

REALTOR® AE

NAR.REALTOR/RAE

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

To join the editorial board, write an article, or contribute information, e-mail Carolyn Schwaar, cschwaar@realtors.org.

REALTOR® AE

Winter 2017

features

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No Better Time to Take Action



Michael Theo, RCE, CAE,
CEO, Wisconsin
REALTORS® Association,
2017 chair of the
AE Committee

Well, I didn't see that coming. Neither did most people. But the contentious election of 2016 is now in the history books and it's time to ask, "Now what?"

You may disagree with their decision—and there are certainly a great many in this country and likely this association who wanted a different outcome—but the voters have the last word and they spoke. President Donald Trump and his new executive branch of the federal government are making the transition from politics to policy. We must, too.

We must all realize that vitally important policies affecting our industry and scores of property owners will soon be debated and decided in the halls of Congress and the town halls across America. We must engage. This is a time for our members to participate in the lawmaking process, regardless of their political affiliation.

Our members need to take action because the long-predicted federal tax reform debate is upon us. Republicans, now



in control of Congress and the White House, generally support broadening the tax base to lower tax rates. This means limitations on key real estate provisions of the tax code will be debated, including the mortgage-interest deduction, deductibility of property taxes, like-kind (1031) exchanges, and the capital gains exclusion. Possible regulatory reforms likely will focus on revising some regulations on financial institutions imposed under Dodd-Frank, the power and reach of the Consumer Financial Protection Bureau, and the long-term future of the government-sponsored enterprises Fannie Mae and Freddie Mac, to name just a few.

The potential impact of reforms in these and other real estate-related areas will have a significant effect on the national economy, our industry, property owners, our members, and their customers and clients.

So now, we as association executives must focus our attention, and that of our staff, on the task of engaging our members like never before in these epic public policy debates on the horizon. This means we must keep them informed, help them communicate with their elected officials (particularly members of Congress), encourage them to respond to every NAR Call to Action, and motivate their colleagues to do the same.

No matter how you or your members feel about the election outcome, the tax and other industry-related issues that are certain to be debated during the next few years will be every bit as historic as this past election. Our best political message to members: Do not disengage at precisely the moment we, as an industry and association, need to intensely engage. In this cause, we as a REALTOR® family must be united.



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KEEP REALTORS® AT THE
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The NATIONAL ASSOCIATION OF REALTORS® and zipLogix™ are working together to keep REALTORS® at the center of the transaction today and into the future.

Provided by NAR and delivered through zipLogix™ technology, REALTORS® nationwide have access to zipTMS™ robust transaction management system, unlimited zipVault® document storage, an exclusive NAR library of *REALTOR® Forms & Templates*, and access to the industry-standard zipForm® Plus forms engine where members can add and manage their own custom documents. State and local forms libraries may also be available if they are licensed to zipLogix™ (some fees, which are set by state and local associations/boards, may apply).

REALTORS® will benefit from zipLogix™'s state-of-the-art technology, which ensures data integrity, security and disaster recovery and a standardized technology platform designed to create efficiencies and streamline processes.

With this step toward a comprehensive transaction platform, NAR is committed to making sure REALTORS® have the tools they need to succeed in today's dynamic real estate environment and remain at the center of the real estate transaction.

**To learn more about this member benefit,
visit www.zipLogix.com/narbenefit.**

Mergers Create Mega REALTOR® MLS

Nine REALTOR®-owned MLSs in the Mid-Atlantic representing 43 REALTOR® associations are consolidating to form what is expected to become the largest REALTOR®-owned property listing system in the nation by the end of 2017.

The new service, Bright MLS, includes two large regional MLSs—Metropolitan Regional Information Systems Inc. (MRIS) and the Delaware Valley Real Estate Information Network Inc. (TREND)—and other association MLSs representing parts of six states and Washington, D.C.

“The creation of this new organization is a direct response to [subscriber] demands that the MLS break down market barriers and provide real estate professionals with expanded property information that exceeds

what consumers can get from publicly available websites,” TREND MLS said in a statement.

“Most of our brokers operate across multiple marketplaces and their level of frustration with multiple data feeds, rules and regulations, and costs was increasing,” says Kathleen Ludwig, CEO of the 1,650-member Greater Harrisburg Association of REALTORS®, Pa.

From the very beginning of consolidation talks, TREND and MRIS created a culture that was inclusive and open, involving all stakeholders to have an active role in building the new venture, explains Ludwig.

Even though her association will no longer operate its own MLS, Ludwig isn't worried. “Bright MLS offered various financial ben-

efits to local associations that were willing to make a change,” she says. “We offer our members many benefits in addition to the MLS and we will continue to offer those benefits and services and seek additional ways to serve our members.”

Bright MLS expects to have 85,000 REALTOR® and broker members, according to its website, which would make it the largest MLS in the country, just slightly more than the California Regional MLS, which has 80,000 subscribers.

Tom Phillips, previously president and CEO of TREND MLS, is the new president and CEO of Bright MLS. David Charron, previously the president and CEO of MRIS, will serve as Chief Strategy Officer of Bright MLS.



NAR Patent Liability Insurance to Cover Local and State Associations, MLSs

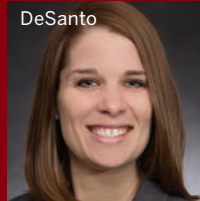
To protect REALTOR® associations and their MLSs from patent litigation risk, one of the costliest forms of business risk today, the National Association of REALTORS® has added limited patent liability insurance to the NAR Insurance Program for associations and MLSs. The coverage, provided at no cost to associations, reimburses up to \$50,000 in expenses to resolve patent liti-

gation, both legal and settlement, including a \$25,000 per claim retention. There is no sign up; all qualified REALTOR® associations and REALTOR®-owned MLSs are automatically covered.

Associations may increase coverage levels by purchasing excess insurance online at nar.aon.com. For more, contact Finley Maxson, 312-329-8381, fmaxson@realtors.org.

2017 AE Leaders of Tomorrow

Maranda DeSanto, RCE, of the Duluth Area Association, Minn., and Ruth Hackney, RCE, of the Missoula County



DeSanto



Hackney

Association, Mont., will be honored at the AE Institute in March as the 2017 recipients of the AE Leaders of Tomorrow Young Professionals Award. This annual award recognizes AE young professionals who have fostered greater involvement and increased professionalism among their AE YPN peers.



NAR and Trust Stamp Work to Keep REALTORS® Safe With New Identity Verification Tool

The National Association of REALTORS®, through an investment by its venture capital fund Second Century Ventures, now provides members with an identity authentication service. Trust Stamp uses patented software to analyze hundreds of public records and social data to quickly provide reliable identification verification for real estate professionals meeting new clients or unknown individuals.

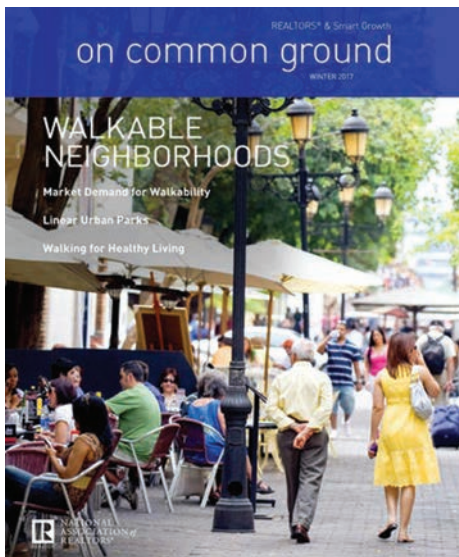
“Investing in a fast, convenient, and affordable tool like Trust Stamp to establish the identity and trustworthiness of a stranger will help REALTORS® stay safe and protect clients and their home or property,” said NAR president William E. Brown.

Through a program exclusively for NAR members and requiring a NRDS number to log in, Trust Stamp provides a real

estate-specific webpage and mobile app. REALTORS® enter an individual’s email address or cell phone number in the tool that then invites the person to make a Trust Stamp profile online. It takes only a few minutes for clients to create a basic profile with a photo of their driver’s license, a selfie, and links to one or more social accounts, such as Facebook. When the process is completed REALTORS® receive notice with an individual’s verified name, photo, and “trustworthiness score.”

NAR members can create their own Trust Stamp profiles for free, but they have to pay to view Trust Stamps from prospective clients. NAR’s investment in Trust Stamp means REALTORS® pay a lower fee than subscribers in other industries.

Access Trust Stamp at truststamp.net/re.



On Common Ground, the National Association of REALTORS®’ free, semi-annual magazine presenting a wide range of views on smart growth issues, with the goal of encouraging dialogue among REALTORS®, elected officials, and other interested citizens, is now available as a mobile app for Apple and Android.

Changes to Placemaking Grant Program

REALTOR® Associations have used tens of thousands of dollars in NAR funding through the Placemaking Grant program to build, beautify, and protect public spaces.

Communities that offer a variety of public spaces—pocket parks, trails, pedestrian plazas, and community garden—are often more desirable making them better places to live and buy a home.

The Placemaking Grant requirements

have changed in 2017 so that the grants can now be used only to fund the creation and building of new public spaces, rather than adding amenities to an existing space. The grant program is focused on projects that will have a bigger impact on a community by building gathering spots; creating destinations; bringing life to downtowns; and preserving open spaces.

For more, visit realtoractioncenter.com and search for “Placemaking Guide.”

Associations Benefit From Having a Good Neighbor

Winning a national award is a great source of pride for any REALTOR®, but it can also be rewarding for the winner's local and state association. The Good Neighbor Awards, which recognize 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. And local associations take pride in having nominated and supported someone who does so much to help others in the community.

The Minnesota Area Association of REALTORS®, which has had four national Good Neighbor Award winners in recent years, saw so much benefit that it was inspired to create its own state program recognizing REALTORS® for community service. "We value that our members are involved in the community—even

when it doesn't have anything to do with housing. Our leadership sees the value, too," says Donnie Brown, MAAR's vice president of community affairs and foundation. "It tells our members that we're interested in knowing what they do beyond the transaction."

Brown says she sees concrete evidence of how members support their colleagues' volunteer work in how they react when she posts stories about the REALTORS® who have won MAAR's Heart of the Community Award or NAR's Good Neighbor Award. "These stories give us the best social media engagement of the year," says Brown. "We get an average of 3,000 interactions, as opposed to maybe 100 for other posts."

Brown has also discovered that REALTORS® who are involved in community service are potential association leaders.

Good Neighbors' exposure from NAR is high profile: Winners are recognized annually during the REALTORS® Conference & Expo—as a centerpiece of the General Session. In addition, winners are featured in the November/December issue of REALTOR® Magazine. And a public voting component drew 42,000 votes last year.

An association that has a Good Neighbor Award winner enjoys inspiring content to share with members; national and hometown media coverage; a \$10,000 investment into a local nonprofit; and the potential to identify future leaders and to inspire members to get involved.

To read about past winners and nominate a member of your association, go to nar.realtor/gna. The deadline is May 12.

Questions? Contact Sara Geimer, sgeimer@realtors.org, 773-459-6627.

**2017
ENTRY
DEADLINE
MAY 12**

REALTOR® Cindy Barrett and her volunteers have repaired more than 800 homes for people in need—for free. **Cindy is a Good Neighbor.**

REALTOR MAGAZINE'S
GOOD NEIGHBOR AWARDS

Do You Know a Good Neighbor?

Winners of REALTOR® Magazine's Good Neighbor Award receive a \$10,000 grant for their charity.

To nominate a REALTOR®, go to nar.realtor/gna or call 800-874-6500.

REALTOR® Magazine thanks Good Neighbor Awards program sponsors realtor.com® and Wells Fargo Home Mortgage.

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Time Is Right for a Consumer-Focused Housing Fair

The Northern Virginia Association of REALTORS® expects to welcome 300 to 400 consumers at its April Housing Fair, a first for the organization. The event, to be held at the association's headquarters, will feature sessions on home buying, lending tools, affordable housing, and sustainable housing, as well as an overview of the Northern Virginia real estate market and a special focus on veterans' housing opportunities.

AE Committee Sets 2017 Objectives

In addition to the goals set forth by the AE Committee's various advisory boards and workgroups (including the REALTOR® AE magazine editorial board), the committee will focus on four special initiatives this year.

The **first** is developing tools, including templates and sample materials, associations can use to conduct live or online orientations for members who are new to an association board of directors. The **second** goal is to develop materials that will help associations create job descriptions for staff specialty areas, such as member services, education, and communications. The **third** initiative is intended to identify ways state and local associations can collaborate, resulting in less duplication of effort and greater efficiencies. The **fourth** goal is to update the AE Competencies and RCE Body of Knowledge document that serves as the foundation for all AEC professional development courses and the RCE exam. Attend the AE Committee meetings at NAR conferences for updates on the progress toward these goals.



See You at the AE Institute in Denver!

No AE should miss the AE Institute, the annual event that delivers real estate industry insights and provides a wide range of education designed to help AEs across the country better serve their members. AEI offers fundamentals of REALTOR® association management, REALTOR® Party updates, enhanced and in-depth MLS programming, and Core Standards implementation.

The 2017 conference kicks off Saturday, March 18, with a keynote address from Joe Moglia, an executive leadership speaker who honed his message of the four pillars of success through his own trials as a business leader and football coach. 2017 NAR President William E. Brown will also present.

The curriculum is divided into these three tracks this year: customer service; peer-to-peer game changers, featuring what your peers are doing across the country to remain innovative and member-focused; and technology and communications, which will also include a look at the changing role of MLSs in the

real estate marketplace and association operations.

Back by popular demand is the CEO Program (\$300, but sold out) featuring the Disney Institute with a focus on leadership excellence, building collaborative cultures, and quality service.

On Monday, stick around for a special session, "Power Skills for Success: How Top AEs Perform at Higher Levels," with Jerry Matthews (see p. 18).

AEI also offers opportunities (for additional fees) that count toward earning certifications and designations, including the Certified International Property Specialist, e-PRO®, REALTOR® Certified association Executive, and Certified Professional Standards Administration.

Social events this year include the AE Young Professional Network (YPN) Meet Up, the New AE Networking Reception, the RPAC Major Investor Reception, and the Icebreaker Reception.

Visit the AE Institute online at nar.realtor/aei to download the full event brochure and mobile app.



Congratulations New RCEs

These 28 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. Visit nar.realtor/rce.



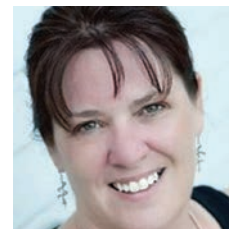
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Suzanne Close, RCE,
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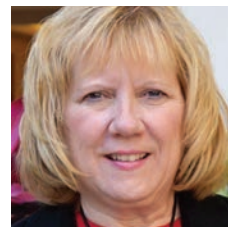
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Hawaii Island REALTORS®



Dawn Crawford, RCE, West Maricopa County Regional Assoc. of REALTORS®, Ariz.



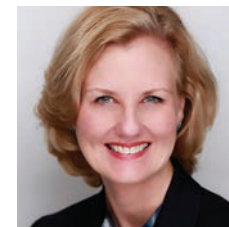
Allison Fitch-Markham, RCE, National Association of REALTORS®



Deb Frazier, RCE, REALTORS® Association of Southwestern Illinois



Barbara Gilliland, RCE, Greensboro Regional REALTORS®, N.C.



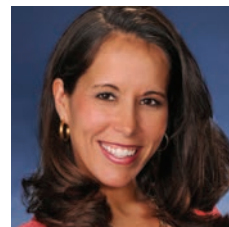
Roxie Glenn, RCE, MetroTex Association of REALTORS®, Texas



Char Glocke, RCE, LaCrosse Area REALTORS® Association, Wis.



Kristen Gulson, RCE, REALTOR® Association of the Sioux Empire, S.D.



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Deb Hernandez, RCE, Texas Association of REALTORS®



Jon Houser, RCE, Texas Association of REALTORS®



Susy Hurlbert, RCE, Eastern Connecticut Association of REALTORS®



Norma Jayne, RCE, Ithaca Board of REALTORS®, N.Y.



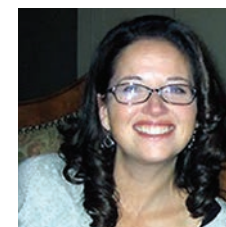
Tim Johnson, RCE, Southland Regional Association of REALTORS®, Calif.



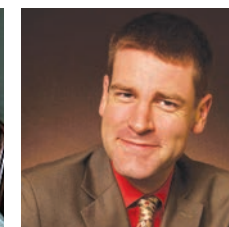
Thomas Larson, RCE, CAE, Wisconsin REALTORS® Association



Lori Levy, RCE, Texas Association of REALTORS®



Kelly Muehlberger, RCE, Kansas City Regional Association of REALTORS®



Christopher Nave, RCE, Outer Banks Association of REALTORS®, N.C.



Allan Nielsen, RCE, Triangle MLS Inc., N.C.



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Christina Smalls, RCE, Arizona Association of REALTORS®



Michael Theo, RCE, CAE, Wisconsin REALTORS® Association

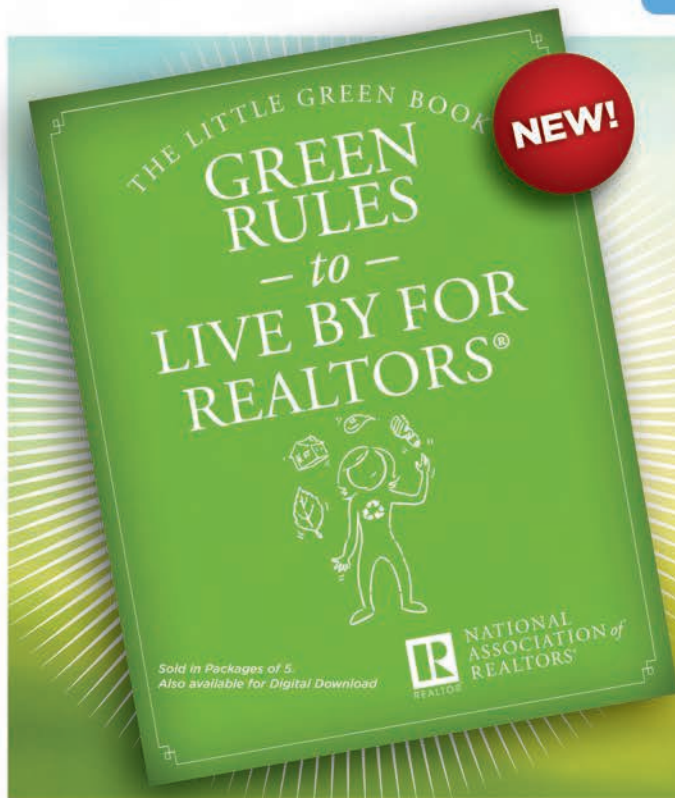


Bill Wald, RCE, CAE, Minneapolis Area Association of REALTORS®, Minn.



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BRAND NEW
TITLES FROM THE



The Little Green Book: Green Rules to Live By For REALTORS®

This is your must-have guide to sustainability do's and don'ts, promoting the cost-savings of energy efficient homes and incorporating green practices into your every day business.

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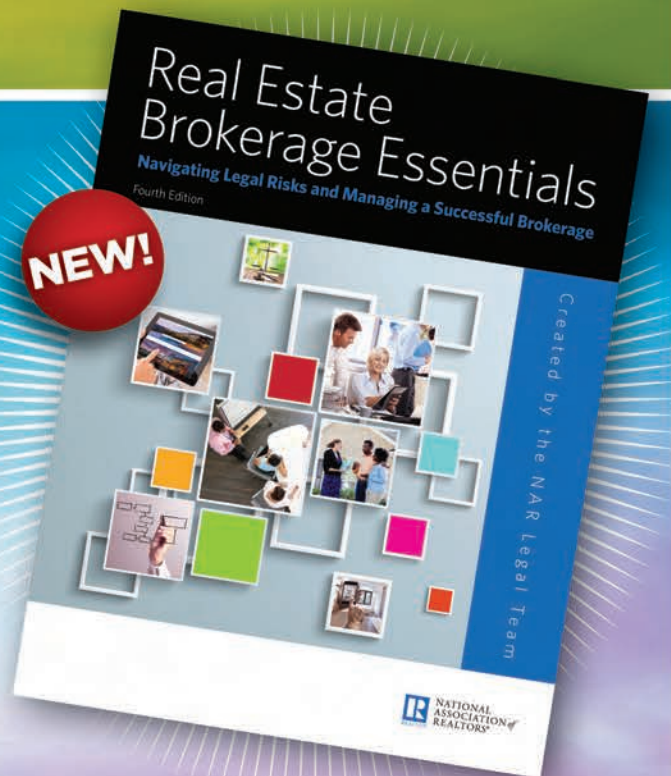
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Real Estate Brokerage Essentials: Navigating Legal Risks and Managing a Successful Brokerage

Get the most comprehensive business tool for any brokerage looking to minimize its risk of legal liability.

This product was created by NAR's Legal Team and includes a foreword by NAR Chief Legal Counsel Katie Johnson.

Utilize new content on REALTOR® safety and data security, drones, teams, social media and more!

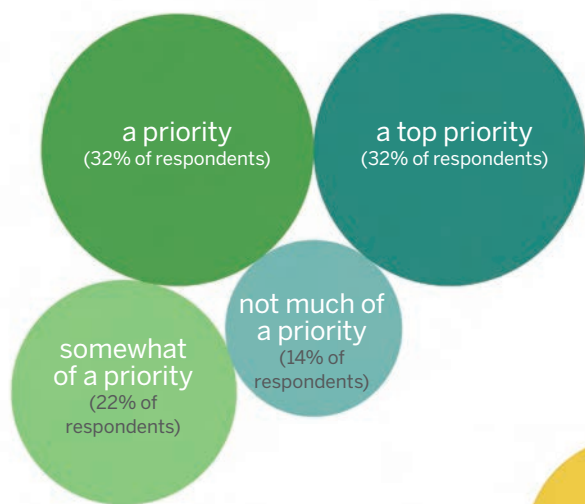


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Need More Nondues Revenue?

The results of REALTOR® AE magazine's December nondues revenue survey indicate that making money to fund association operations, programs, and events is increasingly important. Not only did most respondents say generating revenue is a priority at their REALTOR® association, but comments indicate that efforts to find more revenue streams are growing. Several survey respondents said decreasing income from education offerings, both CE and non-CE, is prompting a fresh look at generating revenue from other sources and from outside the REALTOR® organization.

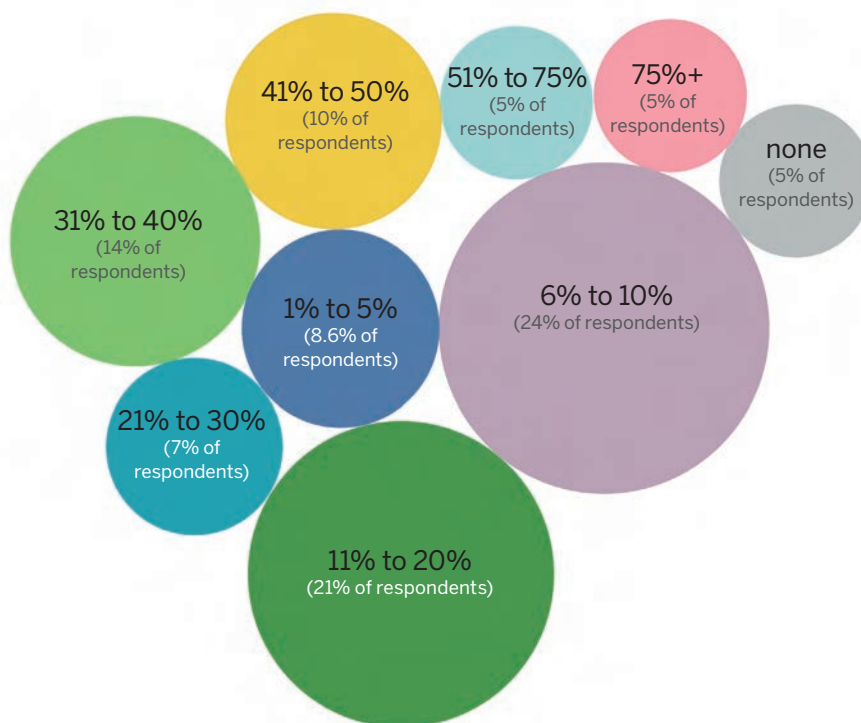


How important is generating nondues revenue?

64% of survey respondents indicate that generating nondues revenue is a top priority or a priority. No respondents indicated that generating nondues revenue was not a priority.

What percentage of operating budget comes from nondues revenue?

The largest percentage of respondents report nondues revenue makes up 6% to 10% of their annual budget.

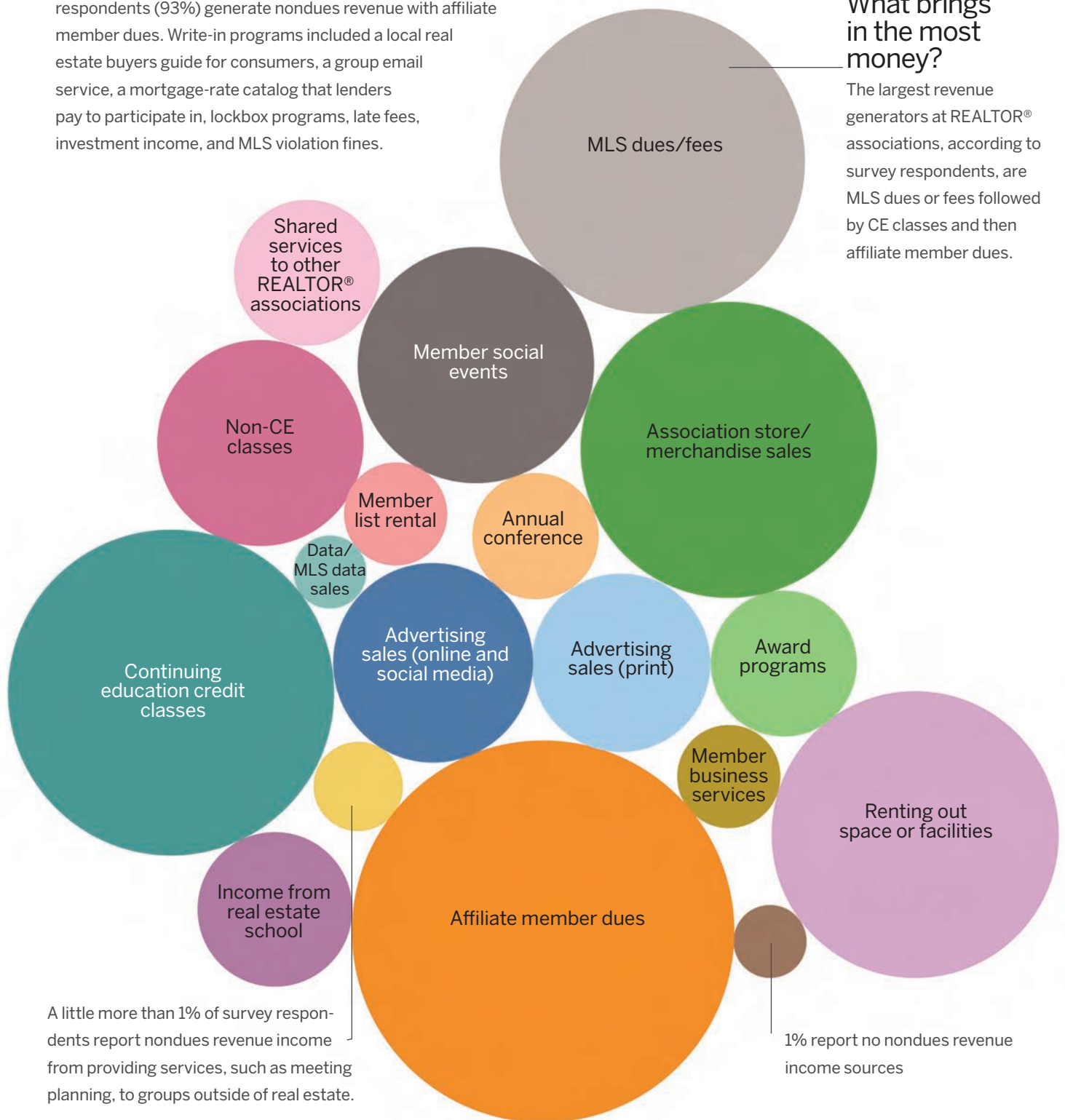


How do REALTOR® associations generate nondues revenue?

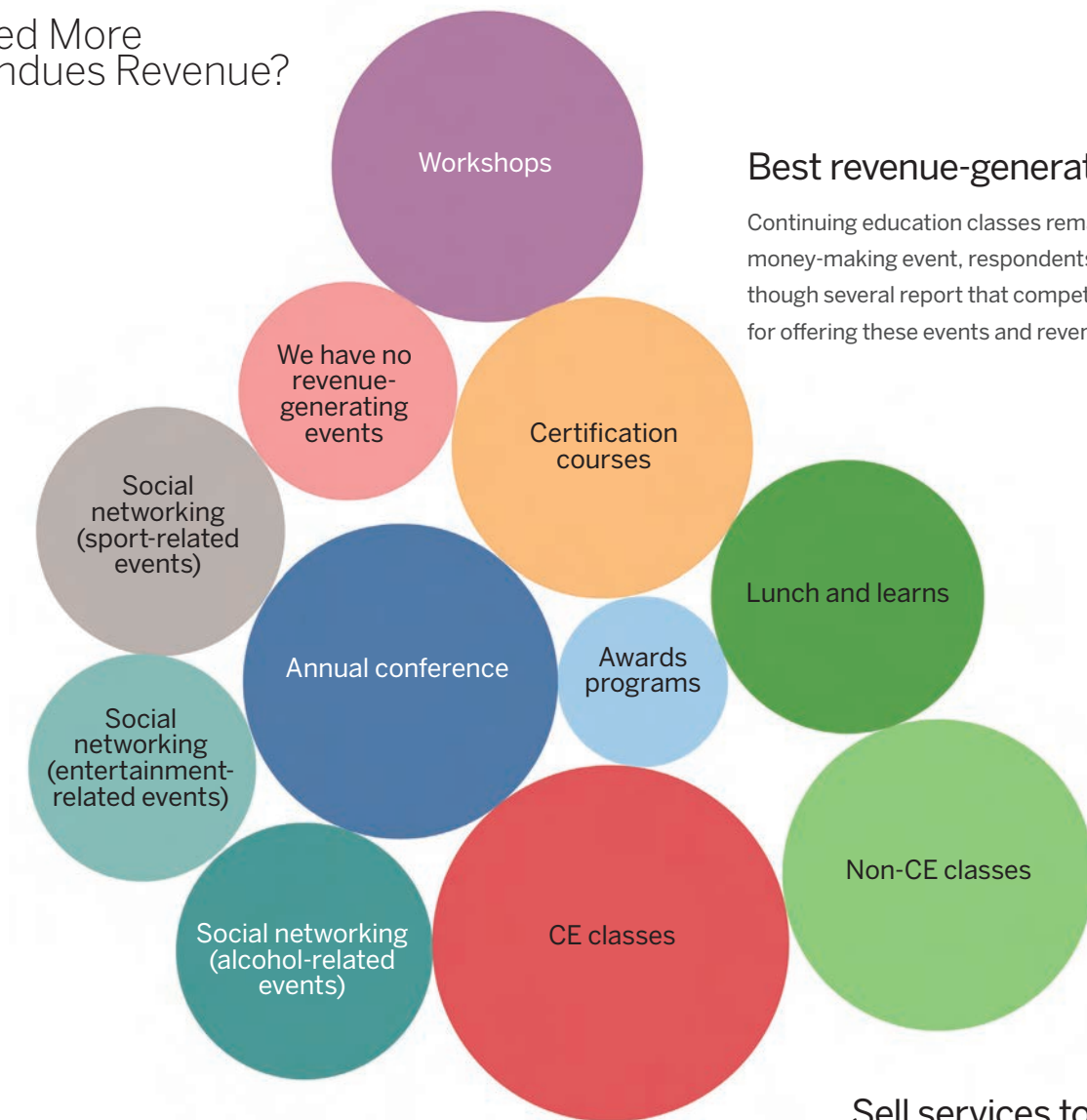
Survey participants were asked to select which of these 17 nondues revenue-generating programs they participate in and write in any programs not listed. Most respondents (93%) generate nondues revenue with affiliate member dues. Write-in programs included a local real estate buyers guide for consumers, a group email service, a mortgage-rate catalog that lenders pay to participate in, lockbox programs, late fees, investment income, and MLS violation fines.

What brings in the most money?

The largest revenue generators at REALTOR® associations, according to survey respondents, are MLS dues or fees followed by CE classes and then affiliate member dues.



Need More Nondues Revenue?

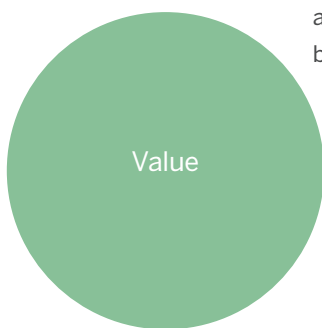


Best revenue-generating events

Continuing education classes remain the top money-making event, respondents said, even though several report that competition is growing for offering these events and revenue is dipping.

What members say they would pay for

Most respondents (43%) say they have never surveyed members about what types of products, events, or services they would pay for. Nearly the same number (40%) have asked members, and the most common response was that members wanted more free classes and events. One respondent wrote: "Leadership at our



association has always felt that members should get significantly more for their dues than is possible to give them." Other respondents said their member surveys showed REALTORS® would be willing to pay for shorter and higher-quality CE classes, more networking events, and technology classes.

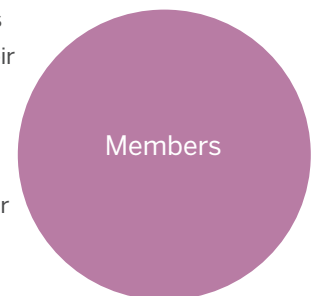
Sell services to consumers

Less than 2% of respondents said they provided services to consumers for a fee, such as homeowner fairs or home improvement classes.



Where ideas come from

76% of respondents said they involve their Board of Directors in generating ideas for new nondues revenue programs or projects.



Revenue-generating programs that fell short

Not every attempt to generate revenue succeeds. Survey participants were asked to describe a program or event that they expected would generate nondues revenue but didn't.

"We scheduled our CE classes to partially overlap, which did not work for most members who wanted to attend both."

"Designation class failed to attract attendees. Members are too busy to take the time to learn more."

"Our trade show sunk because the location was not geographically convenient for everyone."

"Our social comedy night fell though because members were just not interested in attending the event."

"Any time we had a program that failed to provide a return, it's because the committee or leadership team organizing the event didn't give it their all. There is only so much that staff can do to contribute to the success of any event. It takes strong volunteer leaders to help make it a hit."

"We had a clothing bin drop-off at our office for a short period of time and promoted it to members. It was supposed to generate a few of hundred dollars a month [from a local second-hand store], but after a few months they removed it because there were hardly any drop-offs."

"An affinity program with a closing gift provider ended up having a setup cost that was too expensive, plus the leadership felt they could get equal or better quality items for less on other websites or on Amazon."

"Our CE classes do not return as much as we would like. There is just so much you can charge for a class, and competition with other sources is tight."

"Darn near every affinity relationship we partnered with has failed. They take constant marketing and training in some cases, and we don't have the staff to support the extra work."

"Our store is provided more as a member benefit than a real revenue generator."

"Non-CE classes have been a disappointment, as has rental of our classroom to members and affiliates. Just not much response to either."

"CE agents are going online and not paying for classroom CE."



Sponsor Opportunities

From tote bags to conference center charging stations, the opportunities for sponsors to participate in your events and communications are limitless. In exchange for recognition, access to members, and marketing opportunities, sponsors can help you fund a wide range of events, programs, and products.

Selling Sponsorships

Is your association missing out on generating nondues revenue?

The number of companies paying to sponsor events held by the San Mateo County Association of REALTORS® has increased each year since 2010, says Dalen Gilbrech, the association's lead visual designer who also manages sponsorships. The 2,600-member association had 32 individual sponsor companies last year, including mortgage banks, lenders, and home inspectors. Gilbrech is aiming for more not only to help fund and grow its events but also to build other association programs.

The money is out there, associations say, at companies eager to buy the opportunity to build business relationships with REALTORS®. The challenge is developing an easy-to-manage program to attract sponsors and deliver value to them in exchange for their funding.

What do sponsors want from associations?

The value of a sponsorship comes from the relationships it facilitates. Sponsorship opportunities that provide in-person engagement with members are the most in demand, associations say.

At the 4,000-member Boise Regional REALTORS® in Idaho, sponsorship offerings have evolved to provide more opportunities for backers to engage with members, says Shari Fernandez, the association's director of communications. "We tailor our partnership packages to give sponsors time in front of members at all four of our major annual events. We also offer an education partnership package, which provides speaking opportunities at our classes throughout the year." Affiliate members pay \$1,000 to \$8,500 for these annual partnership packages, which include free tickets to events, logos on signage, promotional materials in classrooms, and a host of other perks, she said.

The Boise Regional REALTORS® generated roughly \$90,000 from its 50 affiliate-member sponsors in 2016, which was up from previous years, says Fernandez.

"What sponsors want most are two things: advertising in our monthly print newsletter and face time,"

says Jean Sawtelle, communications director at the 2,600-member Plymouth and South Shore Association of REALTORS® in Massachusetts. "We have a new member orientation every other month where we invite our sponsors, who pay for the luncheon, to staff information tables and speak at the podium for a few minutes each." Sponsors, which are affiliate members, include banks and lenders, cleaning services, insurance agencies, and inspection services.

Sawtelle surveys the association's sponsors and tweaks the contents of her sponsor packages according to what affiliates find most valuable. "I also drop features that turn out to be taxing for me and not well-received by the sponsors," she says. "I thought sponsors would like a monthly social media post, but it turned out to be too much work to solicit posts from them, and they didn't see the value in it."

Sponsors at the 800-member Outer Banks Association of REALTORS® in North Carolina most appreciate making live presentations to the membership, says Karen Pierce, membership and marketing director. But the association also offers other ways for sponsors to get their company name in front of the membership, including web ads, social media posts, banners with logos, presentation opportunities, and golf teams, she says.

Besides face time with members, recognition is a key element of any sponsor package, association representatives say.

"We provide exposure and acknowledgment, which costs the association very little," says Gilbrech. "Most of our recurring annual sponsors are mortgage banks, including credit unions, but we also have real estate offices and property managers, moving companies, painters, media, and our local MLS, which is a separate organization in our market. Sponsors like seeing their logo up on the screen at our monthly meetings and in our office lobby."

"The Plymouth and South Shore Association recognizes sponsors at every event, says Sawtelle. "We

In-person time with members is the benefit that sponsors want most.



Association sponsor program brochures from REALTOR® associations.

make sure that our members know that our sponsors, not dues dollars, pay for events, and we make a point to thank our sponsors every time. I reiterate to members that it is because of the sponsors that our events are possible.”

Meghan Weinreich, communication director at the Charleston REALTORS® in South Carolina, cautions associations to avoid allowing events or programs to become too focused on sponsor visibility or sales pitches. “Over time you’ll find the right balance, where partners communicate with members on the value of the services they provide and members feel it’s a benefit.”

“We make sure that our members know that our sponsors, not dues dollars, pay for events, and we make a point to thank our sponsors every time.”

—Jean Sawtelle, Plymouth and South Shore Association of REALTORS®, Mass.

In addition to underwriting a cocktail reception, industry companies are eager to participate in the association in a meaningful way, says Julie Carriger, events and sponsorships director at the 1,500-member Fredericksburg Area Association of REALTORS® in Virginia, which brought in more than \$100,000 in sponsorships last year. Sponsors, who are all affiliate members, can sit on the events committee, the education committee, and the community service committee. The association recently voted to set aside one affiliate member’s seat

on the board of directors.

“One of the main things I tell sponsors when I’m selling them sponsor packages is that the value won’t come through logos and advertising,” says Carriger. “Relationship building will come only when members recognize sponsor involvement in the association, at events, and on committees.”

How to cut down on the work of attracting and managing sponsors

“Before I came on board here, staff members were scrambling to chase sponsors

for each event,” says Sawtelle, “so they never knew how much money they would have going into an event, and they spent a lot of time that could have been focused on organizing the event itself.” Sawtelle established a program to sell annual sponsorship packages with an incentive to sign up in January so the association had the money up front and had less work throughout the year.

“Our annual sponsor packages sell out and have been extremely successful in part because of the exclusivity,” says Sawtelle. “I offer 20 packages at most and it’s first come, first served. I send the offer out to all the affiliates at the same time, and I limit how many companies can buy at each level.”

Sponsorship packages are convenient for the association, but the sponsors appreciate them too, says Pierce. “We tried selling event sponsorships separately as à la carte options, but it failed,” says Pierce. Having to repeatedly ask their corporate offices for funds defeated the purpose of the program, sponsors told Pierce.

Although sponsors like the convenience of a package of benefits, be flexible in building sponsorship packages, says Fernandez. “Not all sponsors want or need all the things you are offering, so give them the ability to make the sponsorship work for their needs and their budget.” Last year, only 14 of the association’s 50 sponsors choose the annual sponsorship package option, she said.

To cut down on the work of managing sponsorships, Pierce sells annual sponsorship packages just at the beginning of the year. The association sells discounted sponsorships year-round.

“I also would limit selling one-off event sponsorships

“As new technologies and communications vehicles become available to our association, we always keep in mind how we can expand sponsor recognition.”

— Dalen Gilbrech, San Mateo County Association of REALTORS®, Calif.

to companies that are nonsponsors, those that have not signed onto one of your sponsor packages,” advises Pierce. “It’s a fine line to walk with promoting your year-round sponsors and one-time sponsors.”

Deliver value for the investment

“As new technologies and communications vehicles become available to our association, we always keep in mind how we can expand sponsor recognition, which helps keep our sponsorship program strong year after year and provides existing sponsors with an increasing sense of value,” says Gilbrech. “It’s important to make sponsors feel special with a ‘high touch’ approach, including direct outreach from staff, ideally interacting with the same dedicated staff person.”

One consistent result of Sawtelle’s annual sponsor survey is that sponsors appreciate frequent reminders on how and when to take advantage of the package features.

Sawtelle also recommends that associations not underestimate the value of having a thorough, well-designed, and easy-to-understand sponsor brochure or webpage.

Attracting sponsors, coordinating the benefits, and managing the relationships can feel like a job in itself, yet the work is most often absorbed by association marketing, membership, communication, or finance staff, or the AE.

Pierce, at the Outer Banks Association of REALTORS®, says at least 25 percent of

her job is selling sponsorships and managing sponsors.

In Boise, Fernandez manages the sponsor packages but also enlists the association’s event planning committees to secure event sponsorship.

At San Mateo County, association staff manage all sponsorship customer management and solicitations in-house, says Gilbrech. “All staff are generally familiar with sponsor benefits and who our sponsors are, which helps with solicitations and providing exceptional customer service.”

Sponsorship programs are not out of reach for the small or single-staff association, says Carriger. “I would start with finding one local mortgage company, maybe a new company or one wanting to push its name. Then maybe a title company that works with that mortgage company will sign up, and your sponsor program will grow from there.”

“I would encourage anyone developing a sponsor program to take it in stages,” says Weinreich, who says the Charleston REALTORS® had its most successful year for sponsors in 2016, collecting nearly \$100,000. “You don’t have to offer everything the first year. Poll your current affiliates or partners and learn what is valuable to them. You’ll also want to ensure that your members find the connections to these companies meaningful and valuable; it definitely needs to be a reciprocal relationship.”

By Carolyn Schwaar

5 Tips for Selling Association Sponsorships

1. Be clear about what you’re selling: access to members. The Fredericksburg Area Association of REALTORS® boasts its program provides companies “unparalleled opportunity to directly market and advertise to our more than 1,500 real estate professionals, managers, brokers, and owners.”
2. Have clear and detailed sponsor materials. Printed and electronic sponsor marketing materials should clearly list what sponsorship opportunities are available and at what price. Always have sponsors sign a written agreement detailing the arrangement.
3. Build relationships by reaching out to potential sponsors in person. Solicit members to help identify potential sponsors or sell sponsorships. Don’t forget to follow up with sponsors regularly to ensure that they’re getting value for their investment and adjust the sponsor program when necessary.
4. Don’t sell sponsorships to everyone; choose relevant companies that members are interested in. “Ensure that your members find the connections to these companies meaningful and valuable; it definitely needs to be a reciprocal relationship,” says Meghan Weinreich, communications director at the Charleston REALTORS® in South Carolina.
5. Be on the lookout for new ways sponsors can reach members. As new programs and products develop, always offer your existing sponsors the right of first refusal on the opportunity to sponsor, then seek out new companies.

Power Skills for CEO Success

Why are some CEOs successful and others not? Even though two executives have substantially equivalent experience, education, and environments, one is often more successful. How can that be?

by Jerry Matthews



I have been curious about executive success skills my entire career. This increasing curiosity recently drove me to try to identify the unique abilities that ensure CEO success. (Finding these elusive qualities would not just answer my personal lingering question; it would enable me to be a more effective CEO consultant helping AEs navigate their career and organizational change.) So for the past two years I have focused on this task and have some enlightening results to share.

A Theory About Success

I first noticed a difference between successful and unsuccessful CEOs in similar situations when I was CEO of two large state REALTOR® associations. I worked with dozens of local and state CEOs to help them with challenges such as a rogue officer or failing services. What I found was that standard management techniques such as writing officer job descriptions or conducting service surveys rarely led to success, but relationships and creativity often did. For example, a disruptive officer could not be assuaged through a new job description. Nor could a failing service be helped by more information. However, for another CEO with the same challenges, the solution was personal discussions and ingenuity.

There seem to be two categories of skills: tangible and intangible. Tangible skills include financial control and human resource management. Intangible skills include building relationships, communicating effectively, and leadership.

Later, in more than a dozen years as a consultant, “success skills” became even clearer. I not only coach CEOs, I recruit them. When association search committees define the essential criteria they want in a new CEO, the first focus is always on intangible talents.

My experience in CEO career coaching is that the tough challenges are almost always intangible. Issues such as relationships, trust, and influence are the leading categories. It is rare that a tangible issue arises.

Years of observation and experience led me to theorize that intangible skills determine executive success, so I set out to collect the proof and catalog the details that may help more CEOs to identify and develop these skills.

Research Surveys

I decided to test the premise of the impact of intangible

skills through direct research. I sent a survey to all local and state REALTOR® association CEOs and asked them to identify fellow REALTOR® CEOs whom they considered successful and to list the characteristics that enabled those CEOs to perform. (The response was an open box so they could enter anything they wanted, rather than choose from a predetermined list.)

The AE survey respondents repeatedly identified the same 15 REALTOR® CEOs as the most successful. Although most were seasoned AEs, there were some early-career AEs, as well. But as I discovered in later interviews, the nature of intangible skills does not necessarily require years of service.

Personal Interviews

After analyzing the surveys, I conducted personal interviews of the REALTOR® CEOs most often named as successful. The interviews, conducted at NAR meetings, were confidential and took more than a year to complete. I asked these CEOs why they thought they were successful, what they thought their REALTOR® leaders would say were their success skills, and what they identified as the key skills of other successful CEOs.

Surprisingly, most successful CEOs do not see themselves as that much more talented than competent CEOs. Most were amazed that their peers had such a high opinion of them.

The AE survey respondents repeatedly identified the same **15** REALTOR® CEOs as the most successful.

Next, I interviewed REALTOR® association presidents and past presidents of the successful CEOs, asking them to describe their CEO’s abilities. Interestingly, at the conclusion of these interviews, many REALTOR® leaders—after listing a particular skill of their CEO—often remarked that their CEO sincerely cared for the members or the philosophy of property ownership as a component of the skill. For example, when a CEO was said to be innovative, the leader would attribute that skill in part

The **25** different skills mentioned in the survey were narrowed to **10** after combining similar skills, and further narrowed to **5** skill pairs—skills that require the same ability but can be exhibited differently by two CEOs.

Meet the Top AEs at AEI Session

Join Jerry Matthews and several of the successful AEs his survey identified, including NAR CEO Dale Stinton, at the 2017 Association Executives Institute session, "Power Skills for Success: How Top AEs Perform at Higher Levels," Monday, March 20, 7:30 a.m.–1:00 p.m.

to the CEO's personal enthusiasm for the association.

Intangibles Are Key

In an overwhelming confirmation of observations and experience, the success skills stated were intangible in all cases. If tangible skills were mentioned at all, it was as an assumed capability, such as controlling the budget or managing the staff. After working with hundreds of association CEOs as a peer and an independent consultant and through conducting recent research, it is clear to me that success depends on intangible abilities rather than tangible ones.

Skills for Success

Then came the interesting part. In analyzing the survey and interview data, there were about 25 different skills mentioned, but on further review and after combining similar skills, there were actually only about 10. Skills such as vision, communication, and passion made the final list.

Some similar skills are "mirror images" of others. That is, the same skill can be exhibited by two CEOs in a different manner, but they essentially require the same ability. The way skills are deployed depends on the CEO's personality or style. As an example, "leadership" and "influence" have the same essence and effect, yet they can be exhibited differently by two CEOs.

So the 10 intangible skills are actually five "skill

pairs." This explains how CEOs with very different personalities can be highly successful using the same core intangible skill.

The identification of the core intangible skills is just the beginning of further revelations in application and symbiotic relationships. For instance, further analysis reveals each skill pair has its own subdefinitions, such as "effort," "style," and "vehicle."

Curiosity Satisfied

My decades-long question has been answered. Highly successful CEOs are more than just competent; they have intangible skills that set them apart and allow them to excel. Peers and REALTOR® leaders recognize and appreciate these skills.

What are these five intangible skills exactly? I will reveal these and more in my session the 2017 AE Institute (Power Skills for Success, Monday, March 20, 7:30 a.m.–1 p.m.), and in future issues of this magazine, I will detail ways you can recognize and cultivate these skills to further your AE career.



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

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Ride the Wave of Advocacy Action

Give members real estate-focused, constructive outlets for their political energy.

Whether you think the presidential election will unify or divide the nation, it certainly has sparked interest in politics. More ordinary citizens are looking for ways to get involved and make a difference. This is a great chance for your organization to give members that opportunity.

Under the Core Standards requirements, your association must conduct six advocacy activities under three categories: vote, act, and invest. Associations must conduct two "vote" activities, such as encouraging members to register to vote or to vote on a particular ballot initiative; two "act" activities, such as organizing an association visit with local or state elected officials or launching a campaign to support or defeat a piece of legislation; and two "invest" activities, such as holding an RPAC fundraising event or hosting an association RPAC phone bank.

Although there is a wealth of ideas online at the REALTOR® Action Center (realtoractioncenter.com), here are some of the most innovative and successful recent programs.

was a clear choice. As REALTOR® Champions go, there could hardly be a more obvious choice. He is active in NAR, RPAC, and CCAR and its Government Affairs committee. When John decided to run for office, the association was there to support him through its Independent Expenditure program. The association encouraged members to vote for Blom, fielded an intensive grassroots team that knocked on doors, and engaged in a major advertising campaign featuring a video it had produced about Blom. There's no doubt that Blom was elected to office because of the support of his fellow REALTORS®.



VOTE Candidate Campaign: REALTOR® John Blom for County Council

For the 1,700-member Clark County Association of REALTORS® in Washington state, supporting John Blom for county council



VOTE Providing Members with Informative Voting Guidance

Before the Nov. 8 general election, the Illinois Association of REALTORS® created a handy webpage detailing each pro-REALTOR® candidate the association was endorsing. The association encouraged members to check the reference page and vote accordingly. Local associations helped identify candidates and spread the word about the voting guide to members. The Mainstreet Organization of REALTORS®, for example, posted endorsements for incumbent state representative and REALTOR® Sam Yingling on its social media feeds,

member newsletters, and website. Yingling was among the 22 state candidates who received REALTOR® Party backing and won the election.



A C T Missouri Rallies Members to Fight for Ban on Sales Tax on Services

In the past seven years, no fewer than 12 pieces of legislation that could have led to a tax on services, including those provided by the real estate industry, were proposed in the state of Missouri. "The threat is real," says John Sebree, CEO of Missouri REALTORS®, whose organization has swatted back each one with the strong support of the National Association of REALTORS®. In 2016, it seized an opportunity to shift from a defensive to an offensive strategy. Its plan to amend the state constitution to ban a sales tax on services was ambitious and possibly unprecedented in the nation, but by appealing to members and the general public, first to get the referendum on the ballot and then to vote in its favor, the Missourians for Fair Taxation coalition found strength in numbers and won an important battle.

ACT

Amend Short-Term Rental Ordinance

Local laws restricting short-term rentals, sparked by the growth of companies such as Airbnb, have affected residential property owners nationwide. In Texas, the 120-member South Padre Island Board of REALTORS®, with help from the REALTOR® Party's Land Use Initiative, acted to overturn several provisions of a local ordinance that were unduly restrictive. With this single but significant action, the association gained new respect from the city, which now looks to the organization as the voice of real estate in the community.



contribute additional items needed for the battle, including shields (\$150 each), ammo (\$30 each), extra guns (\$40 each), and more. It's a fun and original way to encourage RPAC investments.

REALTORS® these past four years, it has been the means of attracting increasing levels of investment in the REALTORS® Political Action Committee—and an increasingly good time. What began as a modest event has exploded into a rollicking sold-out party

each November with eager sponsors (including a local brewery) and a waiting list to enter the friendly competition, which featured 30 chili teams and more than 360 hungry and discriminating chili "judges." By the end of the evening, ABR had raised more than \$20,000 for RPAC—\$5,000 beyond its goal.

This year could be a busy one for legislative and regulatory issues facing real estate on a local and state basis, giving you and your members plenty of opportunities to get involved. Stay on top of the current issues, such as sales tax on services, rent control, short-term rentals, property tax, and real estate transfer taxes at the REALTOR® Action Center.

Reporting by Tania Lee.

INVEST

Fun and Games RPAC Investing in Scottsdale

In the last two years, the Scottsdale Area Association of REALTORS® in Arizona has raised \$22,000 for RPAC with its Epic Water Battle, launched by its Young Professionals Network. RPAC investors can field teams of five players for the all-out water-gun battle for \$250. Teams are given a custom link they can share with fellow REALTORS® who can



INVEST

In Atlanta, Chili and RPAC Go Hand in Hand

Sometimes a great cup of chili is just a great cup of chili, but for the Atlanta Board of

Funding for Your VOTE•ACT•INVEST Activities

In November, the NAR Board of Directors approved grants to several state and local associations to support advocacy activities. The Puerto Rico Association of REALTORS® received \$35,000 to help it win repeal of a law imposing a sales tax on real estate services, and the Texas Association of REALTORS® received \$169,000 to help it win lower property taxes for home owners.

• **Issues Mobilization Grants**, part of NAR's Campaign Services, provide financial assistance to state and local REALTOR® associations to support effec-

tive advocacy campaigns on public policy issues, such as taxes, ordinances, and regulations, that affect REALTOR® interests. These grants may be used to fund your Core Standards "Vote" or "Act" advocacy activities. State and local REALTOR® associations must complete and submit an Issues Mobilization Grant Application.

• **Smart Growth Grants** provide financial assistance to state and local REALTOR® associations to participate in early-stage land use policy and/or transportation change efforts that foster development aligned with NAR's smart growth

principles. A smart growth activity may qualify as an "Act" activity if it includes supporting or opposing a related piece of legislation or regulations.

• **RPAC Fundraising Grants for State & Local Associations** can help increase RPAC receipts and participation by applying for grants up to \$5,000 annually (subject to state law). Use this grant to help fund special RPAC fundraising events and activities. This program is limited to states with election laws that do not ban the use of corporate political contributions for use in fundraising.

Global Outreach for Any Size Association

How to find your market's international appeal.

International real estate buyers and investors enhance REALTOR® profitability, boost markets, and expand the economy. In Miami, for example, foreign investment helped our market recover much faster and stronger than anyone expected from the 2006 downturn. The top three countries that invest in South Florida are Venezuela, Argentina, and Brazil. Foreign sales account for 24 percent of total unit sales and 39 percent of total dollar volume in our market.

All REALTOR® associations, regardless of size, market, and resources, can have successful international programs. Our association, the 45,000-member Miami Association of REALTORS®, is currently the largest local REALTOR® association in the nation, but our CEO, Teresa King Kinney, launched our international council nearly 25 years ago when we were 90 percent smaller. We have expanded our efforts considerably over the years but are still doing many of the things we did then, including hosting events and international education, conducting market research, and offering tools and resources to members and the media. Even though we have about 2,000 members in the council, most

REALTORS® do international business on some level. (There are more than 110 global business councils at REALTOR® associations nationwide.)

Power of Partnerships

Relationships are key to developing an international presence. Although mobile devices, social media, and other technological advances enhance our connectivity and have changed the dynamics of communication, relationships remain crucial for all business endeavors, particularly when it comes to global business.

We have many valued partners throughout the world whom we've met at international conferences or were introduced to by another partner or organization. Sometimes members put us in touch with organizations overseas, and sometimes foreign groups and brokerages reach out to us. These partnerships help us generate significant business opportunities for our members. For example, foreign buyers purchased \$6.2 billion worth of property in our market from August 2015 to July 2016, up from \$6.1 billion the year before. Partnerships are

also a great way to build your association's global reputation, which will further attract prospective partners and opportunities.

Identifying New Markets

To find the best international partner markets, determine who is already interested or buying in your area. Find out whether there are any foreign companies or industries doing business in your market. For example, the BMW auto plant (the largest in the world) located 20 miles from Greenville, N.C., announced a \$1 billion expansion in 2016 that will likely boost area property sales to German nationals.

In Miami, we track direct flights and tourist activity because they are great indicators of future interest in our market. This information is typically available from your airport(s), convention and visitors bureaus, or similar entities. In the Chicago area, REALTOR® associations have designated members to be real estate liaisons to foreign consulate offices.

A few years ago, we added mandatory MLS fields to include buyer country, state, and postal code of origin. We are now working to develop data reports and tools to provide to our members and the media. Such information will help us gain additional insight into international buying activity in our market.

The National Association of REALTORS® offers national, state, and local research on its website nar.realtor, that provides deep insight on international trends, top markets, and buyer characteristics.

International Conferences, Expos, and Trade Missions

Participating in international events is another great way to establish partnerships and open new markets. Although this may seem costly, there are ways to offset the expense. At the Miami Association of REALTORS®, we've developed a list of economic development agencies and other entities to share





costs. We also secure sponsors, barter, or use other creative ideas to offset the expense. For example, association members pay \$499 for shared time (about three hours) in our trade-show booth.

We attend different international events every year, depending on which markets we are targeting. In 2016, we attended MPIM in France, AREAA Summit in China, Inmociotate in Spain, NAR-India, IX Salon Inmobiliario in Colombia, Cityscape Dubai, Salon Immobilier in France, and Congress/Expo in El Salvador.

You can host your own international event or inbound trade missions as a less expensive option. In 2016, we hosted a CRS Spain trade mission, a group from Austria and other international delegations at our congress in November.

Global Education

Offering the NAR Certified International Property Specialist (CIPS) and other international education is a great way to help members realize the importance of expanding globally and to draw attention to your members and market. We will hold five CIPS classes in 2017; last year, we hosted two full CIPS institutes. We have 392 CIPS designees, including five staff executives. We also host other internationally focused member education events, including classes on immigration and visa programs, international business etiquette, and programs on referral business and how to do business in various markets.

Presenting courses on doing business

in the United States for foreign partners or at events abroad is another way to gain international presence and exposure. We've presented in many foreign markets, including Argentina, Brazil, France, Germany, India, and the UAE. Many foreign organizations are interested in how business is done in the United States so they can elevate professionalism in their markets. This is especially true in countries without licensing requirements. This type of collaboration strengthens relationships and helps promote markets in the United States and abroad.

Tools and Resources

Associations can easily create tools and resources that not only help members but also help promote the association and the market:

- **Co-branded international marketing materials (miamire.com/cobrand).** We create international marketing materials for members to personalize and co-brand with their logos and information. Materials include fliers showing our international connections and syndication of listings, top 20 reasons to buy, fliers on schools and communities, and international brochures with market information and resources for foreign buyers that the association distributes at international expos and events.
- **Foreign Investors Guide.** This guide is a compilation of articles, included in eight languages, by attorneys on immigration and visas, forms of ownership, financing, starting a business in the United States, and other information of interest to foreign buyers. We

In 2016, Latin Americans, Europeans, and Canadians—who tend to buy in warm climates for vacation purposes—mostly sought properties in Florida and Arizona. California and New York drew the most Asian buyers, while Texas mostly saw sales activity from Latin American, Caribbean, and Asian buyers.

are working to put this guide online.

- **ProxioPro.** We provide our members at no cost with this international marketing and networking platform that offers automatic translations of all listings into 19 languages, detailed profiles of offices and agents, and one-click networking for international referrals.
- **Communication and media exposure.** As with most things in business today, communication and the media can be extremely powerful. Global business development for REALTOR® associations is no different. Whether it's releasing statistical information to the news media, inviting foreign partners to your events, or highlighting awards and accomplishments, getting the word out will draw more attention to your association and generate further success.



Lynda Fernandez, CAE, RCE, CIPS, is the senior vice president of public relations and international at the Miami Association of REALTORS®. Reach her at 305-468-7040 or lynda@miamire.com.

Professional Development for You and Your Leaders

How to fulfill the Core Standards AE professional development requirements and the two new training requirements designed to promote professionalism among leaders and members.

AE professional development

There are many opportunities to fulfill the minimum six hours of annual professional development for chief staff executives required under the Core Standards. From classes on new software or conflict resolution to seminars on marketing and media relations, only you know the type of training that will help you become the best AE you can be.

Rarely do we spend time thinking about what we're not good at. The professional development requirement, however, presents the opportunity to uncover and address shortcomings. Does public speaking make you uncomfortable? Are you technologically unsavvy? Do you panic at the thought of balancing a budget?

Community colleges and trade groups such as the American Society of Association Executives are great places to find general training.

Of course, the Core Standard on AE

professional development is intended to promote education specific to managing a REALTOR® association, such as the sessions you'll find at the AE Institute (six hours of credit), the NAR Leadership Summit (three hours of credit), and the NAR New AE Orientation (six hours of credit). Yet strive to complement this type of training with more personalized opportunities unique to your location, years on the job, goals of your association, or personal interests.

Remember, your state association, not NAR, determines what will qualify as professional development, so check with it first before taking on new professional development challenges.

New: Volunteer AE professional development

Professional development for volunteers who fulfill the AE function is a new addition to the Core Standards effective with the current cycle. Some small associations with

no paid staff have volunteer leaders who fulfill basic administrative duties (the tasks that are ordinarily done by paid staff). Those volunteer leaders also must complete six hours of professional development.

New: Elected leadership professional development

Starting with the current 2017 Core Standards cycle, you must be able to document that you provided leadership development education or training for your elected leaders (at minimum the president and president-elect). If you do not directly provide the training, at a leadership retreat for example, you can promote or provide access to training, such as encouraging your leaders to take advantage of leadership training at the Leadership Summit. You're not required to fund the education but you should ensure that free options, such as the REALTOR® Leadership Program online Leadership 100 course offered

Association executives at the 2016 AE Institute in San Antonio, Texas.



Remember, your state association, not NAR, determines what will qualify as professional development, so check with it first before taking on new professional development challenges.

by NAR's Center for REALTOR® Development (2 hours of credit) are promoted to your elected leaders.

This Core Standard does not require leaders to take advantage of opportunities you make available (although the hope is many will), and associations will not lose their charters because their president didn't choose to enhance her or his leadership skills.

New: Member professional development

You must offer, promote, or provide at least one professional development opportunity for your general membership during each compliance cycle (no minimum hours required). Professional development includes training and other methods to help members develop or enhance real estate-related skills. This Core Standard doesn't require you to actually conduct or sponsor classroom training. The requirement can be met by something as simple as informing members via your website, email, or print publication about classroom and online programs, tools, and resources available from NAR, the state association, or other organizations and providers. NAR offers a wide range of professional development programs you can promote or offer to members, including Code of Ethics training, certification courses, business specialties courses, and events, such as the Broker Summit.

New: Safety education for members

You are now required to annually certify that your association has conducted or promoted a REALTOR® safety activity. You may conduct a safety activity, such as a self-defense seminar, partner with a neighboring association on a safety event, or point members to other sources of training on safety, such as the three-hour online course "Real Estate Safety Matters: Safe Business = Smart Business" at nar.realtor for \$29.95. The course materials are available free to associations to download and conduct the course at their association. You are not required to offer free safety education. Search for "association safety programs" at nar.realtor for a list of how REALTOR® associations are promoting safety.

Professional development programs and courses from NAR for staff & volunteer leadership

with suggested Core Standards credit hours



- Association Executives Institute (6 hours)
- REALTOR® Association Management (RAM) Self-Study Course (6 hours in year of completion) •
- Advanced REALTOR® Association Management (ARAM) Self-Study Course (6 hours in year of completion) •
- Professional Standards Self-Study Course (6 hours in year of completion) •
- REALTORS® Excelling in Association Leadership (REAL) Self-Study Course (3 hours in year of completion) •
- NAR Leadership Summit (3 hours)
- REALTORS® Leadership Program (RLP) Leadership 100 (2 hours) • •, 200 & 300 (3 hours)



- REALTOR® association Certified Executive (RCE) Designation (6 hours in year the designation is awarded)
- NAR New AE Orientation (6 hours) •
- e-PRO Day 1 (6 hours) (Note: An AE-specific course is offered at AEI but staff can also take the regular version.)
- e-PRO Day 2 (6 hours)
- RPR: Real Time Data, Market Knowledge, Informed Customers (3 hours)
- At Home With Diversity (6 hours) •

- NAR Attorney Seminar • (morning session at the annual convention) (3 hours)
- NAR's Professional Standards Administrator Training at AE Institute (6 hours)
- NAR Professional Standards Education Seminar (6 hours)
- NAR Mediation/Mediator Training Seminar (6 hours)
- REALTOR® Party Immersion Day Training (at AEI) (6 hours) •
- REALTOR® Party Hub Training (4 hours) • •
- Commercial Membership By Design (3 hours)
- Discovering Commercial Real Estate (3 hours)
- CIPS Global Programs for Associations

(Note: All state REALTOR® associations are required to offer 6 hours of professional development opportunities to their local AEs.)



REALTOR® University Graduate Certificate Program in Real Estate Association Management Courses

- Real Estate Association Management I – Leadership and Governance (6 hours)
- Real Estate Association Management II – Association Financial Management (6 hours)
- Program Development and Accountability in Real Estate Associations (6 hours)
- Issues and Trends in Real Estate (6 hours)
- Real Estate Law (6 hours)
- Real Estate Finance and Investments (6 hours)

• = Free
• = Online

Shifting Focus From Politics to Policy

Michael Theo on the critical job of helping AEs to stir up the grassroots.

It's an opportune time for Michael Theo, RCE, CAE, CEO of the Wisconsin REALTORS® Association, to be chair of the AE Committee. Not only does he have more than 30 years of REALTOR® organization experience but his advocacy talents (honed by 25 years as association chief lobbyist) also will be needed to lead AEs at this critical juncture in American politics.

"This is an exceptionally important time for AEs and their staffs to engage members, given the threats and opportunities that exist for tax and regulatory changes," says Theo. "The work AEs put into getting members engaged in advocacy—keeping them engaged and informed, mobilizing them when necessary, and building personal relationships with lawmakers—has all been for moments like this."

The REALTOR® organization has for a long time talked about the fragility of the mortgage interest deduction and the reform of Freddie Mac and Fannie Mae, but Theo says, "I really believe those are going to come to fruition now."

So what can state—and especially local—associations do to ensure that advocacy is front and center, especially given the deep political divides among members?

Theo says the key is to stick to the issues. "The intensity of the partisan divide puts additional pressure on association staff to emphasize the issues themselves and the impact on home owners and our members, as opposed to the political party that may support or oppose them.

"Successful REALTOR® associations make their case for an issue regardless of who's in power. We're lucky in that our issues, if positioned correctly, enable us to avoid today's hyperpartisanship."



Theo has a long track record of getting good bills passed in Wisconsin and killing bad ones. Regardless of which party controls the legislature, Wisconsin has had a steady success rate, but 2016 was its most successful year, says Theo. Wisconsin REALTORS® championed 49 policies that were passed in a dozen different bills last year.

As with many associations, Wisconsin's level of member engagement in RPAC in 2016 reached a record high. "We had a lot of participation, the market was good, politics and campaigns were high-profile every day, and RPAC contributions went through the roof," says Theo.

But can associations sustain high participation rates in 2017, especially when many members are feeling victorious while others are in despair?

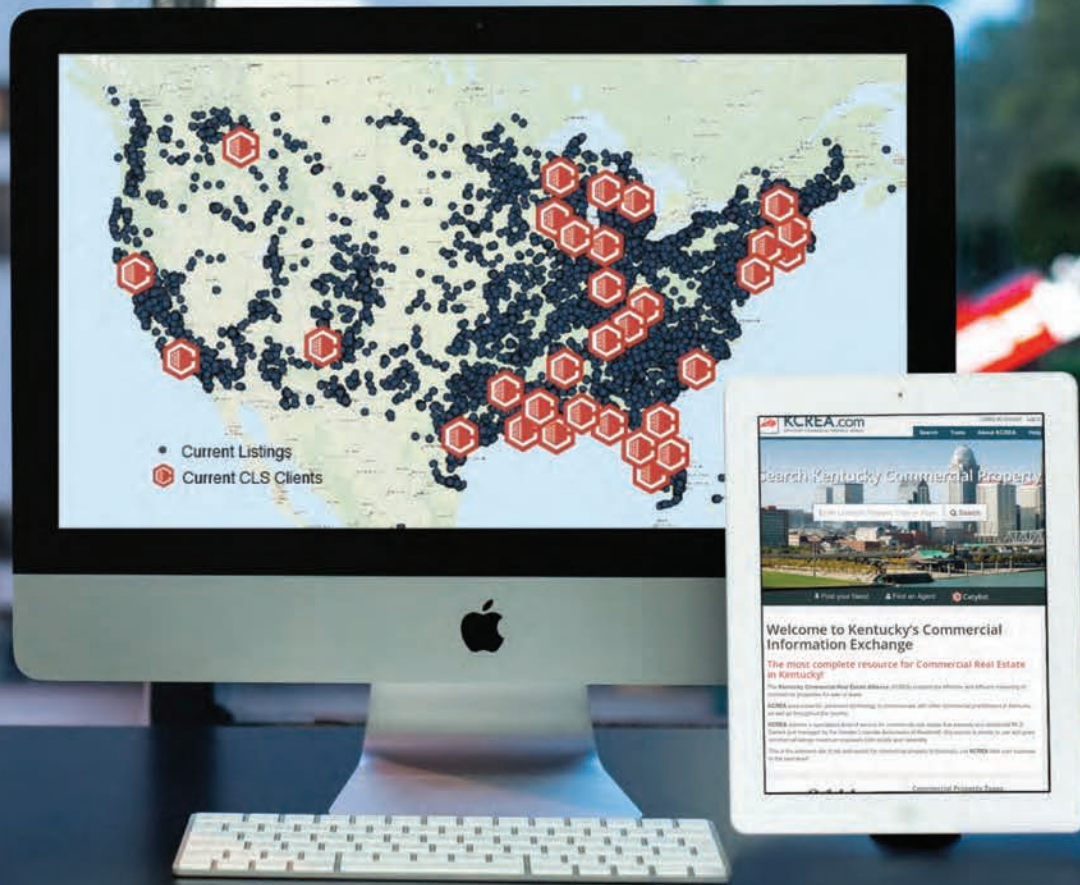
Although it is typical for member participation to drop slightly in the year after an election, the need for member action doesn't drop; it only shifts from politics to policy, says Theo. "All the political involvement, membership mobilization, and lobbying aren't

about winning or losing elections; they're about winning or losing when the vote is taken on our issues. We need to tell members that regardless of how you voted, we have a new Congress, a new president, and newly elected state legislators, so now our focus is on where the rubber really meets the road, which is lawmaking and rule making."

In Wisconsin, Theo's lobbying team is gearing up now for the next big battle in the state legislature over taxing and spending that will test his association's ability to appear bipartisan.

After years of successfully lobbying to cap property taxes, the Wisconsin REALTORS® Association finds itself in the position of advocating for better schools and roads, which could involve advocating for tax shifts, from property taxes to other sources of revenues. "These are difficult choices that will test our legislative relations," Theo says. Yet, the WRA's chances of success on this and other key issues are high given its strong relationship with lawmakers. The WRA has a long relationship with House Speaker Paul Ryan from Wisconsin, which may help with key national issues as well. Likewise with Congressman Sean Duffy, who is the new chairman of the subcommittee charged with Fannie and Freddie reform, and the new White House Chief of Staff Reince Priebus, who Theo and the WRA have known for decades.

"It's a good time to have an organization that overtly says we're an advocacy organization first and foremost," says Theo. "The time has come for us to take this advocacy out for a drive and see what we've built and hope that everything hits on all cylinders because we have to be engaged like never before."



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