How to deliver practical, engaging, and lifesaving Safety Education

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The RAE editorial board reviews each issue and provides critical feedback, proposes story ideas, and stays in touch with fellow AEs nationwide to scout out new programs and products to share with the AE community. To join the editorial board, write an article, or contribute information, e-mail Carolyn Schwaar, cschwaar@realtors.org.
Safety Is Every Association’s Job

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

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

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

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

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

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

We need to encourage our members to talk with their managers and make sure there is an officewide safety plan, not just a personal one. We all know office dynamics vary from broker to broker. In one brokerage office, it may be easy to institute new rules regarding meeting new clients and logging identification. In another, members may hit red tape if they try to change office procedures too much. So what are we to do? I think the answer lies in our individual members. We need to foster an environment that allows for members to help and support one another, especially when they ask to make changes for the better.

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

An example of associations taking the lead in member safety education: The Mainstreet Organization of REALTORS®, Ill., recently launched a member safety video series to complement its safety class offerings and safety information online. [youtube.com/watch?v=O9d9mNYS900]
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Associations Boost Members’ Focus on Safety
NAR, states, and locals increase training, education, and awareness.

NAR launched REALTOR® Safety Month in 2003 and expanded it to a year-round program and service initiative in 2009.

In 2015, NAR President Chris Polychron will make safety a paramount focus of the organization with a variety of new resources for members and associations.

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

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

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

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

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

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

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

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

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

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

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

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

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

The new structure gives state associations greater flexibility in how they meet their goals, says RPAC Fundraising Managing Director Brooke Roth. State associations have the freedom to decide when they send their hard- and soft-dollar investments to NAR to meet their fundraising goal. “By working together to raise more money at all levels of the organization, state and local associations, and now MLSs too, will be able to continue to be the best voice for real estate in their states and communities.”

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

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

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

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

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

Small Changes Make Big Impact on RPAC Fundraising

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

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

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

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

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

Campaign Success, Out of the Gate

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

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

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

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

Access updated documents at realtor.org.

New Toolkit Addresses Relationship Building Between AEs and Large Brokers

A collection of best practices and examples from AEs and large brokers on how they develop and maintain healthy relationships with each other is available on realtor.org. The toolkit is the work of a 2014 AEC work group that solicited input from AEs and brokerages around the country. The resource will be evergreen, welcoming AEs and brokers to submit comments and tips to curator Courtney Wilson (cwilson@realtors.org). Visit realtor.org/ae/manage-your-association/association-and-large-broker-relationships.

Pennsylvania Associations Merge

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

Atlanta Commercial Board Kicks Off Diversity Initiative

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

Florida Road Rally For RPAC

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

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

1. Watch NAR’s Window to the Law video for legal tips and best practices to consider when implementing safety programs and policies.

2. Discuss safety at your new member orientation. Whether you discuss developing personal safety protocols, show videos or share articles, safety should always be on the agenda.

3. Host a safety seminar. Invite local safety experts to share their knowledge on how your members can stay safe or refer to the growing list of safety presenters available under Resources for REALTORS®.

4. Embrace technology. Post safety information on your social media accounts. Write articles for your e-newsletters. Share the safety widget and a banner on your website. Don’t let your members forget the importance of personal safety.

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

These 34 REALTOR® association executives earned their RCE (Realtor® association Certified Executive) designation after an extensive course of study and exam in November. RCE is the only designation created specifically for REALTOR® association executives. It exemplifies goal-oriented AEs with drive, experience, and commitment to professional growth. Candidates earn the designation by accumulating points through experience, education, and a comprehensive written exam. For more information on getting started toward your RCE, visit realtor.org/rce.

Wyndi Austin, RCE, Southeast Valley Regional Association of REALTORS®, Ariz.
Karen Becker, RCE, Southeast Minnesota Association of REALTORS®, Minn.
Gavin Blair, RCE, Dayton Area Board of REALTORS®, Ohio
Susan Blumhoefer, RCE, West Central Association of REALTORS®, Minn.
Byron Bogaard, RCE, Central Valley Association of REALTORS®, Calif.
Sharon Carlson, RCE, Quad City Association of REALTORS®, Iowa

Joseph Croce, RCE, Southside Virginia Association of REALTORS®, Va.
Pamela Croke, RCE, Bucks County Association of REALTORS®, Pa.
Tonya Deskins, RCE, Southeast Valley Regional Association of REALTORS®, Ariz.
Wendy DiVecchio, RCE, Greater Las Vegas Association of REALTORS®, Nev.
Brian Doherty, RCE, Northeast Association of REALTORS®, Mass.
Amanda Sue Eberson, RCE, Scottsdale Area Association of REALTORS®, Ariz.

Angela Emerson, RCE, Sussex County Association of REALTORS®, Del.
Cindi Ferguson, RCE, Wichita Area Association of REALTORS®, Kan.
Janet Gallagher, RCE, Greater Fort Lauderdale REALTOR® Association, Fla.
Laura Halverson, RCE, Tri-Counties Association of REALTORS®, Calif.
Bob Hart, RCE, Santa Barbara Association of REALTORS®, Calif.
Myron Larimer, RCE, Greater South Bend-Mishawaka Association of REALTORS®, Ind.

Mona LeBlu, RCE, Kerrville Board of REALTORS®, Texas
Miguel Legarreta, RCE, Ada County Association of REALTORS®, Idaho
Mary Leidy, RCE, Calumet County Association of REALTORS®, Ill.
Ann Londrigan, RCE, CAE, Illinois Association of REALTORS®, Ill.
Cliff Long, RCE, Birmingham Area Association of REALTORS®, Ala.
Margaret Lynch, RCE, Richmond Association of REALTORS®, Va.

Dennis MacDonald, RCE, REALTORS® Association of the Palm Beaches, Fla.
Jean Maday, RCE, National Association of REALTORS®, Ill.
Joseph McClary, RCE, CAE, Kentucky Association of REALTORS®, Ky.
Kim McCoy, RCE, Mainstreet Organization of REALTORS®, Ill.
Paul McLaughlin, RCE, CAE, Iowa Association of REALTORS®, Iowa
Amy Ritsko-Warren, RCE, Greater Capital Area Association of REALTORS®, Md.

Cheryl Smith, RCE, Waterloo-Cedar Falls Board of REALTORS®, Iowa
Shelley Specchio, RCE, Northern Nevada Regional MLS Inc., NV
Deborah Allen Talley, RCE, CAE, Richmond Association of REALTORS®, Va.
Kimberly Wiggins, RCE, Northeast Florida Association of REALTORS®, Fla.

RCE at AEI

Earn points toward your RCE by attending the annual RCE nuts-and-bolts workshop at the AE Institute in Vancouver where you’ll learn about the RCE designation process and walk through the applicant data form.
Keep your members on the cutting edge of technology!

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

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

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

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

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

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

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

“When safety is not top of mind, or you’re not hearing about situations like Beverly Carter’s, it’s easy to get lax,” says Laura Crowther, Coastal Carolinas CEO. Crowther vows to keep safety a prominent focus year-round.

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

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

**Where do I find the right instructors?**

Even a small association should be able to find local experts in law enforcement who can share their knowledge and provide hands-on training. Because law enforcement personnel usually do not charge for their time, they are a natural first choice. Ask law enforcement agencies for referrals and recommendations. Vet instructors and make sure they have professional liability insurance. Make sure the instructor understands the types of situations your members are likely to encounter and is willing to customize classes for REALTORS®.
What type of safety class should I offer?
There’s no single format or curriculum for safety training. In fact, by offering classes on hands-on self-defense, handgun safety, nonlethal weapons, danger avoidance, and technology tools, you can expose members to a range of techniques and information so they can choose what works best for them. Not everyone wants to carry a gun, for example. Poll members to gauge their interest in specific types of training.

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

Which members are likely to attend?
Most association executives report that the majority of attendees for safety classes are women, yet both men and women are interested in safety classes. For hands-on training, consider offering some gender-specific classes since different self-defense techniques may be appropriate for men and women. If you offer a women’s class, be sure to offer a men’s class, as well. “Men don’t feel as comfortable [participating in the classes], but everyone can benefit from them,” says Mark Epstein, CEO of Citrus Valley Association of REALTORS®, Calif. Gender-specific training may encourage more men to take part, he says. Also, expect a large turnout, AEs say. And expect demand for multiple classes. Ostermiller offers as many as five or six classes each year.

What’s the best way to attract members?
Consider offering training that leads to certification for concealed-weapons permits, which are now legal in all 50 states. Relaxed requirements for these permits, along with increased perception of risk, have boosted the demand for certification. Amanda Woods, association executive of the Northwest Mississippi Association of REALTORS®, notes that her association’s class led to an estimated 25 to 30 members becoming certified to carry weapons. And once members begin carrying weapons, they often recognize the need for further, regular training in handling those weapons—so expect to add classes on that subject.

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

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

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

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

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

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

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

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

From employee policies to insurance plans, backup-systems to emergency response teams, your toolkit for crisis needs to be ready at all times. Consider these 12 events below and determine how prepared your are to effectively manage them.
CONTAGION
The Ebola scare in the United States jolted the nation into wondering what would happen if a contagious disease got out of control. This doesn’t mean you should sit down with your board and discuss Ebola protocol. But consider how the association might operate if employees could not travel to the office. (Even a bad flu could take down your whole staff at once.) How might key services operate? Consider crafting an emergency shared services agreement with a neighboring association.

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

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

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

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

Lawsuits against REALTOR® associations in 2014

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

MEMBERSHIP DROP

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

SCANDAL

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

CELEBRITY

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

TERRORISM

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

NATURAL DISASTER

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

YOUR DEMISE

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

THE UNEXPECTED

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

RESOURCES

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

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

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

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

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

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

(7) Search the REALTOR® Association Resource Exchange (realtor.org/rare.nsf) for “Crisis Management Plan.”


(9) NAR is developing a model Crisis Communication Plan for associations to use in the event of a tragic incident. Look for the announcement in the INS soon.
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Even when you take the right steps and do the right things, you can still have a crisis on your hands. How you react and communicate to the media, members, employees, and the public will determine how well your association recovers.

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

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

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

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

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

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

...competently deal with any other crisis that may arise.

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

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

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

**Case study in crisis communications**

The Scottsdale Area Association of REALTORS® had a crisis in 2013 that served as a learning experience for its team. The association, through its political action committee “Quality of Life Matters,” with financial support from a National Association of REALTORS®,...
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independent expenditure grant, campaigned in favor of asking voters to approve up to $212.1 million in bonds that would pay for 39 public projects and result in a slight property tax increase.

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

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

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

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

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

**Crisis aftermath**

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

Don’t let a real crisis force you develop a crisis communications plan. Act now.
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Eye-opening Strategic Planning

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

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

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

“I took over as AE about three years ago, and although we had a strategic plan committee and it met once in that time, I couldn’t find a plan anywhere,” says Kathy Matlock, EVP of the 262-member Big Bear Association of REALTORS®, Calif. Prompted by the Core Standards obligation, Matlock hired a facilitator in November to lead her committee through the strategic plan development process.

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

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

“The thought process we went through to get to a final product was educational and eye-opening,” says Holly Callanan, the association’s AE. “It helped me bring important issues to the attention of the directors, and this, in turn, will help me accomplish the goals I have set to meet the Core Standards requirements.”

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

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

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

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

The planning session facilitator kept discussions lively by switching groups around so members were always hearing a
new voice or opinion. “The members were so focused on getting this right and working together that they didn’t want to leave for lunch,” she said.

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

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

Reinvigorating the retreat
The 360-member Bismarck Mandan Board of REALTORS® in North Dakota has held an annual planning meeting for many years. But at the board's recent meeting, the Core Standards requirement gave it a new energy, says AE Nancy Deichert. “Participants were excited to see something other than usual to-do list come out of the retreat. It was motivating to see the group brainstorm new ideas and to hear them talk positively about some of the things we are already doing,” she says.

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

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

FAQs: Required Strategic Plans

Q. What financial and other resources are available from NAR to facilitate development of strategic plans?
A. Grants at a minimum of $2,500 and a maximum of $5,000 are available to associations to develop a strategic plan, or to enhance an existing strategic plan. Grants are disbursed after the strategic plan has been completed, and submitted to and approved by NAR. Grants are based on the number of primary REALTOR® members at $10 per member. Secondary members (those who hold their primary REALTOR® membership in another association) cannot be included in this calculation. Grants are available for strategic plans created or enhanced between May 17, 2014, and June 30, 2015.

Q. What can we use the strategic planning grant for?
A. Strategic planning grants—which will be disbursed after a strategic plan has been completed, and has been submitted to and approved by NAR—can be used for any purpose the association deems appropriate including facilitator fees, meetings and facilities, administrative expenses, travel expenses, and so on.

Q. Must an NAR-qualified facilitator be used for an association to be eligible for a strategic planning grant?
A. The primary purpose of the strategic planning grant program is to ensure associations have access to qualified facilitators. Consequently, associations with five hundred (500) or fewer members must use an NAR-qualified facilitator to be eligible for a strategic planning grant. Associations with more than five hundred members do not have to use an NAR-qualified facilitator to be eligible for a strategic planning grant.

Q. What must the strategic plan include to meet the Core Standards?
A. Strategic plans must satisfactorily address the Advocacy and Consumer Outreach components of the Core Standards to qualify.

Q. Do the Standards require us to make these plans available to the state association?
A. No. Strategic and/or business plans will be reviewed at the national level only, and not made available to state associations or to any other association in your state.
Keep Your Safety Program Legal

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

Brokers and REALTOR® associations across the country are implementing new and updated safety procedures to ensure that their sales teams, staff, and members stay as safe as possible. As AEs and others in the industry work to strengthen safety practices and give advice to members, keep in mind these considerations to avoid potential exposure to litigation or other legal hassles:

**Weapons in the Office**

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

Also, keep in mind that the choice to arm oneself is personal. Carrying any weapon may be contradictory to an individual’s religious or personal beliefs, or may simply be outside of his or her acceptable zone of comfort. Therefore, avoid establishing any policy that would require anyone to carry a weapon. Similarly, offering any monetary or other incentives to carry a weapon should be avoided.

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

**Safety Presentations**

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

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

**Safety Products and Vendors**

Associations may also wish to bring certain safety devices or products to the attention of their members. When doing so, AEs should consider vetting any products or vendors for reliability, legitimacy, and safety. Official “endorsements” by associations may present legal pitfalls if these products later prove to be unreliable or otherwise faulty. In presenting any safety product options, associations should consider including a disclaimer that it does...
not endorse the products and should work with local counsel to draft appropriate disclaimer language. In no case should any safety product be branded with any REALTOR® or REALTOR® association trademark.

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

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

Safety at Conventions
Although the industry has been particularly focused on real estate agent safety during showings or open houses, association staff and members may also find themselves in vulnerable situations when attending conferences and conventions. The combination of unfamiliar surroundings, large groups of strangers, disrupted patterns, and, in some cases, social gatherings involving the consumption of alcohol may create potentially dangerous circumstances for attendees. Prior to any conference or similar event, AEs should consider reviewing association policies and practical safety measures with any staff that will be attending. NAR offers resources on realtor.org/safety geared specifically toward ensuring attendee safety at conferences and conventions.

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

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

Jessica Edgerton is an associate counsel at the National Association of REALTORS®. Contact her at 312-329-8373 or jedgerton@realtors.org.
The 2015 AE Institute in Vancouver marks the once-every-five-year joint meeting of Canadian and American REALTOR® association executives. Although real estate practice is slightly different in Canada, AEs on both sides of the border face many of the same challenges when it comes to providing value to members, says Rob Philipp, CEO of the 2,800-member Fraser Valley Real Estate Board, located just east of Vancouver, Canada.

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

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

Q. Prior to your current position, you were a business strategist at Price WaterhouseCoopers, consulting with corporate CEOs. What corporate management best practices were you able to implement at your board?
A: Regardless of where I work, the key element for me is to build and develop a great team. With 45 employees, it comes down to taking the time to understand diverse people and their needs and skills and matching that with the needs of the organization. We foster a culture of excellence, innovation, and caring, although we have had to make difficult decisions as well—and we don’t hesitate to make them; delay is bad for everyone.

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

Q. Your association recently reported that Fraser Valley’s real estate market returned to normal in 2014. What does this mean for the association and its programs and services?
A: Yes, 2014 was a good year for us, and we’ve been fortunate that in Canada we did not see as dramatic a drop in sales as you saw in the United States. Therefore, our recovery has been much quicker. In fact, through the downturn we continued to provide key services and programs to members and didn’t need to lay off any staff, but we did trim our budgets. Our members recognize and appreciate exceptional service and are willing to pay for it when they see value. Membership numbers have been stable over the past few years, and we anticipate that will continue.

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

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