volunteering program to provide members the chance to volunteer for an hour or two at a time on small projects or events instead of requiring a year-long commitment in joining a committee.

### **Keeping it current**

Jenny Gailey, communications and professional development director at Rockford Area REALTORS®, Ill., says more younger members attend events because fellow young members are planning the content. “Our YPN is very active and the events they host—Epic Water Battle, Boo Bash, Rock the Block—are all very well-attended by [the general membership]. In fact, we’ve had other committees ask the YPN council to help promote or partner on events because they know how to draw crowds. Our YPN council members try to personally invite members to events instead of just relying on email blasts or Facebook invites. It’s been really encouraging to see the spark back in our association.”

Maintaining relevance is a balance of engaging online and in-person, says ASAE’s Henry. “[Relevance] requires leadership to reevaluate its view of membership, offering new ways to engage with members beyond the old committee structure.”

Facebook, Twitter, and Snapchat will continue to be part of the membership equation. Clearly, both young and old understand that there is no replacement for face-to-face encounters. If you create the right environment, momentum will fuel an irresistible return of members to in-person experiences—with or without potato salad.

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*Frank J. Williams, REALTOR®  
Chicago, IL*

“There weren’t any people  
that looked like me.”

**Frank Williams has witnessed a lot in nearly 80 years.** After growing up in Flint Michigan — and being expelled from high school for dating the white girl he later married — he moved to Chicago in 1962. Despite having never considered real estate as a career because, “as a young black man, we didn’t see many people in our community in positions of power,” he received his real estate license in 1966 and opened his own firm in 1969. His practice faced immediate resistance for helping African Americans find homes in historically white neighborhoods. In 1971 demonstrators entered his office to demand who he could sell to, and in 1975, his home was firebombed. Overcoming these obstacles, he ascended to president of the Chicago chapter of the NAACP, president of the Chicago Association of REALTORS®, and was voted REALTOR® of the Year. “As a black American, a REALTOR®, and a parent, I am determined to help erase discrimination from the housing landscape.”

April 2018 marks the 50th anniversary of the Fair Housing Act. We recognize that progress made stands on the broad shoulders of people like Frank Williams. We’re grateful for the work he’s done and sacrifices he’s made, and understand there’s more progress to be made.

Visit [www.FairHousing.realtor](http://www.FairHousing.realtor) to read more about Frank and to join the commemoration.



# Tired of Installing Software?

AEs find benefits and limitations in outsourcing association technology.

Software, servers, Wi-Fi, cloud storage, virus protection—it's enough to make even the most tech-savvy AE want to just unplug.

Fortunately, your job description doesn't have to include "IT pro." Today, there's an IT outsourcing option to fit every size association and budget.

"Hiring a full-time person would cost me several times what I pay for outsourced services to keep our technology up and running for our staff and members," says Rob Wigton, executive vice president of the Williamson County Association of REALTORS®, which has 2,600 members in Tennessee. "We outsource the installation of new hardware, data storage, maintenance, setting up new staff with email, and other needs," he says.

Mike Valerino, COO at the Akron Cleveland Association of REALTORS® with 5,500 members in northeast Ohio, isn't ready

to put all of his association's tech into the hands of his current outside IT firm. Although the association has outsourced its IT for several years, Valerino spends a significant amount of time coordinating IT requests from staff and members and then following up to make sure the work is done correctly. "It's hard to find a good partner who will take the time to learn how you use IT and provide you with rapid and responsive service," he says. Valerino is considering hiring a full-time IT coordinator to take the IT burden off his shoulders.

There is no one-size-fits-all solution to the issue of outsourcing IT services. A small association that can't afford a full-time IT professional might choose to outsource, hire a part-timer, or share a staffer with a neighboring association or a local nonprofit with similar needs. A large association with more resources might use a combination of internal and external resources.

"When we upgraded the sound system in our training room, our vendor gave us advice on what to purchase and then installed it for us. The vendor also helped us with issues we hadn't considered, like networking our printers for greater efficiency."

— Jim Haisler, RCE, e-PRO, CEO, Heartland REALTOR® Organization, Ill.

The 47,000-member Miami Association of REALTORS®, with seven full-service offices in south Florida, has two in-house IT professionals who make sure the connections between the membership system and outside vendors are operating properly.

"We have found that no one IT management vendor can provide everything we need," says Teresa King Kinney, RCE, CAE, CEO. "Instead, we want the flexibility to choose the best systems out there, and that's a moving target. So once we finalize a

“We outsource the installation of new hardware, data storage, maintenance, setting up new staff with email and other needs.” — Rob Wigton, EVP, Williamson County Association of REALTORS®, Tenn.

contract with an IT vendor, we work them to customize the product and integrate it with our current services.”

Also opting to blend staff skill and managed services, Ryan Castle, CEO of the Cape Cod & Islands Association of REALTORS® in Massachusetts with 2,600 members, outsources server management, computer support, email account management, and other “back-end” IT services to a local firm. Front-end services, such as social media, video conferencing, and the collaboration platform, are managed by the association’s millennial-generation staffers.

“Too many people make technology a complicated topic,” Castle says. “But if your staff knows how to use software and applications, you can outsource the monitoring, security, backup, and disaster recovery functions. IT companies can handle those functions efficiently and quickly, so your team can focus on that all-important interface with your members.”

### Why outsource your IT?

Besides cost and convenience, REALTOR® associations outsource their IT services for other benefits. First, technology moves quickly, and it’s difficult for associations to keep pace. A staffer might know how to design a website, set up a video conference, or manage voice mail but not understand mobile apps or team collaboration platforms. So, it might be easier to find the right IT skills from an outsourced provider.

As specialists in the IT sector, outside vendors can help association executives select the right equipment and software, and explain the finer points of new IT products. “When we upgraded the sound system in our training room, our vendor gave us advice

on what to purchase and then installed it for us,” says Jim Haisler, RCE, e-PRO, CEO at the Heartland REALTOR® Organization, Ill. “They also helped us with issues we hadn’t considered, like networking our printers for greater efficiency.”

Next, consider the disruption to you and your members in the event of a power outage or server crash. Today’s managed service providers can offer your applications and data on a cloud architecture. This is not only important for disaster recovery, but it also makes it easy for staffers who work remotely to access the information needed to do their jobs.

“If we need to close our offices for a blizzard, we can continue to work remotely,” Valerino says. “Our vendor also provides cloud-based phone and video conferencing that has made it easier for us to collaborate

### Best practices for IT outsourcing

- Research potential vendors
- Get references to narrow the field
- Prepare a request for proposal that specifies your desired services
- Establish expectations for responding to problems
- Negotiate the hourly rate for service calls
- Look for flexibility to handle special projects
- Include an opt-out clause if the vendor’s response time or quality of work does not meet agreed-upon standards
- Document your current login credentials and passwords before changing vendors

and offer online educational programs to our members.”

Another reason is service. If your website server or voice mail system goes down on a Saturday morning, will your IT staffer be able to come into the office, diagnose the problem, and fix it before your members start complaining? An outside firm may be able to resolve the issue as part of a 24/7/365 service plan.

Improved cybersecurity is another potential benefit. Having full-time professionals protecting your network, including installing the latest software patches and releases, can help guard against hackers trying to steal confidential information or ransomware threats that could halt your operations in their tracks.

### Choosing an IT firm

If you’ve decided on outsourcing, a good first step is to prepare a request for proposal that specifies your desired services. (At narealtor.org see RAE’s article on how to write an RFP; search for “Right Vendor, Right Price.”) You can then contact a local IT firm or one of the major national companies, such as Corserva.com, Synoptek.com, or Mindshift.com that specialize in nonprofits.

“We have found it’s a big advantage to hire someone locally,” Valerino says. “All firms have the ability to monitor your system remotely, but if you are adding a new service or onboarding new people, it’s easier to explain things to a person sitting in the room next to you. We also have regular check-in meetings to discuss upcoming projects.”

You should check an IT vendor’s reputation for service, as well as its client base.

Finally, don’t be afraid to ask for advice from other AEs or associations around the country. “Before we make a decision, we reach out to other executives using the system,” King Kinney says. “We ask what they like and don’t like about a vendor. That’s really helped us in making good choices.”

*By Richard Westlund*

# Become a Balanced Leader, Exercise Your Influence

How you can recognize and cultivate intangible skills to be a better AE.

Great CEOs affect the direction and success of organizations. Depending on the method, this skill is often described as leadership or influence.

This is the fifth in our series exploring intangible skills of great CEOs. The 10 intangible skills are actually five pairs that are mirror images and are exhibited differently by each CEO. In this column, I discuss the intangible skill pair of leadership and influence.

## What is the skill of leadership?

CEOs with the skill of leadership give direction and inspire people to willfully follow a course they define.

In sessions I've conducted with search committees seeking a new CEO, leadership is usually the number one desired skill. For the most sophisticated organizations, it is not only desired but essential. It is fundamental to the organization accomplishing its strategic purpose. While there are challenges for the CEO to exercise leadership, it is the skill that can create dramatic change.

The CEO skill of leadership is most obvious in execution. Leaders exercise their skill in a demonstrable way. Most leaders—as well as their followers—understand it is a skill of “push.”

With such a visible skill, the action of the CEO leader is swift. There is no waiting or long contemplation by experienced CEOs in offering direction or suggestions. Positive past experience gives them the comfort of quick action.

## Developing leadership

There are several components to CEO leadership. The most powerful is the ability to set

a quest worthy of pursuit. It must be practical, logical, and a stretch for the organization or staff, but not as far-reaching as a visionary CEO would propose. The leadership CEO is action-oriented and fully committed to accomplishing the goals by involving and motivating everyone in the organization. They are inspirational with a practical bias.

Leadership CEOs have the trait of being truthful, supportive, and ethical. They have earned the trust of elected volunteers, staff, and others involved with the association. As they encourage and motivate, they commu-

Many of the CEOs with influence describe their approach as respecting all participants and listening intently to what is said—and what is not said.

nicate clearly, frequently, and in detail.

Great CEO leaders acquire, organize, and motivate the best possible staff team. They are not threatened by hiring highly competent people in career positions and take great pleasure in others' success. They know how to leverage the success of the employee team—as well as the volunteer leadership team—to accomplish outstanding results.

There is also a measure of passion in leadership CEOs. However, it is passion well grounded in considerable thought about the end result and the timing, assets, and individuals involved.

But how can a CEO be a strong leader in an organization that has elected leaders? I recall in one recruiting session, an association officer said he wanted the new CEO to be a “small L” leader. This officer wanted to make certain the CEO's leadership style

did not diminish the positions of the current president or other officers. This perception is a real challenge for REALTOR® association CEOs.

The ideal situation for the leadership CEO is to have the highest quality volunteers in top positions. “Actively recruit the very best members for key positions. Do that by tackling the big issues, the ones that have real impact in their world. It means taking risk, but it is much less of a problem with industry leaders,” advises Karl Berron, CEO of the Indiana Association of REALTORS®.

The most successful CEOs do not display leadership arrogantly or aggressively. They are intentional leaders. They are focused on moving the organization forward in every possible way. But in this directive approach, they are still more visible than other CEOs.

Leadership does not mean you have all the answers, but that you are willing to ask the tough questions, accept input, and then take a public position. “The CEO leader keeps the board and staff focused to address trends that are anticipated, but in the process is respectful, open, and listens to all opinions to make objective decisions,” says Ryan Conrad, CEO of the Northern Virginia Association of REALTORS®.

## What is the skill of influence?

Influence is the ability to sway others. The influencer does so subtly, without force or



CEOs with the skill of leadership give direction and inspire people to willfully follow a course they define.

coercion.

Influence is a skill that operates quietly. It is a derivative of the ability to know the appropriate direction to take, either as an individual or an association, and is applied in a less dramatic fashion.

Highly successful CEOs with influence can operate in virtually any organization regardless of overall philosophy. This flexibility is attractive to many CEOs with the core skill, and it presents fewer challenges than being at the forefront of an issue.

### Developing influence

Great CEOs with the skill of influence do not seek recognition, but rather the ability to get things done quietly. It is not a public skill.

Influence is more of a “pull” approach than confrontational. Influence CEOs tend to be unemotional and very factual in their presentations and arguments.

Influence CEOs practice their craft on a personal level. Although it can be routed through groups, the very quiet manner in which it is built is not easily transmitted in an open forum or large gathering. Though it takes time, influence accumulates through a series of individuals and, therefore, moves the group in a desired direction.

The drawback to influence is the time and investment necessary to get agreement. However, once completed, the agreements

tend to be more reliable. Remember, the approach is built upon personal relationships and trust. Through the use of single contacts in personal influence, the effective CEO gradually builds consensus within a group.

A collaborative approach allows others to have input, to refine, and to improve the original ideas or concepts. There can even be rejection of an idea, but if presented effectively, the concept can grow organically.

An influential CEO relies on information-based decision-making and logical arguments. They believe decisions made in this manner produce longer-lasting results.

In many ways, the influence CEO takes a longer path. The process needs more input and consideration before opinions are stated. All sides and nuances of the debate must be considered. As Jarrod Grasso, CEO at the New Jersey REALTORS®, says, “You must listen, understand the art of compromise, and have patience.”

In positioning themselves, CEOs think strategically about points to be made. They understand that the argument must be from the viewpoint of the one to be influenced. Influence CEOs appeal to the values and perceptions of the other person while thinking through every point and counterpoint. Also, they are careful to make sure that they are not too far removed from their own viewpoint.

In strategic preparation, the successful CEO researches the individuals targeted for influence. The knowledge collected is then applied to the approach and tactics. The more preparation, the better the potential result.

CEOs of influence like to have informal sessions and unstructured discussions on critical issues or new concepts. They like to be collaborative and inclusive with opinion leaders as they sort out and develop their own position.

Many of the CEOs with influence describe their approach as respecting all participants and listening intently to what is said—and what is not said. Some of them described influence as a process that must be honored before your comments are effective. Even if the discussion becomes intense or heated, influential CEOs remain calm. As Gary Clayton, CEO at the Illinois Association of REALTORS®, says, “Only you can control you.”



**Jerry Matthews'** executive career spans more than 20 years as a REALTOR® state association CEO and more than 12 years as an industry consultant. His consulting practice focuses on facilitating change for executives and organizations. [JerryMatthews.com.]

# Could MLSs Lose Copyright Protection?

U.S. Copyright Office questions creativity in property listing databases.

Real estate agents can be very creative in the written property descriptions entered into their multiple listing services. It's part of their property marketing talent, and it's one of the many elements that makes MLS databases eligible for copyright.

The courts have previously found that phone directories arranged alphabetically are not copyrightable because they are just a collection of facts in alphabetical order with no creative spark. MLS databases, on the other hand, exhibit creativity in how the MLS chooses what content to include, in what order to place the content, and how to categorize it.

MLSs have long relied on compilation copyright registrations to protect their databases against unauthorized use of the listing content by third parties. The scope of protection for those copyright registrations extends to listing photographs and text descriptions when the MLS also owns the listing content. Individual MLS photos, videos, or content may not be covered by the MLS's compilation copyright if subscribers retain their own individual copyright of their listing information.

Fortunately, courts have consistently held that MLS databases can be protected by copyright. For example, in *Montgomery County Association of REALTORS® Inc. v. Realty Photo Master Corp.*, the court found that the Pennsylvania association's database possessed the requisite spark of creativity based on a number of factors,

including MCAR's unique system of abbreviations in organization of the database.

But now, the U.S. Copyright Office is rethinking how MLSs must show that its database qualifies for a copyright registration.

Last summer, the U.S. Copyright Office began questioning MLS applications for copyright. Many MLSs with pending copyright applications received "requests for clarification."

The Copyright Office said in its written notices to the applicants that there was not sufficient proof of creativity in the selection, coordination, or arrangement of their MLS database. MLSs were required to argue their case within 20 days or their application would lapse.

NAR Senior Technology Policy Representative Melanie Wyne and I met with Copyright Office representatives face-to-face in August to discuss MLS applications. We asked for, and the Copyright Office officials agreed to, a grace period during which the Copyright Office would not take any adverse action on pending applications.

The grace period, which is still active and has no specific expiration date, provides NAR and MLSs time to assess the situation and determine the best plan to address it. For example, perhaps describing in the copyright application more specifics of MLS database creativity may be



an option to better position MLSs to receive copyright protection.

## MLSs strategize on what to do next

In October 2017, NAR hosted a workgroup of brokers and MLS representatives to discuss MLS database creativity and brainstorm strategies for protecting listing content. The meeting was particularly helpful in clarifying the large number of creative choices that are behind the MLS database. We brought this information to our discussions with the Copyright Office in March. The meeting was encouraging and fruitful, and we continue to work with the Copyright Office on this issue.

NAR's efforts are focused on working





According to the Copyright Act, the copyrightable interest in an MLS database is in its original “selection, arrangement, and coordination” of the property listing information.

#### Copyright resources

A video about recent actions of the U.S. Copyright Office related to pending MLS database copyright applications, featuring NAR General Counsel Katie Johnson, which aired at the March AE Institute, is available at [nar.realtor](http://nar.realtor).



with the Copyright Office to spotlight the creative choices made by MLSs and develop guidelines to help MLSs show that creativity more clearly in copyright applications.

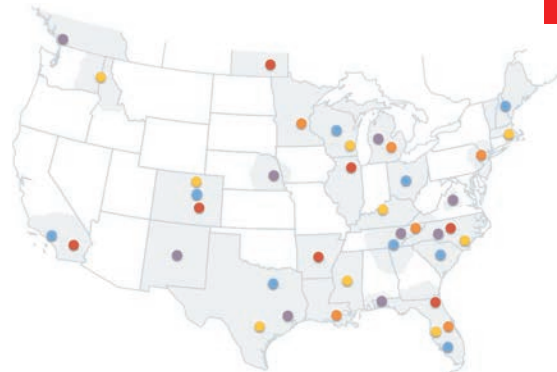
NAR’s basic information on copyrighting an MLS database at [nar.realtor](http://nar.realtor) will be updated once discussions with the Copyright Office are concluded. Watch for additional updates at [nar.realtor/copyright-trademark](http://nar.realtor/copyright-trademark), and feel free to send questions to me at [checht@realtors.org](mailto:checht@realtors.org).



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# Campaigns to Model for Midterm Advocacy Success

Rally member support for candidates who support REALTOR® Party issues.

On Nov. 6 this year, Americans will vote to fill all 435 seats in the United States House of Representatives, 33 of the 100 seats in the U.S. Senate, and countless state and local positions. Ballot initiatives and legislation affecting the real estate market, housing development, property taxes, zoning, and more are up for consideration. No doubt the elections this fall will be a major opportunity for positive change. How is your association making its voice heard?

With training and financial support from the National Association of REALTORS®, associations of any size can make an impact. Here are three case studies in successful campaigns that you can implement in your own backyard to elect candidates who support your positions, defeat ordinances that hamper members' businesses, and ensure that homeowners retain their property rights.

## Association works to seat REALTOR® Champions on town council

A small budget and a small pool of volunteers isn't a barrier to political advocacy. Just take a look the 175-member Telluride Association of REALTORS® in Colorado. Last fall, with four seats on the town council up for grabs, the Telluride association made the most of the opportunity to promote candidates who espoused the values of affordable housing, sustainable growth and development, and economic vitality and vibrancy. TAR conducted a campaign that helped elect three REALTOR® Champions.

"We are so grateful for the support and

guidance from the national association, and ecstatic about the outcome of the election," says Robyn Pale, TAR executive vice president. In October, she and several members of her board conducted a candidate-and-issue forum open to the public that drew record attendance and was broadcast via local radio.

Once TAR had vetted the candidates, the board voted to apply for a grant from the REALTOR® Party to mount an independent expenditure campaign to support all four individuals. (IE campaigns expressly advocate for the election or defeat of a candidate but are made independently of any campaign, candidate, political party, or their agents.)

"We provided [NAR's campaign staff] with our details, and they took it from there," Matthew Hintermeister, the association's RPAC and Government Affairs chair, says.

Telluride Association of REALTORS® in Colorado conducted a campaign in 2017 that helped elect three REALTOR® Champions to the town council.

"The campaign they put together was so well orchestrated and well designed, and rolled out quickly. They really took the time to listen to our feedback and were highly responsive to our requests."

The grant from the REALTOR® Party amounted to about \$3,600 per candidate, funding a campaign called "Telluride Matters" that was composed of three mail pieces, a month of online advertising, full-page ads in the local newspaper, and live GOTV phone calls.

"Telluride has some big housing and zoning challenges on the horizon, and it'll be interesting to see how they play out," Hintermeister said. "Our REALTOR® members and affiliates will certainly be breathing easier knowing that they have some champions on the town council. Ultimately, it will be good for the whole community."

By Tania Lee

## Association ensures re-election of longtime supporter

When Cincinnati Mayor John Cranley faced a tough re-election race in 2017, he knew he could count on the support of the Cincinnati Area Board of REALTORS®, the organization that endorsed and campaigned for him in 2013. "He is a true REALTOR® Champion," says Mark Quarry, CABR's director of government affairs, "often seeking our opinion and involving our organization on key issues facing the city of Cincinnati."

Cranley often heaps praises on the organization and the National Association of REALTORS® for helping him win so decisively in 2013, says Quarry.

The two independent expenditure cam-



With 35 percent of the membership investing in RPAC in 2017, NAR’s ability to support REALTOR® Champions in campaigns at the local, state, and federal levels is stronger than ever.

a call for action to its 8,000 members. The nearly 500 resulting letters got the attention of the City Council. The proposal was pulled from the agenda and returned to the city’s Planning and Zoning Department for further review, followed by discussions between the REALTORS® and council members and city staff.

Within days, SAAR had applied for and received a REALTOR® Party Land Use Initiative Grant, and within about two weeks, the analysis provided by Robinson & Cole, the firm retained by NAR to review land-use legislation, became a key resource as the

city reconsidered the draft ordinance. The process had evolved into a productive collaboration, says Grossman.

“The Robinson & Cole report, citing existing case law protecting signage, clearly substantiated the REALTORS®’ position,” says Suzanne Brown, director of community and government affairs for SAAR. “At the end of the day, we were able to give

the city the information it needed to protect homeownership rights. We received grateful feedback from the city’s own Economic Development Department, which conceded that it hadn’t understood the full impact of the proposed ordinance on local economic growth.”

*By Tania Lee*

paigns that the Cincinnati Area Board, with grant support from NAR, ran in support for Cranley were similar. “We utilized all of the normal steps of the IE—polling, formulate a story and strategy, direct mail, online advertising, and get-out-the-vote calls,” says Quarry. Yet, when compared with the earlier campaign, the 2017 one needed to be more targeted because both candidates on the ballot were Democrats and they were both sitting Cincinnati elected officials. “NAR is so experienced in conducting IEs that they had no problem fine-tuning the overall process to be more specific and dialed-in.”

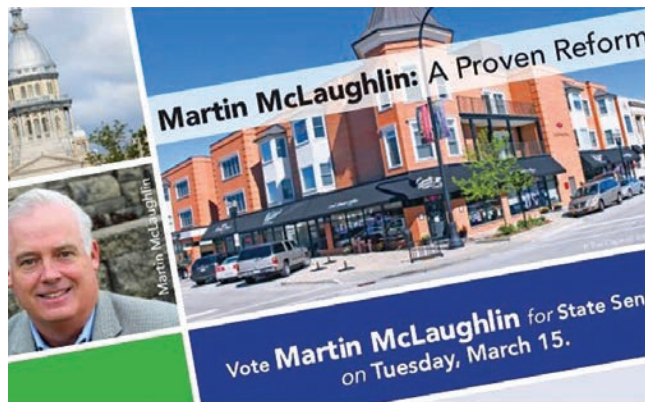
Conventional wisdom is that Cranley is well positioned to next run for a statewide Ohio office, possibly governor, says Quarry. “We’re excited about his next political step because we know that Mayor Cranley understands how important and influential the REALTOR® Party is when it comes to advocating for property rights and issues important to homeowners.”

### Association rallies members to oppose restrictive ordinance

When the city of Scottsdale, Ariz., proposed a restrictive sign ordinance last fall, the Scottsdale Area Association of REALTORS® reacted with a Call for Action that generated nearly 500 letters to City Council members. That got the city’s attention; and with a

Land Use Initiative review provided by the REALTOR® Party, the REALTORS® helped the city see reason.

Scottsdale’s proposed sign ordinance sought to restrict the number of post-and-panel signs at any given property in a calendar year, and it would also have imposed problematic setback requirements for all yard signs. “Here in Scottsdale, where many



Registered voters in parts of Illinois received postcards urging them to vote for Martin McLaughlin Jr. for the Illinois Senate in the March 15 primary election. The postcards were part of a REALTOR® independent expenditure campaign.

of our structures were built right up along the original dirt roads, a 15-foot setback from the curb would put For Sale signs in many people’s living rooms,” explains association CEO Rebecca Grossman.

SAAR requested revisions to the proposal, but the City Council met them only halfway, prompting the association to issue

# Rewards of Today's Mergers

Members benefit as associations vie to expand their size and influence.

Of the 30 REALTOR® association mergers in the past two years, many were prompted by the Core Standards requirements, some by MLS regionalization, and others by market conditions or retiring AEs. Regardless of the motivation, the end result, say AEs, has been better programs and services for members, and the ability to have a greater impact in their communities and on the local legislative process.

"We merged because we had a vision for a much larger and stronger organization that could provide more for its members and could do more in terms of both community service and advocacy," says Mike Valerino, RCE, COO of the 4,000-member Akron Cleveland Association of REALTORS®. "For example, in community service—before, we would volunteer at a homeless shelter, but now we're able to partner with municipalities and organizations to fight homelessness. It's just thinking bigger and scaling up the type of projects that we're able to take on."

The Akron association merged with the Cleveland association in 2013 because its leadership thought this would be best for the members, says Valerino, the former CEO of the Cleveland association. "Although merging had been discussed on and off for 30 years, it was just a matter of finally having the right group of people involved in leadership who were ready, willing, and able to move forward."

When the Kansas City Regional Association of REALTORS® merged with the much smaller St. Joseph Association of

REALTORS® in 2017, it gave their volunteers a larger platform through which to implement their ideas, says Kipp Cooper, KCRAR's CEO. "The advantage of merging with larger boards is, generally, the resources and the professional staff that are on board, and this enables the small-board members to dream bigger."

The St. Joseph Association is now a chapter of KCRAR with its own advisory council and seats on the KCRAR Board of Directors and MLS. "The St. Joe members say, 'Wow, we can do all of these great things now.' They had the vision, but they didn't have the budget or the resources to implement their ideas," says Cooper.

The 2017 merger of the Duluth Area Association of REALTORS® with the Superior Area Association of REALTORS® establishes

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— Kipp Cooper, CEO, Kansas City Regional Association of REALTORS®

a more united and influential group to the public and elected officials, says Maranda DeSanto, RCE, CEO of the merged association, Lake Superior Area REALTORS®. "Now, we're able to consolidate our resources (mostly time) and be more efficient in serving members. The public is also better served by this larger group."

Although the Duluth association had been de facto running the Superior associa-

tion through a shared services relationship for more than 10 years and held joint events, the merged group is now more representative of the region, which spans parts of Minnesota and Wisconsin.

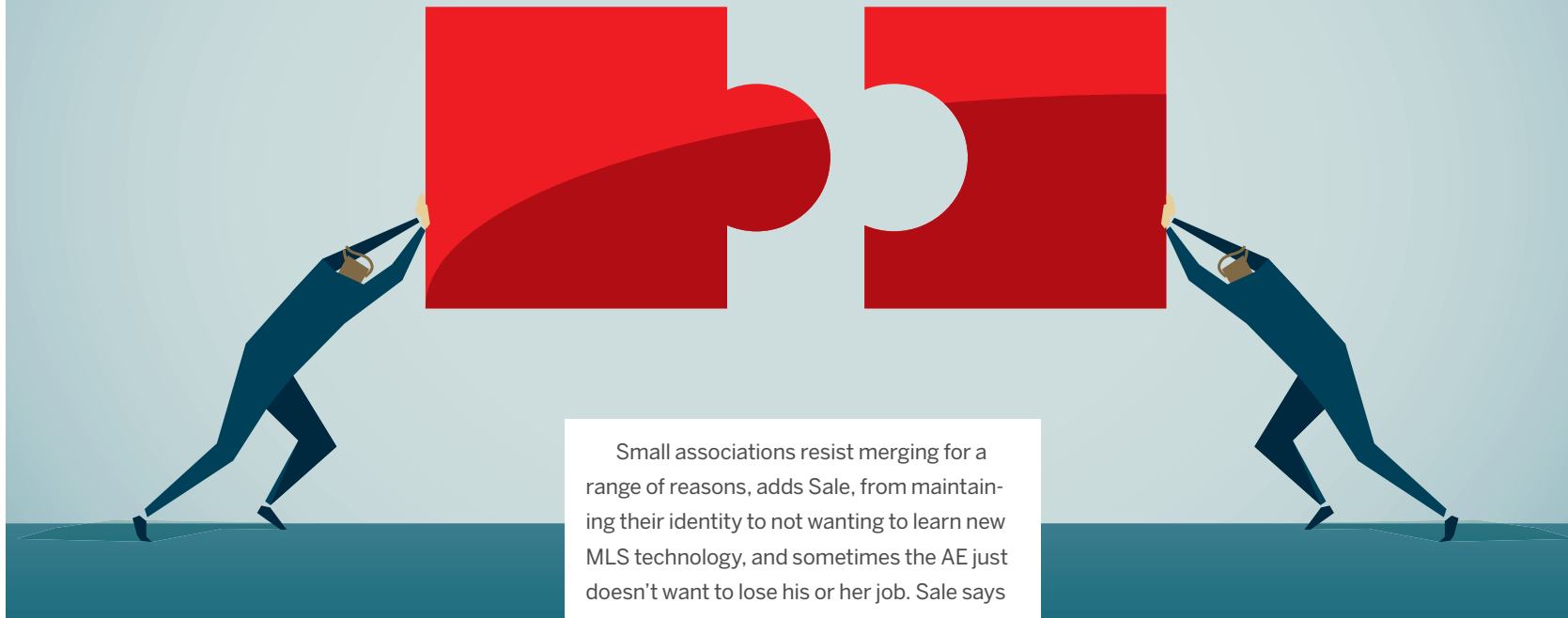
And in Illinois, adopting the 90-member West Central Illinois AOR as a chapter played into the Capital Area REALTORS® long-term vision of expanding the association geographically throughout the central and western part of the state, says CEO Daniel R. Sale, RCE, CAE. Although West Central did not border Capitol Area, Sale and his leadership saw no reason not to merge and hoped the small association between them would also join.

West Central's leadership sought out a merger partner and pitched the idea to every association in the state. Their requirements

included keeping their office and identity as a chapter, retaining oversight of their own government affairs, education, and community involvement, and off-loading Core Standards compliance and administration. The merger with Capitol Area fit the bill and also provides expanded services, professional staff, and more

advanced technology, says Sale.

Leadership at the North East Kansas and the Emporia Boards of REALTORS® were confident that the National Association of REALTORS® wouldn't go through with the Core Standards requirements. Their boards were very small, had no staff, and could not afford to comply with Core Standards. "Many didn't believe charters would actually be revoked [for Core Standards noncompli-



Small associations resist merging for a range of reasons, adds Sale, from maintaining their identity to not wanting to learn new MLS technology, and sometimes the AE just doesn't want to lose his or her job. Sale says his organization took to heart most of the

suggestions for the way their new chapter association would like to continue functioning post-merger. "The fact that they still have a local presence and hold their local events is important to them," he said.

Taking the time to understand what services and benefits are most important to members in the area being merged is essential, says Cooper. "In most associations, we're doing very similar things but the delivery of those things can vary greatly. It's important to build the trust with the other association leadership by listening."

In Kansas, Briden says a merger task force that was representative of all members affected was essential to her smooth mergers. "The members should have a good grasp on the Core Standards requirements and benefits of merging. Educate, share, listen, repeat," she says. "We chose to share the discussions and progress of the merger on a regular basis in the monthly newsletter, and I think that members appreciated the transparency."

Discussing and exploring merger options with an open mind is the first major obstacle, says DeSanto. "I kept telling [the leadership] that when we come to pain points in the discussions, these are just challenges that need to be addressed and overcome; they're not

reasons to scrap the whole process."

From her two-year merger negotiation process, DeSanto offers this advice: Get a facilitator on board early. "When we first started having merger discussions, the leaders believed the whole process was going to be so easy that they didn't need a facilitator," she says. Nine months later, talks fell apart. "A facilitator can ensure that the leaders are asking the questions that need to be asked, and they can keep things under control, the emotions, and the back and forth."

Despite the initial struggle, DeSanto anticipates more mergers in her future. "I've always had a point of view that I'm happy to have the merger conversation and see where it might go if it made sense for our memberships."

Cooper, too, has his sights on merging again. "Mergers can happen anywhere, and technology enables us to do it," he says, noting that his association territory now covers 26 counties in two states. "There are a number of boards that we're in contact with, and I think there is more merger potential on the MLS side."

The theme that Cooper says he keeps hammering home is: We are stronger together.

*By Carolyn Schwaar*

ance], but as the deadline got closer, it was evident that it was going to be a reality," says Linda Briden, CEO of Sunflower Association of REALTORS®, Kan., formerly the Topeka Area Association of REALTORS® before it merged with the two smaller, neighboring boards. "The merger helped some members from the smaller boards see the bigger picture of how advocacy, RPAC, and all the areas required by Core Standards really do benefit them."

### **Mergers are never easy**

With all the benefits of mergers, it may seem that the process is quick and easy, but that's often not the case, these AEs say.

"There's always concern in a merger that a group will lose its identity and get swallowed up," says Valerino. The Cleveland and Akron organizations were each more than 100 years old and had long-standing traditions. "It's important to honor the identity of both associations, so when we have our inaugural we list all of the past presidents from both organizations. We do a lot of things like this to honor the past," says Valerino, "but when we merged we also created something new, and our members and leadership are very excited about going forward with something new."

# Effectively Wielding the Personal Touch

Dale Zahn's actions and outreach elicit member participation.

There's perhaps no better AE to feature in an issue about being personal than Dale Zahn, CEO of the West Michigan Lakeshore Association of REALTORS®, Mich. In his 27 years as an AE, this former REALTOR®, broadcaster, race-track announcer, publicist, journalist, and public speaker has cultivated an authenticity that resonates with everyone he meets. He truly cares about his members as individuals, he gives back to his community, and he values the service his elected leaders give to the association.



"I feel very fortunate to work with a leadership team that 'gets it,' and is supportive and forward thinking," says Dale Zahn pictured here at WMLAR's REALTOR® Memorial with the association's "outreachmobile."

The results of Zahn's personal approach are evident in the dedication he inspires among his members and the robust community volunteer program, enthusiastic advocacy participation, and record-setting RPAC investments.

Association programs, such as the Veteran's Scholarship, which provides free licensing courses and first-year association membership to servicemen and women, reflect his personal patriotism. The association's REALTOR® Memorial park on the grounds of the headquarters building, which features the names, etched in granite, of individuals who were dues-paying members

at the time of their death, shows Zahn's gratitude to each member's service. And the latest member benefit, a safety app called Forewarn, is available free of charge to every member "because their safety and well-being is of paramount importance," Zahn says.

## Champion of the personal and professional

Among the causes Zahn is known to promote, professionalism ranks high on the list. "I believe in the Code and what it stands for," says Zahn. "I believe in encouraging the filing of complaints, or 'business as usual' will continue."

Zahn developed a class called "Professional Courtesies: How Do You Want To Be Remembered?" "This course is about what a person does and how it affects their reputation for years to come—in other words, how they are remembered by peers and the public alike," he says. Hundreds of REALTORS® and AEs in Michigan have taken the course and Zahn has presented it to audiences in three states and at the 2017 REALTORS® Conference & Expo.

Zahn's personal approach to relationship building extends to organizations outside of real estate as well. He builds effective collaborations by personally reaching out and opening pathways to dialogue. "Our relationship with county health departments has resulted in publications for home seekers explaining well and septic systems, and the collaboration resulted in awards from the Michigan Environmental Health Association," says Zahn. "We showed how REALTORS® and counties can hold hands for the good of public health and well-being."

With persistence, one-on-one outreach, and by personal example, Zahn stokes a strong culture of RPAC investment among his association leaders and members, who

are rank first in the nation in terms of participation at 75 percent.

## Modeling personal behavior members can follow

At WMLAR, "RPAC is everywhere," says Zahn. "The word I use when asked how we do it is 'relentless.' It starts with new members during orientation and it isn't uncommon to get 70 percent or more from each new class to invest in RPAC."

Zahn is a Golden R, President's Circle member, and Hall of Fame Investor. "As CEO, I'd never expect members to invest if I personally did not," he says.

Personal and public recognition is also key to boosting RPAC investment, says Zahn. RPAC major investors are acknowledged by name and level of investment at general membership meetings and major investors have red, white, and blue ribbons attached to their name tags. "We reach out to the top producers individually by way of personal phone calls, emails, and visits to their offices," says Zahn. The association even takes out full-page ads in local newspapers to feature photographs of major investors and lists all investors at each level.

WMLAR's response rate to Calls for Action is very high and its Government Affairs committee is large, active, and enthusiastic. The committee makes a point to visit member offices in person to talk about issues and candidates. This year, WMLAR plans to livestream its candidate interviews for state and federal congressional representatives.

"As CEO, I like to wear the REALTOR® R pin with the American flag on it because it says something about who we are and what we stand for," says Zahn, a Bud Smith Leadership Society inductee. His personal dedication and accomplishments speaks volumes about what he stands for.



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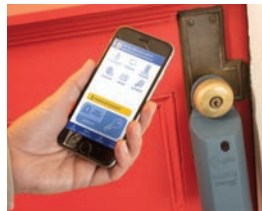
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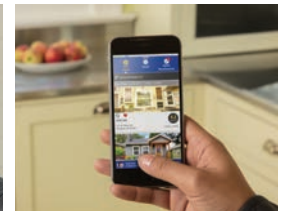
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