

REALTOR® AE

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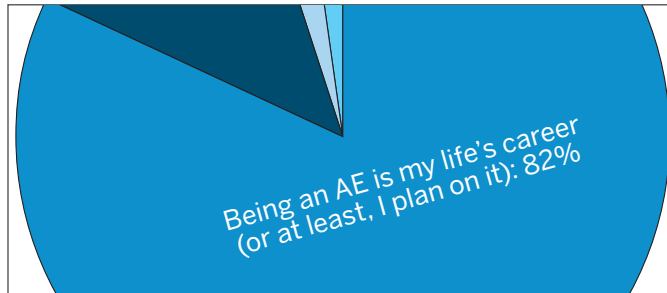
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The RAE editorial board reviews each issue and provides critical feedback, proposes story ideas, and stays in touch with fellow AEs nationwide to scout out new programs and products to share with the AE community. To join the editorial board, write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

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Tools to Grow Your Career in 2016



Marc Lebowitz, RCE, CAE,
CEO, Tucson Association of
REALTORS®, 2016 chair of
the AE Committee

My favorite day of the year is Dec. 20, marking the winter solstice and the shortest day of the year. From this day to the first day of summer, the days grow longer. For me, this day signals the start of the return of spring, a time of rebirth and renewal.

This is a great time to begin making plans for a successful year. My keys to success have always included professional development using NAR resources to enhance my knowledge and skills.

In my role on the AE Committee, I am privileged three times a year to have conversations with new AEs. From these discussions, I have recommended that as an organization we dedicate more time over an extended period helping new AEs get up to speed. To that end, one of our AEC 2016 initiatives is to “build out” the new AE on-boarding process into a yearlong event with opportu-

nities for continual mentoring.

Earning the REALTOR® association Certified Executive designation (RCE) is another key to AE career success. While there is no “time in position” requirement in pursuing the RCE designation, amassing the points required on the applicant data form may take up to two years. All RCE candidates must complete one of two Association Management online self-study courses, which offer information vital to understanding our roles. These online courses are so informative that I require my entire staff to complete at least one . . . and this can be a humbling experience. The first time I took the MLS section quiz, I scored very low. So much for being the sharpest knife in the drawer.

The full body of knowledge required to be

an exceptional AE resides on realtor.org. The depth and density of the material is a blessing

The separate CEO track—a day-and-a-half program—at the 2016 Association Executive Institute in March was so well received that it sold out in one day.

and a curse, as NAR adds a huge amount of new information each year. However, remaining current on realtor.org resources is a key component of a good professional development strategy.

Many experienced AEs have expressed a desire for advanced training in the form of a separate CEO track at the Association Executive Institute, and I am excited that we will be rolling this out in San Antonio this March. The additional day-and-a-half-program was so well received that it sold out in one day.

Many state associations, including my home state of Arizona, offer structured support for local AEs, another key to success. This includes state AE Councils, state and regional AE training, and, in some cases, a dedicated staff person to work closely with local AEs. A classic example of how our state associations support what we do was highlighted in 2015 with Core Standards. With the leadership assistance of our state associations we not only succeeded, we excelled.

At the risk of mixing too many metaphors, AE career development and planning is a rich cookbook of recipes, depending on your individual list of ingredients (association resources) and the “tools” in your kitchen (AE skill set). Like Gordon Ramsey on “Top Chef,” the AEC is here to help you perfect the recipe for your professional success.



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Local Associations On Board for Boys & Girls Clubs of America Initiative

Following the lead of the National Association of REALTORS®, local associations are focusing their charity efforts on the Boys & Girls Clubs of America in 2016. NAR announced its collaboration with the youth development organization during the 2015 REALTORS® Conference & Expo in November in San Diego and plans to organize a yearlong push for local involvement.

“BGCA has been close to my heart for many years, and as I begin my NAR presidential term, I am very excited that REALTORS® will be partnering with their local clubs and offering their time and resources to make a difference in the lives of their communities’ children,” said NAR President Tom Salomone, broker-owner of Real Estate II Inc. in Coral Springs, Fla. “Every REALTOR® knows building strong communities is an important part of the job, and working with BGCA allows us to contribute meaningfully to the lives of children in the neighborhoods we help to create.”

In December, the South Metro Denver REALTOR® Association dropped off nearly \$7,000 worth of toys at the Boys & Girls Clubs of Metro Denver (pictured below). Association members donated the funds and association staff and volunteers bought the toys. It was the association’s first time working with the local BGCA.

Some local REALTOR® associations have partnered with BGCA for years. The Amarillo Association of REALTORS® in Texas has organized a “Cookies With Santa” event for a local elementary school for the past six years. “The kids come to our office to play games,



work on crafts, eat pizza and cookies, and visit with Santa, who also gives them a small gift,” says Denise Price. “I just love seeing the excitement on the children’s faces when Santa walks in to the room. It’s also our staff’s favorite

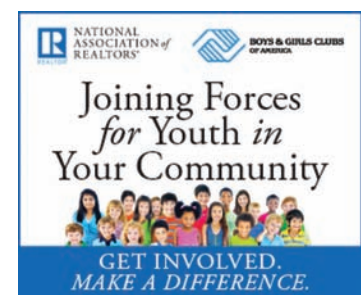
event. Seeing the dedication of the club staff has such an impact on me. They truly love their job and the children they care for.”

Every local Boys & Girls Club has specific needs, so associations and their members can work with their local club to determine the best way to volunteer and offer resources to have the greatest effect. Activities could include planning a cleanup day for the club, sponsoring a holiday-themed party, and offering tutoring assistance or hosting a career day for teenagers. Associations participating in the BGCA partnership may be able to meet either their community involvement or community investment requirements under NAR’s Organizational Alignment/Core Standards policy.

“My association partners with our local Dollar Tree store to collect donations to be used to make Easter baskets for five local clubs,” says Beth Tutwiler-McGuire, AE of the Morgan County Association of REALTORS®, Ala. In 2015, the association collected enough items to make 300 baskets and deliver them to the clubs. “Seeing the joy on the kids’ faces really makes our day,” she says.

Members, too, are encouraged to get involved with their local BGCA on their own. Opportunities include coaching the sports league, volunteering as an after-school tutor, and even hosting a career day for teens and their parents who may be interested in being a REALTOR® one day.

NAR has created an easy-to-follow tool kit for associations, members, and consumers on how to get involved with their local BGCA at realtor.org/BGCA. For associations, NAR offers materials to promote member involvement, including ready-to-download web ads (pictured right) and banners, press releases, videos, and photos.



Successful Programs

Public Outreach: Community Investment



The **Minneapolis Area Association of REALTORS®** not only donated \$10,000 to build a local playground this past fall, but 17 member volunteers also donated time and energy to the construction. "We're giving back," said Dave Philp, president of the MAAR Foundation. "Where parks start is where communities start, so we're going to have families playing out here for years to come."

Public Outreach: Community Investment

Helping the people of Flint, Mich., during their water crisis is the first initiative of the newly established Michigan Realtors® Relief Fund. "Many local associations in Michigan asked us what they could do to help the people of Flint," says Joe Krass, communication director at the Michigan Association of REALTORS®. The association's Board of Directors approved \$10,000 toward relief efforts. "We will be working cooperatively with leadership at the East Central Association of REALTORS®, Mich., as well as state and local government officials, to best identify the most effective use of donations." Contribute at mirealtors.com/relief-fund.



New Online COE Course With CE Credit

The National Association of REALTORS® launched a new online REALTOR® Code of Ethics training course that qualifies for continuing education credits in select states. This new online course, which costs \$29.95 with volume discounts available, offers a highly engaging and interactive experience.



An enhanced, free non-CE course option will also be available at the Center for REALTOR® Development in the first quarter of this year. This version includes customized electives to create training based on a student's interests. It also offers specialized content available for commercial, appraisal, and residential practitioners.

All REALTORS® are required to complete

ethics training within designated training cycles. Training must be no less than 2 hours and 30 minutes of instructional time in a four-year cycle. The deadline for the current training cycle is Dec. 31, 2016.

The new CE course is one of several planned enhancements to NAR's online ethics training offerings—all of which meet specific and rigorous criteria—through which REALTORS® may meet their membership training obligations.

For more on the REALTOR® Code of Ethics training, visit realtor.org/code-of-ethics/training. Additional resources are available on realtor.org to help association executives administer and implement the REALTORS® Code of Ethics Training requirement. The Code of Ethics Training Toolkit for AEs includes sample promotional materials from REALTOR® associations; details and FAQs on administration and enforcement of the requirement; and background material on the history and rationale.

Customize NAR's New "Get Realtor®" Ad Campaign Materials to Your Local Market

NAR launched the new Get REALTOR® advertising campaign in February, showcasing REALTOR® brand value to consumers.

The campaign aims to illustrate the knowledge gap between what today's hyper-connected consumer might think they know about buying or selling a home, and how a Realtor® can help them succeed. In other words, consumers need to "Get Realtor®."

The campaign materials emphasize online and social engagement with sharable content, video, and digital banners, but also include traditional media such as print ads, radio ads, and media content partnerships.

NAR will track changes in consumer

sentiments and intention to use a REALTOR® every 6 months to measure campaign effectiveness.

Associations can customize the print and digital materials and use them in local markets by accessing the online ad generator at realtor.org. Although members cannot customize the materials, they are encouraged to share them online and use the digital, video, print, and radio creative without alteration.

To learn about the strategy and research behind the campaign, visit realtor.org/consumer-advertising-campaign. An FAQ for AEs is available at realtor.org/articles/get-realtor-faqs-for-aes.



Association Name-change Trend Continues

More often lately, REALTOR® associations are dropping the “association of” from their names. From Louisiana REALTORS® to Chicago REALTORS®, these new brand names are part of a repositioning trend. The idea is to move associations away from being perceived as a governing body that provides services to REALTORS® and toward recognition as a group of professionals that represents the interests of REALTORS® and home owners in the community.



“We felt that ‘Georgia Association of REALTORS®’ was a ‘thing’ and that ‘Georgia REALTORS®’ are people,” explains Brandie Miner, the association’s communications director. “It’s just a different direction in how we wanted to present ourselves.”

The Columbus Association of REALTORS®, Ohio, rebranded itself a few years ago as Columbus REALTORS®, which is also the name of its redesigned publication and website.



“We know our members and the public will shorten Columbus Board of REALTORS® and we didn’t want to brand an acronym,” says Marque Bressler, the association’s communications director. “Many already refer to us as Columbus REALTORS®.”

Ever since the Hawaii Island Board of REALTORS® changed to Hawaii Island REALTORS®, consumers call thinking it’s a real estate office, says association Executive Officer Kehaulani Costa. “We have to

expressly say ‘we are the board,’ or ‘we are the association of.’ ”

Regardless of the reason for the name change, “it’s important that each association get the affirmative permission and license from NAR prior to making such name change,” says NAR General Counsel Katie Johnson. “Some are not aware of that obligation.”

Any REALTOR® association can change its name or establish a DBA (“doing business as”) if approved by the National Association of REALTORS® and properly registered with its secretary of state office, according to the renaming guidelines.

Removing “association of” or “board of” aren’t the only rebranding options. Associations can use any DBA as long as it includes the term REALTOR® or REALTORS®, uses the trademark, and does not reflect adversely on the REALTOR® organization, such as a name implying that membership is somehow restricted by race or religious beliefs. If an association chooses to use a geographical name, it must describe the current actual service area of the association with a reasonable degree of accuracy and must not be too similar to any other association’s name.

Association names, including nongeographic names, also must convey the idea of an organization of members who have joined

together to promote the professionalism of real estate practitioners in the community.

In May 2015, the hearing panels of the Membership Policy and Board Jurisdiction Committee rejected a few proposed association names because they were misleading, says Katie Hunter, NAR’s manager of membership and association jurisdiction.

For answers to your name change questions, contact Hunter at khunter@realtors.org.



Hatton Named AE Leader of Tomorrow

Theresa Hatton, RCE, executive director of the 800-member Greenwich Association of REALTORS® in Connecticut, received the National Association of REALTORS® Leaders of Tomorrow Young Professionals Award in November at the 2015 REALTORS® Conference & Expo in San Diego. The award recognizes younger AEs who have fostered greater involvement and increased professionalism among their peers and REALTOR® members.

Hatton currently serves on the executive committee of the Connecticut Association of REALTORS® and is chair of the NAR Association Executive Institute Advisory Board. She is also a member of the REALTOR® University Curriculum Review Advisory Committee and a mentor to new professionals seeking the REALTOR® association Certified Executive designation.

Formerly, she led the NAR Leadership Academy advisory board, as well as several task forces and workgroups.

“The award is a source of great pride to our organization,” says Joann Erb, 2015 president of the Greenwich Association of REALTORS®. “Theresa is recognized for her contributions here in Greenwich, the state of Connecticut, and the nation. We are honored to have our executive receive such an honor.”

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Safety Gadget as Member Benefit

The Columbia Board of REALTORS® in Missouri now offers its 545 members the personal security device Guard Llama as a member benefit to address ongoing concerns about REALTOR® safety.

The product is a Bluetooth-enabled fob that syncs with an app installed on a member's smartphone and sends the user's security profile, pertinent medical information, and live GPS location to the nearest police dispatch center in the event of an emergency.

The National Association of REALTORS® helped fund the development of Guard Llama in 2015. The company was a chosen startup in the REach technology accelerator program developed by Second Century Ventures, the strategic investment arm of NAR.

If users need help, they can either double-press the button on the fob (*pictured below*) or the alarm button on the screen inside the app. The user can disarm the alarm by entering a personal identification number. If the wrong code is entered more than once, the call will be treated as true distress, and police will be dispatched. If the user ignores the call, police will be dispatched anyway.

Guard Llama is available nationwide and accepted by all 911 dispatchers. The company connects to dispatchers in the same way that OnStar or ADT does. Guard Llama also has a certified, 24/7 security-monitoring center. Bulk discounts for associations and brokerages are available.



Congratulations New RCEs

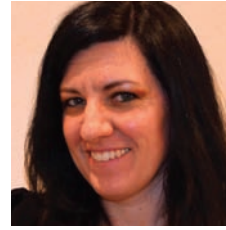
These 19 REALTOR® AEs earned their REALTOR® association Certified Executive designation after an extensive course of study and exam. RCE is the only designation created specifically for REALTOR® association executives. It exemplifies goal-oriented AEs with drive, experience, and commitment to professional growth. For more information on getting started toward your RCE, visit realtor.org/rce.



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Joshua Hunt, RCE, CAE
National Association of REALTORS®



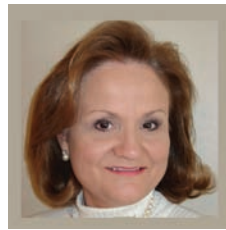
Lee Jinks, RCE
Greater McAllen Association of REALTORS®, Texas



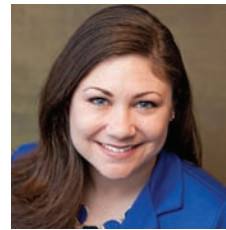
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New York State Association of REALTORS®



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Central Hill Country Board of REALTORS®, Texas



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Mainstreet Organization of REALTORS®, Ill.



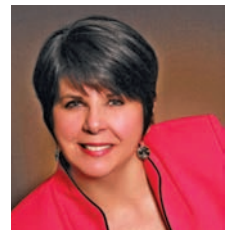
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West San Gabriel Valley Assoc. of REALTORS®, Calif.



Rachel Tristano, RCE, CAE
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Janie Wilson, RCE
Northern Kentucky Association of REALTORS®



Associations Benefit From Having a Good Neighbor Among Membership

Winning a national award is a great source of pride for any REALTOR®, but it can also be very rewarding for the local and state real estate association. The Good Neighbor Award, which recognizes REALTORS® for making an extraordinary impact on their community through volunteer work, has become one of the most revered accolades that an NAR member can achieve. Their associations take pride in having nominated and supported someone who does so much to help others in the community.

The Indiana Association of REALTORS®, for example, has had three Good Neighbor winners in recent years.

“One of the things associations are uniquely positioned to do is convey peer recognition, which is incredibly meaningful to the individual honored,” says Karl F.

Berron, CAE, the association’s CEO. “But it also allows us to hold up recipients internally as examples to other members, and externally as ambassadors for our industry. Its been a really positive experience for IAR.

Good Neighbor Award winners are recognized during the REALTORS® Conference & Expo as a centerpiece of the General Session, where they always draw a standing ovation. Winners are featured on the cover of the November/December issue of REALTOR® Magazine, which goes to more than 1 million readers.

In addition to the benefits to the REALTOR® and his or her nonprofit, the association also enjoys: inspiring content for your publications, national and hometown publicity, increased member interest and morale, \$10,000 investment into the charity and the community, and the potential to get

other members involved.

Each year, five Good Neighbor Award winners receive a \$10,000 grant for their nonprofits. Winners also receive travel expenses to the conference and considerable national and local media exposure for their cause. In addition to the winners, five honorable mentions each receive a \$2,500 grant.

“The Good Neighbor Awards remind us that REALTORS® lead the way in building stronger communities in positive ways,” says National Association of REALTORS® President Tom Salomone, broker owner of Real Estate II, Inc. in Margate, Fla.

Nominees must be NAR members. Their volunteer work does not have to be related to housing or real estate. The nomination deadline is May 13. For an entry form visit realtor.org/gna. Questions? Contact Sara Geimer, sgeimer@realtors.org, 773-459-6627.

2016 ENTRY DEADLINE MAY 13

REALTOR® Nancy Hines has improved people's lives by co-founding a nonprofit that helps women with ovarian cancer.
Nancy is a Good Neighbor.

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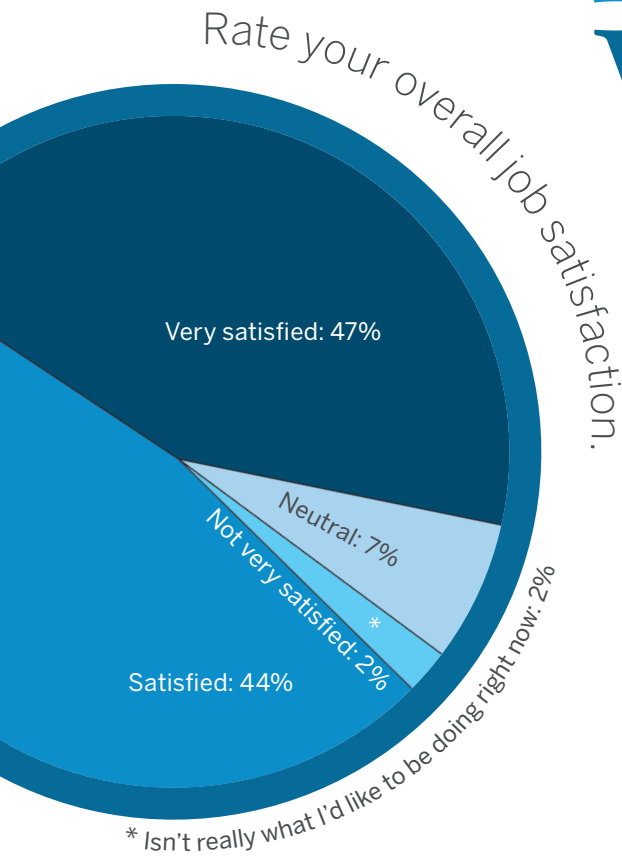
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AEs Love What They Do

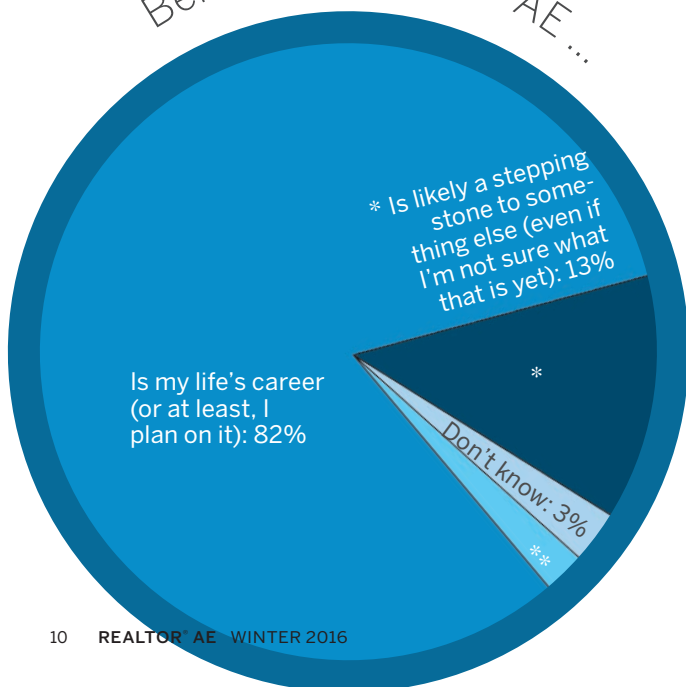


RAE's Job Satisfaction Survey finds most association executives hope to stay with the REALTOR® organization for their entire career. Here's why.

Surveys of American workers consistently find job satisfaction hovering around 50 percent. That means about half the people you know like their jobs. But if you narrow that group down to just REALTOR® association executives, then the number rockets to 91 percent.

Most AEs, according to a survey conducted by REALTOR® AE in December, are "very satisfied" with their work. They mostly like the variety of their work responsibilities and say that their salary and benefits package meets expectations. AEs surveyed said NAR provides adequate resources and training for being a successful REALTOR® AE, ranking the AE Institute as the top resource.

Being a REALTOR® AE ...



What keeps you at your job?

Many of the survey respondents who said that being an AE is their life's career are nearing retirement, having been an AE for 20 or more years. One comment summarized the typical responses: "I'm very passionate about and dedicated to what I do. I love being an AE (most days)."

The respondents who said being an AE is a stepping stone to another career offered responses such as: "I really enjoy my job but if a more lucrative opportunity arose that made sense, I would jump at that opportunity." The two AEs** who admitted their job isn't what they'd like to be doing right now cited burnout and frustration with "leading a group that does not want to belong."

“I love fighting to protect private property rights and home ownership; these are super important in maintaining strong communities and achieving the American Dream.”
— AE survey respondent

What do you like most about your job?

Survey respondents were asked to pick from these options:

- The variety of my work responsibilities: 44%
- Leading the organization (determining its future and guiding my staff): 34%
- Contributing to the success of REALTORS® businesses: 11%
- Interacting with the membership: 6%
- Working with the volunteer leaders: 4%

AEs also elaborated on what they like most about their job, with many saying they loved all of the above. Others said they truly admire their volunteers: “I have a soft spot for working with REALTOR® volunteers. They are amazing and I genuinely feel part of the REALTOR® family.”

Do you have access to enough REALTOR® AE-specific professional development and training?

Most AEs (75%) said NAR provides adequate training on how to be an AE (11% weren't sure and 8% indicated inadequate resources). The survey also asked AEs to rate various NAR resources for their usefulness as tools for learning how to be a better AE and better manage their REALTOR® association.

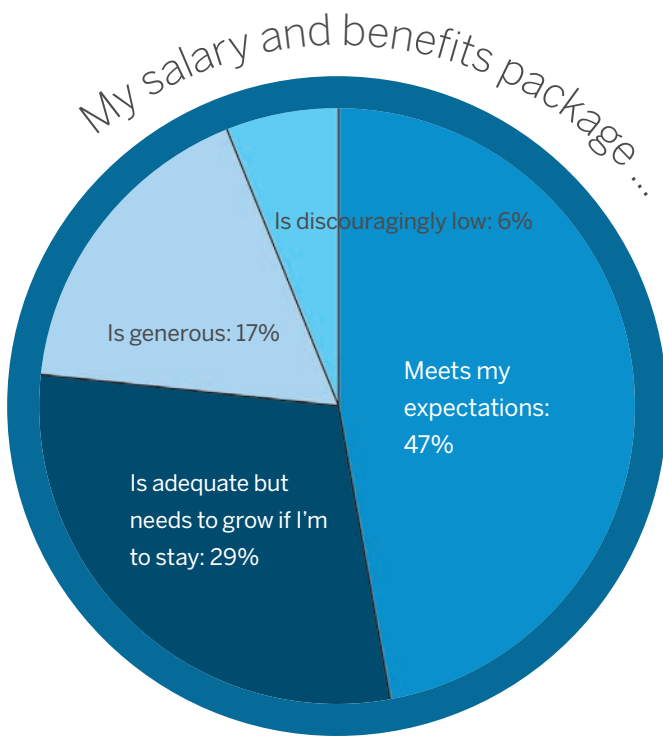
Most AEs said the **AE Institute** is either a great (63%) or a good (18%) resource; **NAR staff** is also highly ranked as either a great (55%) or a good (30%) resource. Most AEs said **realtor.org** (including its various toolkits, guides, and databases) was a good (46%) resource, with 34% indicating that it's a great resource. AEs indicated that **REALTOR® AE magazine** is mostly a good (48%) resource; 34% said it's a great resource. The **Internal News Service** was viewed as mostly a good (45%) resource, with 29% saying great and 18% saying fair. The AE Committee and AE work groups were mostly viewed as a good or great resource, with 15% of AEs indicating they had not used this resource.

How good an AE are you?



What would make you more satisfied with your job?

Survey responses to this question were broad, but three were mentioned often: Leadership that understands and appreciates the role of the AE, leadership that has more training for the positions they hold, and higher pay. One respondent said: “I find that select members don't understand that we are a membership organization: that they do not 'own' us and we are not their employees.” Another AE said his job would be easier if his association could “attract high-level firm managers and owners onto the board—REALTORS® who know how to run a business.”



Salary expectations

AEs' annual salaries as reported in this survey ranged widely. The largest group (22%) reported a salary and benefits package above \$120K annually; 17% indicated a \$60K – \$79K salary; 16% reported a \$20K – \$39K salary; 14% reported \$80K – \$99K; 13% reported \$100K – 119K; 11% reported \$40K – \$59K; and 7% reported an annual salary below \$20K. Please keep in mind the specific duties of an association executive, hours worked, demographics, and membership and staffing sizes vary widely. For a more thorough survey on AE compensation, see the 2014 Local Association Compensation Profile Survey online at realtor.org.

Career history

Before becoming an AE, most survey respondents (57%) indicated they had management or supervisory roles; 24% had executive or business-owner level roles; 14% held entry-level or administration roles; 3% were unemployed for an extended period of time; 1% were students; and 1% had been retired.

Where (besides NAR resources) do you look for career guidance or management education?

To become the best AEs they can and stay at the top of their game, survey respondents cited these resources for continuing education and guidance:

- ASAE (American Society of Association Executives) meetings, webinars, publications
- Local university and college workshops
- Books and publications about the nonprofit world, technology, management, HR
- Local Chamber of Commerce
- Other AEs
- Community involvement
- Career coaches and association consultants

What do you dislike most about being an AE?

Most AE surveyed (40%) indicated that the "structure of a membership organization (bylaws, committees, board of directors, etc.)" was what they disliked most about their jobs. A few respondents added that the structure of their organization slowed down the decision-making process, which often led to missed opportunities.

In second place among dislikes (33%) was the "lack of growth/advancement opportunity." A common reply among the respondents was: "Once you hit this level, your options are limited unless you look outside the industry." Slightly more than 13% of respondents indicated that "working with the volunteer leaders" was what they dislike most about their jobs, yet their written-in comments indicated that working with "difficult" volunteer leaders led them to choose this answer. One AE said: "I dislike working with volunteers who have no vision or motivation toward the success of the organization and are only out for their own personal agendas or vendettas."

In fourth place on the dislike list was working with members, but again, judging from the comments, some members are a joy and others are a challenge. One AE summed it up this way: "While the majority of our members are great, we have seen a dramatic surge in the number of part-time agents and others who are not serious about the business of real estate. These members make it difficult for us to keep up the high standards and do not help to enhance the professionalism of the REALTOR® brand. These members drain the staff resources and work against the majority of the members who want to provide the best service to their clients."



Two award-winning veteran AEs ended successful careers this past December spanning a combined 68 years, seven REALTOR® associations, and four MLSs. RAE spoke to Diane Ruggiero and Christine Todd about what it takes to build a long and successful AE career, when to know it's time to move on, and how to turn over the reins gracefully.

Succession Plan

How to Go Out On Top

By Carolyn Schwaar

When Diane Ruggiero, RCE, CAE, took the stage at the 2015 REALTORS® Conference & Expo in San Diego in November to accept the William R. Magel Award of Excellence in association management, it was the fitting end to an accomplished AE career.

Ruggiero joined the REALTOR® family in the early 1980s as education director for the Cleveland Area Board of REALTORS®, and soon advanced to her first executive role with the Burlington County Board of REALTORS® in New Jersey. She served as the top executive for the Washington D.C. Association of REALTORS®, and ran the Kansas City Regional Association of REALTORS® from 2001 to 2016. She began leading the Heartland MLS in 2007 and is credited with helping implement one of the largest MLS mergers in the country to form what is now MRIS, which serves more than 40,000 members in the mid-Atlantic region.

Her achievements are many and there's still "plenty of gas left in the tank," she says. So why leave?

"I always thought I would just work and work because I loved the AE career," says Ruggiero. "It was fabulous. But then I started to notice a change in myself. When a new challenge came up, instead of thinking 'I

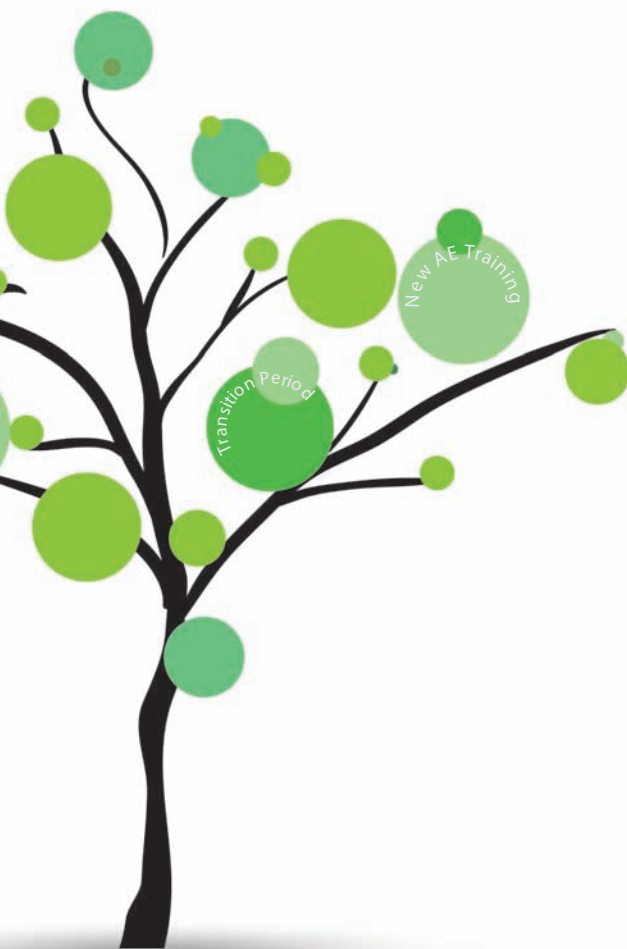
can't wait to dig in,' I wasn't excited about it."

At first she thought a vacation would recharge her batteries. But it didn't. "Especially when there was another board meeting or another inauguration or any other repeat event; after 35 years, it just wasn't exciting anymore. I realized that it might be time for me to turn the reins over to someone who would be excited for every challenge."

Coincidentally, Christine Todd, RCE, CAE, at the Northern Virginia Association of REALTORS®, was feeling the same.

"I started to think that this work is becoming too repetitive for me," says Todd. "So much of what associations do—installations, election of officers, annual budget, strategy plans—is done over and over again, and after decades, my association was running on autopilot."

Todd started her REALTOR® association career in 1978 at the Greater Boston Real Estate Board. She later joined the Greater Salem Board of REALTORS® and then the Northern Virginia Association of REALTORS® as CEO until her departure Dec. 31. She served on the board of directors of the International Real Property Foundation and conducted dozens of seminars throughout Eastern Europe, Russia, and Peru on how to run real estate associations. She is one of the



“Because we’re at the cusp of change, I felt having a person who already had all of that background would save a year in terms of getting up to speed.”

—Diane Ruggiero, RCE, CAE, former CEO, Kansas City Regional Association of REALTORS®

founding forces behind the REALTORS® Federal Credit Union and has served on countless NAR committees and work groups. She won the Magel award in 1997.

“I felt that I achieved everything I could. I’ve won every award you can win. I’m at the top of my game. I thought to myself, ‘When I leave, I want to do it at the top like Derek Jeter running around the bases with a smile on my face, waving to the crowd, and on to the next thing,’” says Todd.

That next thing for Todd is part-time consulting on association management. “I still feel good about my profession and I want to try a few more things,” she says.

Likewise, Ruggiero says she still loves the industry and the people, and wants to do something with all of her accumulated expertise. “I’m not ready to just retire and play on my boat,” she says. “I realized I just needed a different outlet for my energy, so that’s why I decided to go into consulting.”

Neither chose to establish her own business, opting instead to join successful

operations. Todd joined Adorna Carroll at Dynamic Directions and Ruggiero will work with Ann Bailey at Pranix.

Saying goodbye

Todd and Ruggiero gave their associations a one-year notice before leaving.

“I knew for the first two months they’d be in shock and denial,” says Todd, “then they’d get serious about looking for someone new, and that would take a while, and then we’d need a transition period of a few months.”

“Chris and the entire staff made the transition seamless,” says Ryan T. Conrad, RCE, CAE, who succeeded Todd. “She has been one of my biggest champions, which helped with earning staff, board, and membership buy-in. Chris and our staff took the time to bring me up to speed on major priorities and how the organization operates, and shared the different cultural norms that are perhaps most important to understand heading into a new association.”

Choosing a successor

AEs should not be involved in the search for their replacement, asserts Ruggiero, yet she did suggest her board look within the REALTOR® industry. “I believe we are truly at some important crossroads in our business in both the MLS world and the association world,” she says. “Because we’re at the cusp of change, I felt having a person who already had all of that background would save a year in terms of getting up to speed.”

Ruggiero’s board hired Kipp Cooper, RCE (formerly of the Huntsville Area Association of REALTORS® and North Alabama MLS) this past fall giving her a few months to guide his initiation. “Most of the time I spent with Kipp was going over historical perspective, why we did things in a certain way. But I told him my feelings won’t be hurt if he changed things. That’s what should happen,” says Ruggiero.

With their associations safely in the hands of new CEOs, Todd and Ruggiero have some parting advice for younger AEs just

Checklist for Retiring AEs

- Check the terms of your employment contract, if you have one, to ensure that your preferred retirement date coincides with the date your contract expires. If you don’t have an employment contract, have a conversation with your leadership to develop a written agreement that specifies your retirement intentions.
- Confirm with your

leadership that if there is a discrepancy between the retirement benefits stipulated in your employment contract and those outlined in the association’s personnel policies, your contract supersedes the personnel policies.

- Have a conversation with your leadership to determine if they want you to help transition your

replacement or if they want you to leave before the replacement starts. Establish an end date that is specified in writing.

- If you are interested in working as a consultant for your association upon retirement, talk with your leadership about serving in this capacity.

“I urge my colleagues to go to the AEI courses. They are invaluable, but also seek out and supplement them with some business courses that train you to think critically and analyze information and communicate it effectively to people who have to make business decisions on your advice.”

—Christine Todd, RCE, CAE, former CEO, Northern Virginia Association of REALTORS®

getting started.

“To be successful, long term, you have to truly love the profession and have tremendous respect for your members and what they do,” says Todd. “I truly believe that helping people achieve the American dream of home ownership or live in a decent, affordable rental unit is a very lofty goal. I really admire my members.”

Ruggiero cultivated expert people skills, which she says has been critical for success. Sometimes she’d consult for free with boards that needed help with consensus building and forming better relationships between volunteer leaders and staff.

Todd also credits much of her success to her people skills. “You have to have very good instincts about people,” she says. “I always tell my staff that we adjust to the leadership team every year; they don’t adjust to us.”

If you don’t have people skills instinctively, Todd says, there’s still hope. “I urge my colleagues to go to the AEI courses. They are invaluable, but also seek out and supplement them with some business courses that train you to think critically and analyze information and communicate it effectively to people who have to make business decisions on your advice.”

Both Todd and Ruggiero say it’s important to be involved in NAR committees, work groups, and task forces to gain industry insights, learn from peers, and effect change, yet they caution that this level of involvement can backfire.

“It’s very important for AEs to understand that when you get involved nationally, your leadership back home can be resentful and jealous,” says Todd. “So whenever I go to a national meeting, I try to have my leadership with me. I always introduce them;

I try to get my leadership on NAR committees, and I tell them how they can become a director. I always show them that my giving to NAR always has a benefit for them.”

In addition to committee work, Todd would take on consulting and speaking jobs at other associations, but always asked her leaders for their consent. “I always made sure that my board gave me approval. They viewed my involvement as not only good for me but also a credit to them. It reflected positively on the association that somebody would want their CEO to come in.”

Fortunately for the AE community, Todd’s and Ruggiero’s vast expertise is just a phone call away, although now, perhaps not for free. Contact Diane Ruggiero at diane@pranix.com and Christine Todd at CMTcae4@gmail.com.

Don’t Wait, Plan Now: Succession Planning for REALTOR® Associations

NAR’s AE Committee has developed a variety of detailed guides and checklists to help you prepare your association for your departure, even if you have no plans to leave any time soon. These guides (available on realtor.org) outline steps associations should take to ensure the process, whenever it happens, runs smoothly.

One key resource is the sample succession plan. A succession plan policy is a document approved by your

board of directors. It includes a checklist of procedures your association will follow when the planned or unplanned departure of the executive officer is announced.

Among other things, this policy is a commitment by staff and leadership to make an orderly transition in the best interest of the membership. It details who and how to select an interim executive, what essential skills any new EO should have (a basic job description), the process for searching for

a permanent replacement (establish a search committee or use the board of directors?), and a “turnover” book, which includes all passwords and key procedures needed to run the association—to be used in the event that the AE is unavailable due to accident, illness, or other unexpected event. A succession plan should also include a budget to cover the hiring process, salary range, benefits, legal advice, outside assistance, and other expenses.

Are You a Social Media CEO?

Branding your personal and professional voice online.

By Andrew Sims
Communications
Director, Birmingham
Association of
REALTORS®



tessahultz
@tessahultz

CEO by day. Bibliophile, adrenaline sport junkie, urban farmer and lover of all things science in my spare time.



"I have one each of Facebook, Twitter, and Instagram and they reflect me as someone who loves her job, talks about it a lot, but also has a life outside of work to stay balanced."

—Tessa Hultz

Do you share your vacation photos on Facebook with association members? Do you connect on LinkedIn with people you've never met? Have you ever posted a photo of your dinner on Instagram?

If you're like me, you've probably hesitated over and second-guessed what to post on social media, whom to connect with, and how to express your likes and dislikes.

I think about what my posts say about me as a person and as a professional. I want to communicate the right balance that not only expresses my personality but also reflects positively on my association.

Following the lead of social CEOs

Like millions of others, I follow Richard Branson, CEO of the Virgin Group, on social media. He posts insightfully on LinkedIn, Twitter, and

Facebook about topics ranging from business development and leadership to philanthropy and what he has learned from his personal character flaws. Using social media Branson has crafted his reputation and become a thought leader in business—something LinkedIn has dubbed an "influencer." Do I have a more favorable view of the Virgin Group because of him? Of course I do.

This is what a lot of REALTOR® AEs achieve through their social media presence: a heightened respect—or, at the very least, understanding—of their association's value, all that it does and all that it delivers.

The latest research shows that highly re-

garded companies are more than three times as likely as those with weak reputations to have a CEO who participates in social media.* A report by media company Weber Shandwick, "Socializing Your CEO: From Marginal to Mainstream," found that 80 percent of the CEOs of the world's 50 largest companies are engaged online and on social media. Even though only about 28 percent of CEOs are on social networks, according to the report, that number is nearly double what it was in 2010.

CEOs such as Branson use social media as their space to be human (yet still professional). They are, in a sense, "branding" themselves as funny, informed, interesting people by writing personal narratives about who they are outside of the boardroom. This works to increase their reach and connection with followers while also humanizing their organizations.

Although this type of sharing may be second nature to anyone younger than 30, the rest of us hesitate. How open should we be on social media? What are the risks? What's the line between personal and professional?

Why become a social CEO

"I believe it is part of my job to be active on social media," says Iowa Association of REALTORS® CEO Gavin Blair. An interactive CEO is important in today's world, he says, noting that "members want touches many different ways. Social media is just one of those ways to reach them."

Blair says he likes to keep things 50-50 when it comes to the content mix of professional and personal. "I have definitely had to put more of a

* *The CEO Reputation Premium: Gaining Advantage in the Engagement Era*, Weber Shandwick and KRC Research.

filter on what I say and how I say it," Blair says. "I come from a political background and I tend to share some political discussion, but I've tried more recently to avoid that conversation publicly in my role. I share a lot on sports and real estate."

Blair says if you want to be treated like a person, you have to brand yourself as a person outside of your role in the office. Facebook, LinkedIn, Twitter, and other platforms enable you to show who you are rather than simply what you do.

The companion to all this sharing is listening. Blair says his social media accounts also help him keep track of issues that members and other industry influencers are talking about and address them quickly online.

Post with purpose

Although social networks are a great place to promote your association and keep tabs on your market, if you're all work and no play, members will unfollow you, says Ryan Conrad, RCE, CAE, CEO of the Northern Virginia Association of REALTORS®.

"Try to make your posts fun and interesting and not always just about work or the association," Conrad says. "Members will soon drown you out as background noise if what you post becomes uninteresting."

Conrad has nearly 800 followers on Twitter and posts regularly about conducting classes, attending industry conferences, and meeting with members. He also posts photos of his office holiday decorations and members having fun at association social events. His Facebook cover photo is typically the association office building or a group photo of his staff or leadership.

Conrad says he friends anyone who appears to be legitimately involved with organized real estate. "This includes REALTORS®, vendors, AE colleagues, volunteer leaders, elected officials, and lots of others. I want to be connected to as many industry professionals as possible to gain a



"I'm reaching an audience that is highly targeted, at no cost, in that they have asked for permission to enter my world and see my events here at the association."

—Cliff Long

broader perspective on what's happening out there and to share my association's message."

Be a person—not just an AE

Some association executives take the stance that the association-branded social media accounts should be used for work and that their personal accounts are just that—personal. Yet in the clutter of social media, a post from a person is always louder than one from an organization. AEs are finding that the opportunity to make a one-on-one connection with members and others via social media is increasingly valuable.

Tessa Hultz, RCE, CAE, CEO of the Raleigh Regional Association of REALTORS®, says she keeps her Facebook profile pretty personal even though her more than 1,300 "friends" include members, colleagues, media, and community leaders. She posts association news along with family photos and reposts everything from interesting science articles to NAR research.

"I don't attempt to divide myself into personal and professional," says Hultz. "I have one each of Facebook, Twitter, and Instagram and they reflect me as someone who loves her job and talks about it a lot, but also has a life outside of work to stay balanced."

Cliff Long, RCE, CEO of the Birmingham Association of REALTORS®, is more guarded with his social media accounts.

"I do not accept friend requests from everyone," Long says. "I learned quite simply that everyone is not my friend and that sometimes social media provides personal insight that I may be uncomfortable with people knowing."

Long screens requests and annually purges friend lists, eliminating those who don't post regularly. Yet he's convinced of the value of his social media presence.

"I am reaching an audience that is highly targeted, at no cost, in that they have asked for permission to enter my world and see



"I believe it is part of my job to be active on social media. I have definitely had to put more of a filter on what I say and how I say it."

—Gavin Blair

“I want to be connected to as many industry professionals as possible to gain a broader perspective on what’s happening out there and to share my association’s message.”

—Ryan T. Conrad



my events here at the association,” Long says. “This helps me reach my members and colleagues where they are most often, and that is digesting information online in a social setting.”

Facebook and Twitter and Instagram, oh my

With so many networks in social media, it’s hard to pinpoint which is best suited for creating a space for CEOs outside of the office. The idea that LinkedIn is for work and Facebook for friends is fading, perhaps because members want to be where their customers are, and associations want to be where their members are.

Hultz uses Twitter mostly for professional discussion and connection. Conrad says he’s experimenting with SnapChat, a photo sharing app, for his association because of its rise in popularity with younger adults. He has all but abandoned Google+ because of its lack of popularity among members.

Long says his biggest piece of advice for AEs and social media is to know what their staff is talking about and how they are marketing themselves online while making sure to give staff members the freedom to be themselves.

“I try hard not to comment on employees’ personal posts, and for the most part I stay

off their personal pages,” Long says. “In fact, I take them out of my news feed because it can be an invasion of both parties’ privacy. There needs to be some distance.”

Conrad says everyone on his staff is required to maintain a professional Facebook and Twitter account for the primary purpose of connecting with members. “We put staff’s social media contact information on their business cards and e-mail signature lines so members know they’re accessible through social media.”

Balancing your employees’ rights and privacy with your association’s communication needs requires a clear policy—and perhaps a lawyer’s advice.

So should AEs always represent their association’s voice, even in their personal social media accounts? The answer is not clear. But as social networks reach out of our personal lives and into our professional lives, certainly there’s cause to question posting that photo of yourself at the beach.

Tips for Managing Your Online Persona

My social media use has changed over time, and I’ve recalibrated how I interact with friends and followers. It’s an evolving relationship.

Today there’s less discussion of balancing personal and professional online and more talk about successfully integrating the two. You don’t want to be too personal, but you don’t want to be all business. This is a comfort level that will be unique for each individual, but here are some tips to help you achieve the online persona that’s most true to you.

- Don’t mix your business and personal accounts unless you feel comfortable doing so—comfortable with the content and the technology.

- Do you know how to control your privacy settings and organize your friends and followers into separate silos? We’re all pressured to friend members, colleagues, or acquaintances on Facebook, but that doesn’t mean you have to share everything with them. Send your messages to target audiences.

- Make a policy for what you’ll post and stick to it. For example: “I’m not going to post photos of my family” or “I’m only going to post photos of my family on platforms where I have reasonable controls over who can see the photos.”

- If you’re not sure a post is too personal, send it just to a friend or colleague first to gauge reaction.

- Instead of liking and reposting everything you find interesting, find a theme (other than real estate) that reflects you and stick to it. For example, brand yourself as a dog lover, a classic car buff, or an avid long-distance runner. Find one or two things outside of work so your followers will remember them; too many likes and reposts will dilute your personal brand.

- Just mentioning your association event is promoting it, so there’s no need to say “sign up now” in your personal posts—plus it turns off followers. Your friends and followers want to know what you think or feel about the event and why it’s important.

- Remember, posts are forever.

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Are You CEO Material?

The traits and skills associations are looking for in an executive officer today.

After more than 25 years in the executive search business placing more than 200 CEOs—including 15 REALTOR® association top executives—I've learned a thing or two about what association boards of directors are looking for when recruiting a new CEO.

The search for a new CEO always starts with a long wish list of characteristics, usually paired with the caveat, "There is no way anyone could meet these requirements, but this is what we want to see in the candidates you bring us."

We hear this all the time. At first, the wish list of CEO characteristics is long. But as the search progresses, the same four or five key criteria always move to the top. And despite every association's reliance on technology today, "tech savvy" still isn't in the top five.

Strong communication skills

It's startling to see how few well-educated and successful executives actually have good communication skills. We've seen highly reputable executives lose a chance at an opportunity due to their inability to clearly articulate answers to the questions asked.

The best CEOs are clear and concise. Remember the simple principle: Less is more.

Say what you need, with no ifs, ands, or buts. You'd be surprised at how many senior executives obfuscate, reverse themselves, take multiple positions, and leave audiences confused and unimpressed. Simply put, direct and succinct answers will resonate well with any audience.

Entrepreneurial mentality

Entrepreneurs reach out beyond their own organization and industry; they listen and talk to people from a wide range of backgrounds. They encourage and solicit off-the-wall ideas and then use experience and imagination to make the ideas come to life. Boards like a CEO with an entrepreneurial bend—one who can think beyond the obvious, who is not afraid to try new ideas from outside the association management norm and outside real estate.

Boards often say they need a CEO with new "energy" and ideas that will bring in new income or cut costs without sacrificing services. Look for innovative ways in which you can affect positive change in your association through nontraditional means. And if you never thought of yourself as a particularly inventive risk-taker type, then surround yourself with people who are.

Strategic thinker

A strategic thinker is a priority for all boards. They want an AE to have a view of the future and be able to clearly articulate (there's that communication skill again) a strong vision of where an organization can be in two, three, or five years—not just how he or she will deal with today's crisis.

I've seen association recruiting committees wowed by CEO candidates retelling "war stories" of developing and implementing strategic concepts, and how they saw where the association needed to be and took the steps to bring it there.

Business savvy

Every professional society seems to think at first that the best CEO will be from their ranks. Yet as the search progresses, organizations become more realistic about the talent needed in a CEO. Real estate expertise and membership relations are no longer on the list of top AE skills. Boards have shifted to focus more on selecting executives with broad business savvy to lead their organizations.

It became clear during a search committee discussion in 2015 that across-the-board communication skills, strategic thinking, and



"Boards like to see excitement and commitment—a real passion for what you are doing." —Leonard Pfeiffer

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solid management experience were the most important criteria, even more important than industry-specific knowledge.

The most desirable CEO candidates are those who have overall business experience in accounting and finance, advocacy, management (of the board, staff, and volunteers), marketing, communications, and technology. By no means should they be experts in all fields, but experience across many is important.

Likewise, diplomacy and the ability to work with the executives in charge of these fields are crucial. A demonstrated knowledge of working well with others inside and outside the organization is key. A CEO is not someone who can do it all independently.

If you don't already have an extensive background, broaden your involvement to diversify your skill set. Association experience can be very attractive, but if you're a political affairs director or a communications director and your expertise is limited to one sector, make yourself more attractive by expanding your portfolio through education or volunteer work.

A motivator

Of course, all these new communication, strategic thinking, entrepreneurial, and management talents don't work well if you are not able to motivate the world to follow you. Boards like to see excitement and commitment—a real passion for what you are doing. This all translates into the motivation factor. Boards ask themselves, "Can this candidate get the board, the staff, the public excited about our issues?"

This is not to say that you have to be a fearless Gen. Patton-style leader, but George Patton's strengths included an absolute commitment to getting the job done. Like all great leaders, Patton had great passion that motivated others to follow. If you want to lead, if you are to be the CEO, you need to care, to have a passion for all aspects of the job. Although you cannot manufacture the kind of ardor that motivates devotion, you can stoke the flames of passion by reminding yourself precisely what it is about becoming a CEO that so inspires you. That passion, that enthusiasm, will become contagious and motivate others to listen to you, to work with you, and to follow your lead.

To prepare yourself to be a CEO—or a better CEO—assess your present strengths and experiences. Do they include most of these five attributes above? If not, build up those aspects of your experience and take your AE career to the next level.



Leonard Pfeiffer heads Leonard Pfeiffer & Co., a national executive search firm. He can be reached at 202-737-6327 or BD@pfeiffercompany.com.

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How to Grow Great AEs

Mentoring, education, and a sense of purpose matter to younger AEs.

Attracting younger generations to volunteer at your association can be difficult, but harder still may be attracting young professionals to work there. How can you entice talented young people to your organization and encourage them to pursue a career in REALTOR® association management?

Value character over experience

Although many successful REALTOR® association CEOs rise through the ranks, AEs come from diverse backgrounds. In fact, their previous jobs vary widely, according to a REALTOR® AE magazine survey of AEs conducted in December.

Many AEs are former real estate professionals—either practitioners or brokerage office managers—but survey responses also included paralegal, retail manager, and CFO for a large manufacturing firm. This shows that understanding real estate isn't always a necessity for a new AE.

Being able to manage business processes and people, however, is a sought-after skill, the survey found. Most survey respondents (57 percent) said they had management or supervisory jobs before becoming a REALTOR® AE; 24 percent had executive or business-owner level positions; and 14 percent had administrative or entry-level jobs before to becoming an AE.

Highlight continuing education

AEs and association staff appreciate opportunities to participate in professional development education and events. The retention rate is more than two-thirds higher at companies where employees felt the training

opportunities were excellent, according to a Louis Harris and Associates poll.

Professional development opportunities for REALTOR® AEs and staff abound. Not only are there national courses (both online and live), there are designation programs, annual conferences, and usually state-level training, as well. Many associations make NAR's association management online courses required for all staff members.

Mentor and guide younger professionals

Studies show that younger professionals prefer to learn from coaches and mentoring. "Mentoring programs can be particularly effective at retaining millennials and also help to relieve tensions between generations," according to the PricewaterhouseCoopers report "Millennials at Work, Reshaping the Workplace."

NAR offers a formal mentor-matching program for new AEs. The main topics in which younger AEs request guidance from their mentors, according to RAE survey respondents, were career development, advice for how to handle difficult directors or officers, and specific program ideas, such as

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themes for successful REALTOR® Political Action Committee fundraising events.

NAR's AE Young Professionals Network advisory board, which was established in 2014 to encourage and promote involvement, volunteer leadership opportunities, and career development among young association staff professionals at all levels of the REALTOR® association, is now a formal NAR advisory board.

Promote the core values

Younger professionals want to do something that feels worthwhile, according to the PwC report; they take into account the values of a company when considering a job, and they are motivated by more than money. A REALTOR® association can attract and retain younger workers by showcasing its community involvement, charity donations, advocacy for the rights of home owners and small-business owners, and programs such as the REALTORS® Relief Fund and the Good Neighbor Awards.

Honor and feature successes

In 2014, NAR established the Leaders of Tomorrow Young Professionals Award to recognize younger AEs who have fostered greater involvement and increased professionalism among their peers and members.

One of the strongest millennial traits is that they welcome and expect praise for a job well done along with detailed, regular feedback, according to the PwC study. Taking the time to support and recognize younger employees will make them feel valued, so they are more likely to stay and advance at your association.



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Need Legal Funding?

NAR spends hundreds of thousands of dollars a year funding legal action involving associations, MLSs, and members to influence laws nationwide.

From defending against antitrust claims and overturning burdensome local ordinances to stopping online copyright infringement of MLS listing data, associations seek NAR funding for roughly a half-dozen cases a year. Is your association aware of the assistance available from the Legal Action Program?

Here is a detailed description of the program, including an explanation of who qualifies and how to apply.

What is the Legal Action Program?

In 2015, NAR's Legal Action Committee, which comprises 17 REALTOR® members, reviewed five applications for financial assistance. Four qualified for funding: one case defending an association's arbitration award, one defending an MLS against an antitrust claim, and two defending real estate firms against patent infringement claims.

Applicants before the committee qualify based not only on financial need but more importantly on the content of the cases. The committee funds important litigation affecting NAR, state and local associations, members, and real estate owners where the cases might have a direct or indirect impact on the entire real estate industry.

At the outset, the program's focus was directed to litigation affecting member boards and arising under federal law, but the scope of the program was later expanded to include litigation arising under state or even local law—for example, fighting ordinances restricting For Sale signs.

Requests for assistance involve a broad scope of legal issues, including antitrust, fair housing, property rights, First Amendment issues, intellectual property matters, RESPA

and claims against brokers for misrepresentation, and a variety of others.

Legal Action Program assistance comes primarily in the form of funding for attorney's fees and costs incurred in the litigation, and also by authorizing NAR participation as "amicus curiae," or "Friend of the Court," in appropriate cases.

The NAR Legal Action Program has supported hundreds of important cases during its 45-year history. The committee encourages and welcomes requests for support and eagerly looks for opportunities to influence the results in litigation to improve and clarify the legal climate for real estate professionals, associations and MLSs, and real estate owners and users.

How to apply for funding

Parties requesting assistance submit a request form and other relevant information that sets out the nature of the case, the facts underlying the case, and the factual and legal issues that are likely to be addressed. The request also explains why the case may have an impact not only on the litigants but also on other real estate professionals, property owners, real estate transaction or brokerage practices, the operation of real estate associations, or other industry issues.

If you're not sure if your case has national

implications, call your state association's legal action program representative or an NAR staff attorney. Most state REALTOR® associations and some locals have established legal action programs of their own and often recommend cases to NAR's program.

Who qualifies for funding?

At its biannual meetings, the Legal Action Committee usually hears oral presentations by the requesting parties and may ask questions. In the case of an association or MLS seeking funding, the AE typically makes the presentation. The committee considers as few as two or three requests to as many as 12 to 14 requests for a very busy meeting.

A critical consideration for the committee in each case is whether it involves factual or legal issues that affect only the parties to the case (or a small segment of industry participants) or whether it may affect the industry nationwide and contribute to the development of law in a way favorable to the industry. The committee then considers each request in executive session and makes a recommendation to the NAR Board of Directors on funding.

For more about the Legal Action Program, how to apply for funding, and the Legal Action Committee, visit realtor.org/programs/legal-action-program.

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NAR has funded some of the most significant cases in real estate legal history, shaping both communities and members' businesses.

Defend MLSs' right to require association membership.

Beginning in the 1980s and continuing for years, the committee provided significant support to associations and MLSs faced with antitrust-based challenges to their requirement of REALTOR® membership as a condition of MLS participation. The membership requirement was upheld in most of those cases, although in a few states the MLS was not successful, and in those states MLSs may not require participants to be REALTORS®. For example, NAR helped fund the defense of the South Central Wisconsin MLS when a member brought an antitrust lawsuit against the MLS, the local association, and the association's directors for tying association membership to MLS services. The court found in favor of the MLS, in part because the member had offered no evidence that he had unreasonably been denied access to MLS services.

Keep For Sale signs legal.

NAR has help fund numerous cases challenging municipal ordinances narrowly restricting real estate For Sale signs. For example, in a landmark case in 1999, the Sandhills Association of REALTORS® (along with other plaintiffs) challenged the constitutionality of a local sign ordinance in the village of Pinehurst, N.C. on the grounds that it interfered with their First Amendment speech rights. The association argued that the ordinance improperly disfavored real estate signs over signs displaying other kinds of content. When such speech is restricted because of its content, courts evaluate the regulation much more rigorously and in this case declared the ordinance unconstitutional because of the content-based difference in treatment.

Defend homeowners' property rights.

The Legal Action Program has supported property owners in a variety of cases involving property rights, such as whether certain restrictions on development or use of property result in "takings" of property for which the U.S. Constitution requires payment of just compensation. Property rights cases also include regulatory issues such as whether property was correctly and fairly determined to be wetlands subject to extensive federal regulations on use.

Defend members' duty to arbitrate.

A significant number of cases involve the duty of REALTORS® to arbitrate disputes under the Code of Ethics or challenge the result of an association arbitration proceeding. The success rate in such cases is very high, with almost all courts upholding members' duty to arbitrate or confirming and ordering enforcement of association-issued arbitration awards. For example, in 2009 the Indiana Court of Appeals affirmed the dismissal of a real estate broker's action to vacate an arbitration award to another broker.

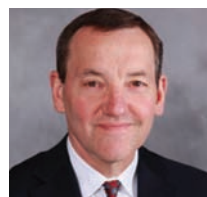
Defend against patent trolls.

Recently, NAR has provided financial support to real estate professionals sued by "patent trolls" for patent infringement in cases involving patents of doubtful validity or allegations of infringement for activities outside the scope of the patent. In those cases, the defendant real estate firms denied the infringement or challenged the validity of the patents. Faced with a vigorous defense by the defendant real estate firms, assisted by NAR, the patent owners dropped their claims against the firms.

Defend brokers against personal liability for agent actions.

Several important victories have also been achieved in the U.S. Supreme Court in cases in which NAR filed "amicus curiae" briefs approved and funded by the Legal Action Program: In *Holley v. Meyer*, the court held, as NAR had argued, that owners of incorporated real estate firms could not be held personally liable for alleged violations of the Federal Fair Housing Act by agents of the firm.

The NAR scorecard of legal wins and losses is impressive. View a selection of cases funded, by category, online at realtor.org/programs/legal-action-program/legal-action-case-support-scorecard.



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What AEs Need to Succeed

Angela Shields on communication, education, and service.

Successful association executives are multitasked. Aside from the obvious executive-level skills and boardroom diplomacy, AEs have to be able to recognize opportunities, capitalize on resources, communicate concisely, and never stop expanding their own knowledge. This definition of success is a perfect fit for Angela Shields, RCE, CAE, CEO of the San Antonio Board of REALTORS®, Texas.



San Antonio Board of REALTORS® CEO Angela Shields

Shields began her career with the REALTOR® organization in 1993 in Athens, Ga., as an MLS executive. She later became the CEO of the Athens Area Association of REALTORS® before taking the top post in San Antonio in 2010.

Over the years, she has served as the chair of the Texas AE Council and the Georgia AE Committee. “One thing of which I’m certain is that it is beneficial when AEs have a strong interstate working relationship, especially now that there are so many opportunities for shared services,” she says.

On the national level, Shields has been instrumental on several NAR committees

and workgroups, including the AE Committee and RCE Certification Advisory Board; the Data Strategies Committee; the Federal Technology Policy Advisory Board; and the Land Use, Property Rights and Environment Committee.

Participation is a passion for Shields. “I’m involved in state and national committees and workgroups because I believe in the real estate industry,” she says. “We encourage our members to participate, and I wouldn’t ask them to do anything that I wasn’t willing to do myself. Not only is it a great way to learn, but I have met so many of my colleagues from around the country and have formed great friendships.”

Shields says her AE colleagues are more than friends; they’re the most valuable resource for association management best practices. “Having a trusted network of colleagues and peers to turn to when you have questions and want to share ideas is powerful, and building relationships in the industry is crucial,” she says.

One relationship Shields cultivates very astutely is with the media. With her background in communications, she is more than comfortable in front of the camera but strategically shares the spotlight with leadership and members.

“We’ve learned over the years that to be the voice of real estate and a reliable resource for the press, we must have several ‘voices’ prepped and ready to go with our messaging at a moment’s notice. Because we act quickly and have many spokespeople available—both leaders and members—the media come to us on a regular basis,” she says.

Social media also features prominently in San Antonio’s communication strategy. “I am a big believer in the fact that we must

use all forms of communication if we want an opportunity to connect with our members,” says Shields. “It’s also a great way to listen to our members and to understand their business at any given moment. I try to live by a general rule: Never post anything I would be embarrassed to see down the road.”

By way of advice for less experienced AEs, Shields offers this on building a successful career: “Never stop learning. We are in an industry that is ever-evolving and no matter the length of our career, we will never know it all.”

San Antonio will provide a great backdrop to the learning and sharing at the 2016 AE Institute. “Everyone should visit the Alamo and Tower of Americas and take the water taxi to the Pearl for great restaurants and shopping,” Shields advises. “And most important, explore the Riverwalk path well past the tourist area to really appreciate the city’s beauty. If you’re spending extra time in the area, take a day trip into the Hill Country. There you might be surprised to find wineries and beautiful scenic views.” Of course no trip to San Antonio is complete without a Texas-size portion of Mexican food. Shields’ top restaurant recommendations are Boudro’s, Rosario’s, and Liberty Bar.



Shields appearing on a local television news program.



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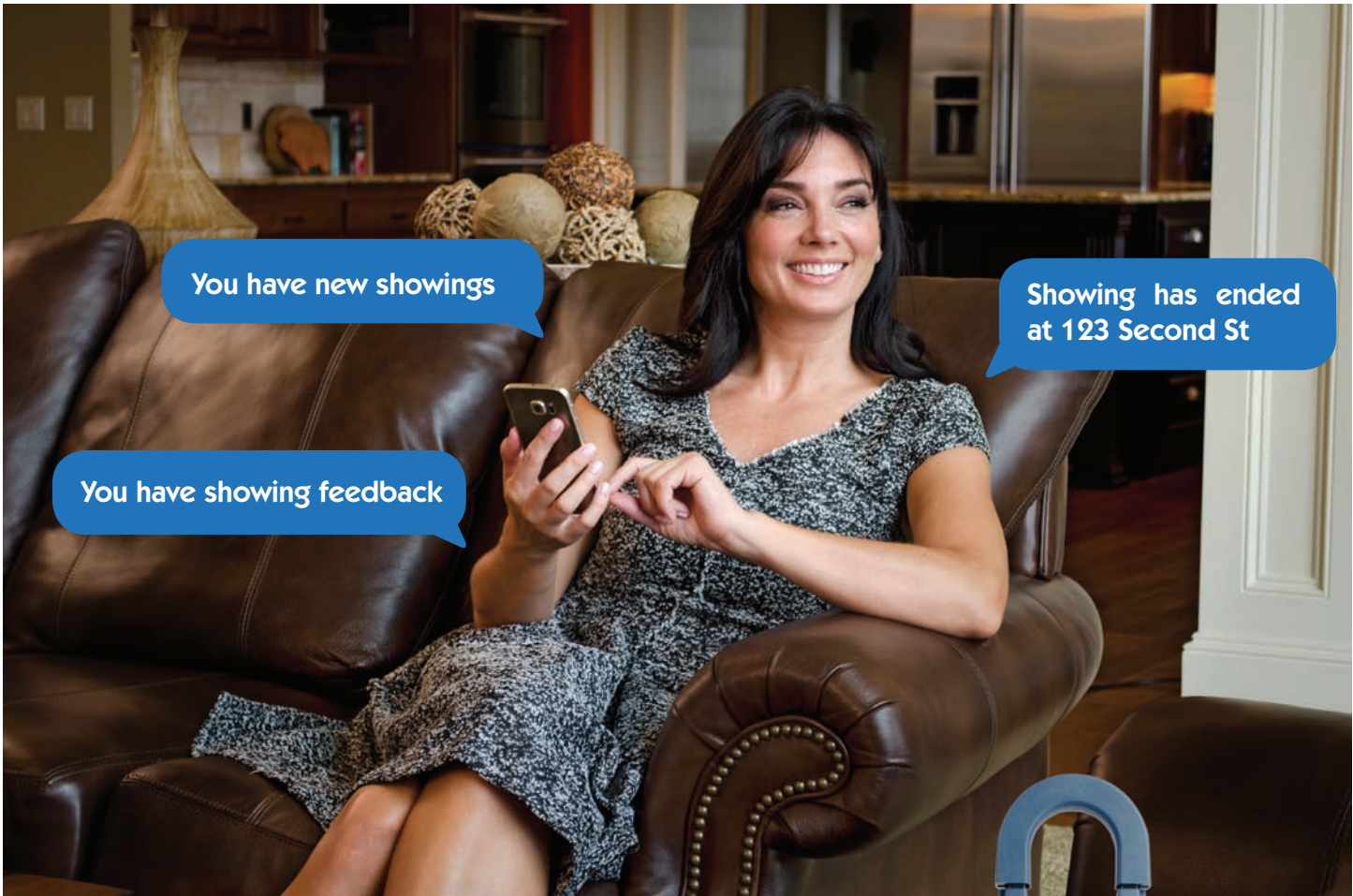
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