WINTER 2025

AEXPERIENCE

FOR ASSOCIATION EXECUTIVES.
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Strategizing how and when to communicate with your members

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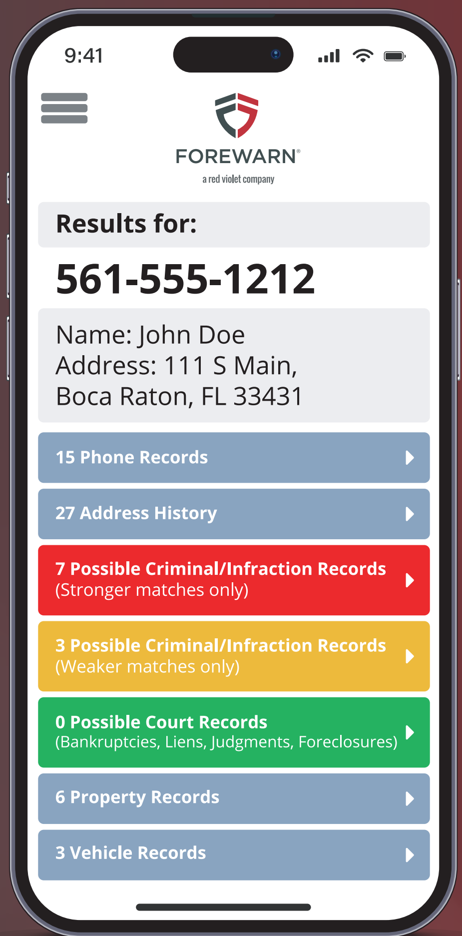

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— **John Gormley**, CEO
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WINTER 2025

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ON THE WEB

Get Ready for AE Institute, April 1–4, 2025
Get your Rocky Mountain high in Denver this spring at AE Institute 2025. Registration is open now. Check out our schedule overviews and start mapping out the sessions you don't want to miss. See you in Denver!

nar.realtor/events/ae-institute

AEXPERIENCE

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

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NATIONAL ASSOCIATION OF REALTORS® OFFICIAL PUBLICATION

AEC CHAIR

Tell Me a Story

As I prepare for 2025, I've been reflecting on the pivotal role we play in guiding our members through a constantly changing industry. More than ever, our task goes beyond managing operations or implementing strategic initiatives. Our value and strength as association leaders shine when we are also the chief storyteller for our members, our communities and especially each other.

Telling stories is one of the most powerful communication tools we have to foster connection, especially among our fellow association executives and CEOs. The challenges we face—whether navigating industry changes, supporting our members or advocating for transparency in real estate—are significant. Storytelling is also relatable: By sharing insights, lessons learned and strategies for overcoming obstacles, we can turn our own experiences into resources for others.

Success stories of members adapting to industry shifts can inspire others, and sharing tough lessons learned shows resilience in action. Stories about how and why we've created member services show our impact, while advocacy wins remind us of the power of working together. Collaborative efforts across associations highlight the strength of unity, and members' own voices keep us grounded in our mission.

By telling stories, we build a supportive network that fuels ideas and moves our associations and members forward together.

Tricia Thomas, RCE, CEO, Bay East Association of REALTORS®

Connecting through storytelling also strengthens our professional bonds. Just as the members of our associations come from diverse backgrounds and bring unique perspectives, so do we as leaders. By sharing our personal and professional journeys, we cultivate a deeper sense of community and trust. Your stories about navigating new challenges or developing innovative member services might spark an idea for another executive facing a similar issue. Through our stories, we enrich the entire association network and become a lifeline for one another.

But let's not just tell stories—let's create a culture of sharing where each story becomes a building block for progress. Reflect on your own experiences, and share a story in this magazine (email danielle.moores@theygsgroup.com) or in our AEI Year-Round Facebook group that could make a difference to someone else. Whether it's a small win, a lesson from a challenge or a vision for the future, your narrative matters. By opening up and connecting, we strengthen our collective impact, inspiring each other and our members to grow and thrive.

So, let's connect. I can't wait to hear the stories you have to tell.

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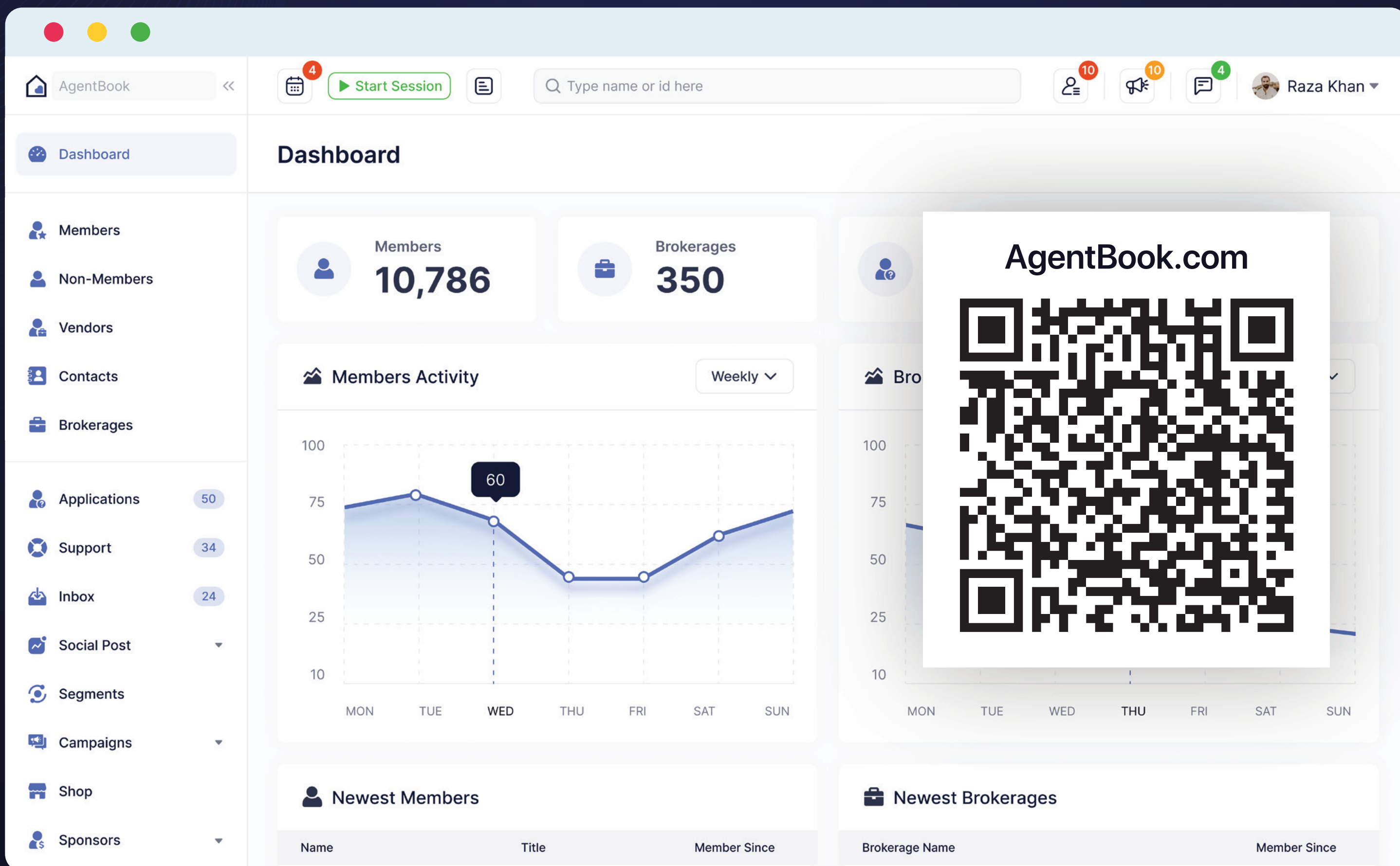

Supercharge your association by eliminating friction for your team Allowing them to build meaningful relationships with members.

- Member Management
- Email/SMS Campaigns
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- Education Forum
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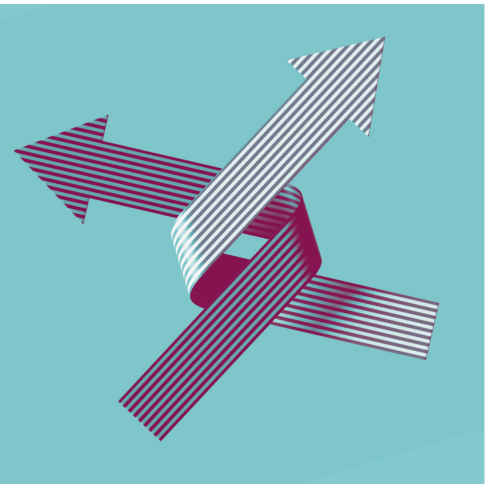
AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS



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COMMUNICATION

It's a Two-Way Street

You're focused on positive member communications, sending out the right emails, social media messages and phone calls. Make sure you're just as focused on how you respond to members when they reach out to you.

Effective communication means both parties need to understand each other. *Forbes* offers these strategies to make sure when members reach out, you're connecting right back.

- **Practice active listening** with eye contact and relevant gestures. Don't just listen so you can reply.
- **Be courteous,** even during disagreements, avoiding offensive words. This includes watching your body language and facial expressions, and using the right tone, so you don't give off unintentional cues.
- **Stay open-minded.** Consider others and be respectful. For example, discuss concerns rather than make assumptions.
- **Ask for feedback.** It's a bold move, but ask team members for thoughtful feedback on your communication style.

Adapted from "10 Tips on Effective Communication in the Workplace" by Christiana Jolaoso, Forbes, *June 17, 2024.*

TRACKING INQUIRIES

How One Association Reduced Its Response Times

We've all gotten used to instant gratification. So, as we strive to provide the highest level of service to our members, fast and effective communication is vital.

Using tools and systems that enhance our response times is one way to do that. That's why Bonita Springs-Estero REALTORS® in Florida has implemented a ticketing system with a chatbot, along with a dedicated support email address, to help our team of five serve 1,500 members.

Ticket to Success

Our ticketing system is designed to track and manage member inquiries, ensuring that no question goes unanswered and no concern falls through the cracks. Each ticket can be assigned to specific staff members or departments, making it easy to distribute the workload, track progress and hold team members accountable for a quick response.

Over time, the ticketing system generates valuable data about response times, staff performance, user satisfaction and common questions. This information can guide training and development efforts, helping us to continually improve our messaging to members and build our website and member portal.

Our system also features a chatbot, which can support staff by providing answers from information already available on our website. The chatbot, powered by artificial intelligence, reviews our website as a data source and creates questions and answers from that data. For instance, if someone asks our bot how to join the association, it automatically replies with the link to the information on our website, with no need for human interaction.

As you get started, the first product you try may not be the best fit for you. We began with Microsoft Teams and app add-ons, but that solution wasn't quite right for us. We now use tawk.to, which has both the chat and ticketing system. It easily embeds into your website as a widget, and it is free, with the option of paid add-on services.

One Email to Answer Them All

While the ticketing system serves as a powerful communications management tool, a dedicated support email address adds another layer of organization and accessibility. It provides members with a straightforward way to reach out for assistance, reduces confusion about which staff member to contact and ensures that inquiries are directed to the appropriate channels. So, in addition to individual work emails, all staff receive emails from support@berealtors.org. When team members respond, they "reply all" so the rest of the team knows that the member's question has been addressed.

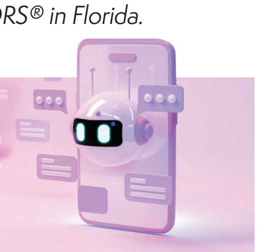
A shared support email allows staff to collaborate on responses, fostering a team environment where knowledge is shared and best practices are implemented. It's also an indirect way to cross-train team members. And, when a staff member is out of the office, no emails are left unattended! Our members appreciate timely communication and the avoidance of an out-of-the-office response.

Make the Strategic Move

Implementing a ticketing system and a dedicated support email address is not just a logistical improvement; it's a strategic move that positions our REALTOR® association for greater success. By streamlining and enhancing our communication channels, we can provide our members with the responsive and organized service they deserve, leading to higher satisfaction and retention rates.

—Meighan Harris, RCE, IOM, *is CEO at Bonita Springs-Estero REALTORS® in Florida.*

Response time in our chat system by a staff member averages less than a minute, with chats typically lasting one to five minutes.



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BEST PRACTICES

Tips from a Seasoned Pro

Success in leadership, especially as a chief staff executive, hinges on creating an environment where transparency, trust and support empower teams to perform their best, says Travis Kessler, RCE, CAE, who is retiring this year after 15 years as president and CEO of Texas REALTORS® and nearly 48 years in association leadership. Here are five essential lessons he has learned along the way:

1 Embrace flexibility and adaptability. In a constantly evolving industry, facing market disruptions and changing member expectations, adaptability is key. Being agile and open to change allows you to stay focused on what truly matters, ensuring your organization remains resilient and proactive.

2 Stay anchored with a strategic plan. A clear strategic plan is your road map. It shapes the budget, aligns resources and drives your association's priorities. The ability to align the organization's budget with long-term goals ensures that your team is equipped to implement meaningful change and deliver on the association's mission.

3 Prioritize relationships. Strong relationships with brokers, members, employees and leaders are the foundation of long-term success. Trust and open communication build resilience during challenging times and open doors for innovation and growth. Never underestimate the power of relationships in navigating the complexities of leadership.

4 Foster a culture of sustainability. Cultivating a culture that prioritizes member engagement, relevance and value will strengthen your association's sustainability. Such a culture not only reinforces performance but also protects your organization's reputation in the eyes of both members and stakeholders.

5 Build a lasting legacy. Legacy isn't just about short-term wins—it's about visionary thinking that creates lasting value. By focusing on long-term projects and data-driven decision-making, you'll leave a positive impact that extends beyond your tenure. Leading with ethics, empathy and logical reasoning should always guide your decision-making to ensure your legacy is one of integrity and sustainable growth.

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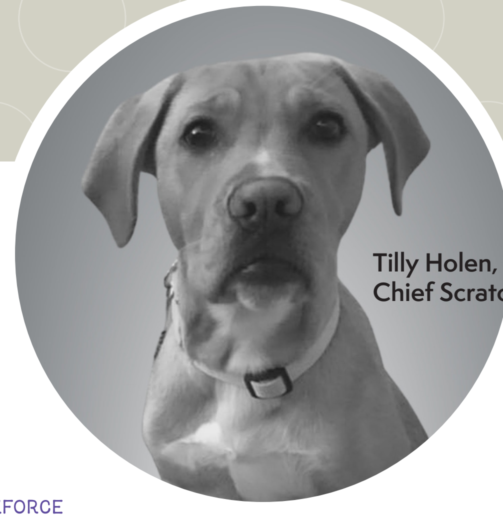


Tilly Holen, Chief Scratchetist

WORKFORCE

This Staff Member Is the Top Dog

"Her positive attitude is infectious, she gets along with everyone, offers comfort when needed, and reminds us all not to take things too seriously."

Sounds like a staff member you'd like to have, right? Meet Tilly Holen.

Tilly, a Lab mix, was rescued as a puppy by Portland Metropolitan Association of REALTORS® CEO Michele Holen, RCE, CAE. Tilly has been on staff since Holen took on the CEO role in 2021. "She's become such a big part of staff culture," Holen says.

The Portland office has always been dog-friendly and, with Tilly on board, is even more so. Tilly even has her own entry and photo on the staff page of the website—her job title is Canine Relations Manager, and her skills include Puplick Relations, Furnancial Advisor, Barketing Manager, Junior Pawject Manager and Chief Scratchetist.

"I love having Tilly as my co-worker because she is great at reminding me to take a break," Director of Operations Bee Tyree says. "Too often I become glued to a project, and then I hear Tilly ring her doorbell, and I am reminded that we all need breaks. Taking Tilly for a quick walk is the perfect way to get moving and decompress so I can be productive for the rest of the day. Seeing her cut loose and do a zoomie around the office for no reason always brings a smile to my face."

"When someone new shows up at the door, she might give a few barks to keep us in the loop—or to show them who's boss," adds Diana Colin, professional standards administrator. "Having Tilly around means extra laughs, extra love and an awesome alarm system. Plus, our members always smile when they see Tilly's picture listed as 'staff' on our office roster."

©GETTY IMAGES/ISRAEL SEBASTIAN/MOMENT

As a staff member, Tilly isn't immune from spam emails. "But," Holen says, "she knows better than to click on any suspicious links or respond to these kinds of requests."

AOR IN ACTION
NEWS AND IDEAS FROM YOUR PEERS

FAREWELL

Volkodav Brought Out the Best in Others

In November, REALTOR® association executives mourned the passing of Steve Volkodav, RCE, CEO of Pikes Peak Association of REALTORS®, Colorado. Volkodav died Nov. 11 after a long battle with cancer. He was 59.

Before joining the Pikes Peak association in 2020, Volkodav was CEO of the North Shore-Barrington Association of REALTORS®, Illinois. He joined NSBAR in 2000 as director of information systems before being named chief information officer. In 2013, he was named CEO.

Volkodav was inducted into the Dr. Almon R. (Bud) Smith, RCE, AE Leadership Society in 2018. Colleagues remember him as an exemplar, mentor and friend.

"Steve made every single person feel like the most important person in the room. He was smart and creative, always driving the rest of us to be our very best," Deb Haines-Kulick, RCE, executive officer at Clarksville Association of REALTORS®, Tenn., said in a tribute on Volkodav's Facebook page. "I am so grateful for the years I got to know him."

Kevan Lyons, RCE, CEO of the REALTORS® of Central Colorado, added, "If Steve knew [you] for five minutes, he was your friend."

Volkodav is survived by his wife, Jennifer, and four children, Stratton, Morgan, Mac and Skylar.

HATS OFF

Congratulations, C2EX Winners!

Eight associations were recognized in November as winners of the 2024 C2EX Ambassador Challenge.

By recruiting new C2EX ambassadors, these associations are helping ensure that more National Association of REALTORS® members can proudly take a stand for professionalism:

- North Dakota Association of REALTORS®
- Kansas Association of REALTORS®
- NC REALTORS®
- Nevada REALTORS®
- Elko County REALTORS®, Nev.
- Northwest Louisiana Association of REALTORS®
- Space Coast Association of REALTORS®, Fla.
- Greater Boston Real Estate Board

Thanks to every association that took part and helped expand the C2EX Ambassador program.

nar.realtor/realtors-commitment-to-excellence/c2ex-challenge

NEW PRACTICES

Reinforcing Value

One of the most effective ways of communicating the practice changes to consumers has been through a grassroots initiative that empowers agents who are REALTORS®. Members who volunteer as surrogates receive content to share in social media and collaborate with NAR and their state and local associations when serving as a spokesperson for news media.

An Aug. 14 media tour alone netted 40 interviews, 460 media spots and an audience of more than 17 million. NAR tracking shows that a majority of the stories resulting from the surrogate program are positive or neutral.

Surrogates receive a regular newsletter with updates and information. To join the surrogate program or suggest members, email surrogates@nar.realtor.

1,000+
Surrogates

3,400
Mentions in news articles

8,000+
Social shares

9.3 billion
Potential audience reach

All data is as of January 2025.

DUES CLUES

Out of Office

If you're a small association, here's one easy way to use member dues efficiently: Work out of a home office.

A recent question on AEI Year-Round garnered responses from 12 associations with fewer than 500 members whose AE is fully remote. Here are a few best practices if you're thinking of joining the work-from-home bandwagon:

- Meet with new agents at their office. Bonus: The broker gets to be involved!
- Hold board meetings at different real estate offices.

- Membership meetings can take place at local conference venues or restaurants.
- Consider renting a small space just for storage or to receive mail.
- Talk to your board about covering equipment, supplies, internet service, a landline and a portion of cellphone costs.

LAND OF THE SKY ASSOCIATION OF REALTORS®

DISASTER RESPONSE

Coming Back from Hurricane Destruction

For the towns of Augusta, Ga., and Asheville, N.C., Hurricane Helene was expected to cause some wind and thunderstorms.

But in late September, Augusta woke up to nearly 100 mile-per-hour winds that uprooted pines and oaks—up to 90% of the canopy in some areas. The trees pounded down on homes, cars and utility lines, trapping residents on their streets for days in many cases. And in the Asheville region, unprecedented rainfall rerouted rivers and roads, stranding families and washing away businesses, homes and even entire neighborhoods, including downtown Chimney Rock. It also caused prolonged power outages, contaminated water sources and has led to $53 billion in damages in North Carolina alone.

For Stacie Adkins, RCE, CEO of REALTORS® of Greater Augusta, and Bryan Wooding, director of membership and communications and professional standards administrator for Land of the Sky Association of REALTORS® in Asheville, the days and weeks that followed quickly turned from business as usual to disaster response.

Here are some of the actions taken and lessons learned:

- Helene took down power lines and internet service in Asheville. Cell service was the first to return, so LOTSAR turned to social media, email and web communications, as well as phone calls, to check on members and communicate resources.
- With the association office located in an area with underground utilities and its internet provider just next door, RGA was lucky—it regained power and internet in the first week after the storm. It quickly established a disaster relief application, mirrored after the state association's application, to identify specific member needs, and it opened its office so members could power devices and use the internet. RGA also mobilized available staff, officers, directors and volunteers to make personal phone calls to check on members.
- Under the leadership of President Nick Hinton and Past President Katie Wangrin, LOTSAR opened a supply depot, distributing bottled water, formula, nonperishable food, first aid items, batteries, hot meals, wheelbarrows and other tools, and other resources donated by the members locally and from across the state.

"Helene's effects were tragic and will be long-lasting, but we are overwhelmingly proud of the REALTOR® community."

—Stacie Adkins, REALTORS® of Greater Augusta

LOTSAR staff also assisted families applying for REALTORS® Relief Foundation funds.

- RGA became a relief center, stocked with groceries and essential items for members, while volunteer teams were sent to affected areas to distribute supplies and provide aid. RGA also worked closely with local nonprofit organizations to support the broader community, donating supplies, volunteering time and providing financial assistance.
- For members, LOTSAR shared information on financial recovery for small businesses and how to apply for FEMA funds. It held educational sessions on how to handle pending contracts affected by Helene and other post-disaster real estate issues. When power returned to the office, the association opened its event space for members who needed internet service and a place to work.
- Both state associations waived dues for members of the local boards.
- RGA says it learned the importance of having a robust disaster preparedness plan in place. While it was able to adapt to the challenges after the storm, a pre-arranged plan would have allowed it to respond more efficiently. Working together with local EMA offices and the state's public service commission, the association is developing a comprehensive plan outlining response procedures.

Editor's Note: At press time, AExperience was monitoring the devastating wildfires in LA County and will share stories of state and local association support in the Spring 2025 issue. To donate, visit rrf.realtor.

LAND OF THE SKY ASSOCIATION OF REALTORS®

Matt Allen, LOTSAR director of professional development and government affairs, and LOTSAR member Stephanie Walker

AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS

THE HUB

I'd like to use The Hub as more of a resource, but I'm not sure I'm maximizing its potential. Help!

That's a common request, says Shawn Sanford, MBA, CAE, director of community engagement for the National Association of REALTORS®. The Hub (thehub.realtor) is a year-round connection tool where NAR members and association staff in national governance and leadership positions can network and collaborate in a private, secure location via a computer or mobile device (yes, there's an app!). Here's a quick FAQ to help you and your leaders make the most of The Hub.

What groups are there for AEs and others in leadership positions?

All AEs and certain staff in specific functional roles are assigned to Hub communities based on their role. For example, AEs can be assigned to communities for state, local or new AEs as well as other communities depending on their roles on committees or work groups.

There are also communities for AE mentors/mentees; association diversity, equity and inclusion staff liaisons; and government affairs directors, to name a few.

All users of The Hub agree to the terms of use (thehub.realtor/termsofuse).

SKILLED LIAISON

NJ REALTORS® CEO Joins NAR to Lead Industry Relations

The National Association of REALTORS® has appointed Jarrod Grasso, RCE, CEO of NJ REALTORS®, as its senior vice president of industry relations.

Starting in March, Grasso will lead NAR's efforts to enhance engagement with state and local associations.

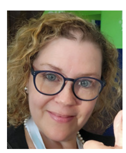
"Investing in dedicated resources to facilitate state and local relations is critical to ensure we're hearing real-time feedback about challenges leaders face so they can be addressed quickly," says NAR CEO Nykia Wright. "Jarrod's extraordinary reputation across the industry and with our national, state and local associations makes him the perfect fit for this position."

Grasso spent more than two decades at NJ REALTORS®; before becoming CEO, he served as chief lobbyist and vice president of government affairs for the organization.

"I look forward to working alongside my association colleagues, our members and other industry partners to demonstrate how, together, we can create meaningful solutions for REALTORS®," Grasso says. "By fostering strong relationships and addressing critical industry priorities, we can help members remain indispensable."

Among his many achievements, Grasso was inducted into the Association Executives Committee's Dr. Almon R. "Bud" Smith Leadership Society in 2013; he also won the William R. Magel Award of Excellence in 2020 and the REALTOR® Association Certified Executive designation in 2006.

Congratulations to New RCEs



Shannon Allen, RCE
Florida REALTORS®

Cristin Beverley, RCE
REALTORS® of Punta Gorda-Port Charlotte-North Port-DeSoto, Florida

Jennifer Armandi, RCE
Cape Cod and Islands Association of REALTORS®, Massachusetts

Valerie Biletsky, RCE
Southland Regional Association of REALTORS®, California

Liz Barndt, RCE
Orange County REALTORS®, California

Emily Bowden, RCE
Sussex County Association of REALTORS®, New Jersey

Sandra Barnhardt, RCE
Mid Carolina Regional Association of REALTORS®, North Carolina

Jeremy Brewer, RCE, CAE
San Antonio Board of REALTORS®, Texas

Timothy Beaubien, RCE
Arizona Association of REALTORS®

Cara Budde, RCE
Ohio REALTORS®

I haven't been active on The Hub before—how can I get started?

- Complete your profile! Add your photo, credentials and other key information about who you are.
- Review recent discussions on relevant topics.
- Meet with staff dedicated to supporting AEs. Andrew Scoulas, manager of association information and resources, and Cindy Sampalis, director of engagement and association leadership development, are here to support you on this journey. Don't hesitate to reach out to them.
- Ask a question! Leverage the brain trust of your AE peers to gain their insights, find a mentor and meet a new friend.

What value does The Hub provide AEs?

Because all AEs are added to their respective AE communities, they can leverage the hive mind of peers on topics such as:

- Dues billing tips and tricks
- Fresh approaches to strategic planning
- Member engagement strategies
- Board of directors relations
- Association operations and staffing

The communities are full of robust discussions related to association or industry business, particularly at the committee level, and any member of a community may initiate conversation. The Hub also serves as an important resource that NAR uses to communicate critical news to association leaders.

thehub.realtor


Michael Carlin, RCE
Tri-County Suburban REALTORS®, Pennsylvania


Ana Casanova, RCE
Greater Lewisville Association of REALTORS®, Texas


Kathy Cook, RCE
Mountain Resort Communities Association of REALTORS®, California


Katie Fletcher, RCE
Sierra Nevada REALTORS®, Nevada

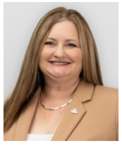

Cara Harmon, RCE
Missouri REALTORS®


James Holden, RCE
East Tennessee REALTORS®


Elijah Jennings, RCE
REALTORS® Association of Lake and Sumter Counties, Florida


Heather McGowan, RCE
National Association of REALTORS®, Illinois

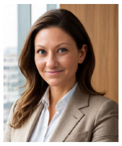

Lillie McLean, RCE
Georgia Association of REALTORS®


Jennifer Moore, RCE
Abilene Association of REALTORS®, Texas


Douglas Phillips, RCE
Greater Erie Board of REALTORS®, Pennsylvania


Tim Shaw, RCE
Tri-Counties Association of REALTORS®, California


Joseph Sutliff, RCE
New River Valley Association of REALTORS®, Virginia


Laura Tilley, RCE
Heartland Association of REALTORS®, Texas


Michele Xiong, RCE
Raleigh Regional Association of REALTORS®, North Carolina

Take Your RCE

RCE exams are offered locally online in April and October with an RCE proctor. You must be preregistered and have a computer and secure internet connection. There are three modules; set aside an hour for each.

nar.realtor/designations-and-certifications/rce


Q1
Q2

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Map Out Your Message

You want to engage and delight your members. To do that, try using integrated marketing and communications in your annual strategic planning.

BY JOHN GORMLEY, RCE, CAE

Mainstreet REALTORS® is a 19,000-member association in the vast Chicago suburbs. With so many members to reach and engage on a wide variety of topics and goals, effective communications can be challenging. If you run a small or even medium-sized association, you might view your challenges differently. But every REALTOR® association can benefit from a holistic approach to communications planning.

When I was in graduate school, we studied IMC, or integrated marketing communications. At the heart of IMC is the belief that communications and marketing aren't all that different; they're two sides of the same coin. For our associations, this is especially relevant. We don't have time to figure out where communications end and marketing begins. Besides, I would contend that—in my honest opinion—all associations are essentially marketing organizations.

Whether we realize it or not, we're constantly trying to persuade current and prospective members of this simple truth: The more they put into their association in terms of their own participation, involvement and engagement, the more they'll get out of it. The value of our value proposition depends in part on them. But we have to reach them and gain their attention first.

That means going to where they are (using the right channels) and speaking in a language that's relevant (using the right words) to connect.

With these goals in mind, let's look at the basic steps of building a comprehensive communications and marketing plan for your association. (I'll throw in some examples from Mainstreet at no extra charge.)

How Are You Listening to Members?

To keep a pulse on what members are thinking and feeling, at Mainstreet we use a two-way communication program called Listen360. Here's how it works.

After a member interacts with our website, talks with staff via web chat or calls into the association, the member is served up a two-question Listen360 survey via email. Based on the member's response, staff may follow up with a personal email or phone call.

The system will trigger an email or call if a member previously rated us between an 8 and a 10 and then rated us lower the next time. The biggest point in Listen360 is that we are listening to our members, and they always seem surprised and appreciative when someone from the association actually reaches out. More often than not, when rating Mainstreet less than an 8, the member just needs clarification and a personal touch.

We share positive member comments about Mainstreet with our staff and board. With negative member comments, we work to try to solve the issue and may even use suggestions to build future programs and services.

Listen360 also gives us our NPS, our net promoter score. It's a constantly changing measure of member satisfaction, which we track monthly through our Mainstreet Dashboard infographic.

Step 1: Define Your Goals and Objectives

Using your strategic plan as your top-level guide, ask yourself: What do you want to achieve through your communications and marketing efforts? For example, are you looking to increase membership, promote events or raise awareness about an issue? The answer is probably all three plus a few more. By clearly defining the goals you want to achieve, you can tailor your communication strategies to meet these objectives effectively.

At Mainstreet, we're typically marketing four distinct categories:

1. **Events:** Networking, usually with a learning component
2. **Education:** Classes and designation courses
3. **Benefits:** Those included with membership, such as forms, technology and safety apps, and optional discounts on tools like customer relationship management and transaction management platforms
4. **Issues:** Local, state and national issues members should know about

Some of our communications are combinations. For example, we now offer a popular CRM at a deep, members-only discount, along with free training on business planning and goal setting, including how to set up and use the CRM. Any member can take the training without buying the CRM. Our primary target for this program is newer members who have done at least one transaction—which brings up our next step.

Step 2: Identify Your Target Audience

Are you targeting new agents, brokers, top producers? Identifying those audiences and understanding their needs, preferences and communication channels will help you create targeted messages that resonate with them.

At Mainstreet, we've broken our membership down into six groups, based on where members are in their real estate careers, and designed programming specifically for each. The cohorts are:

- Exploration
- Mid-career
- Career change
- Late career
- Established
- Withdraw

We create communication mini-plans (pathways) with specialized education and offerings to help members succeed and thrive as they progress through their careers. Most members probably don't realize it, but they're all part of a target audience, fitting within one of these cohorts.

Step 3: Conduct a Communications Audit

Before developing your full plan, it's helpful to conduct a communications audit to assess your current efforts. Evaluate your organization's existing communication channels, messaging and branding to identify areas for improvement. This audit will help you identify gaps in your communications strategy and develop a plan to address them effectively.

A couple of years ago, we hired an expert to develop and conduct a comprehensive communications audit for Mainstreet. It involved more than 70 hours of Zoom interviews with members and staff. The audit confirmed we were on the right track in many areas but off-target in others—especially coming out of the COVID-19 pandemic, since members' expectations for education and networking had shifted dramatically. Most members wanted a Zoom option for education but still favored live events for networking.

Step 4: Develop a Content Calendar

A content calendar is a crucial tool for planning and organizing your communication efforts throughout the year. Create a calendar that outlines key events, campaigns and initiatives that you want to promote. Include important dates, deadlines and milestones to ensure that your communication efforts are timely and relevant. (*See "One More Piece of Advice," page 18.*)

At Mainstreet, our allied partners—the multicultural real estate groups like the National Association of Hispanic Real Estate Professionals, Asian Real Estate Association of America, National Association of Real Estate Brokers, LGBTQ+ Real Estate Alliance and Women's Council of REALTORS®—are very important to us. We strive to support their events and include them in ours. This takes extra planning, but it's well worth it.

Of course, things will come up during the year that you hadn't planned for, especially in these rapidly evolving times. But at least you'll have two-thirds to three-quarters of your year mapped out ahead of time.

MAINSTREET REALTORS®

Below: Mainstreet shares news from its allied partners, including the LGBTQ+ Real Estate Alliance. From left: Events for young professionals and advocacy opportunities like the annual Capitol Conference are among the many offerings for Mainstreet members based on career stage and interest.

Step 5: Choose the Right Communication Channels

Selecting the right communication channels is essential for reaching your target audience effectively. Consider using a mix of traditional and digital channels—such as email newsletters, social media, websites and print materials. At Mainstreet, we also employ texting and automated voice calls to members. Tailor your messaging and content to fit each channel's unique requirements and engage with your audience effectively.

This is perhaps the most difficult challenge because one size does not fit all. Different members have different needs and wants for how they wish to be reached. Your communication audit and ongoing listening efforts (*see "How Are You Listening to Members?" on page 14*) can help. One thing's for sure, though: Email is now considered white noise. Readers tend to tune it out. So, if you're relying almost solely on email to reach your members, you'll want to diversify.

Step 6: Create Compelling Content

Compelling content is essential for capturing your audience's attention and driving engagement. Develop high-quality, relevant content that educates, informs and entertains your target audience. Use a mix of text, images, videos and infographics to create engaging content that resonates.

No matter the size of your association, you can leverage low-cost tools such as Canva, Constant Contact and SurveyMonkey for both content creation and feedback (*for more, see "The Right Tools, Right Now" in the Fall 2024 issue, nar.realtor/ae/aexperience/the-right-tools-right-now*).

Anything you can do to leverage existing content and repurpose it to extend its reach across multiple channels saves time and money.

One thing we do at Mainstreet is scheduling time in the video studio when the president is at headquarters. We'll often shoot parts of two or three videos to take advantage of her schedule, then edit them later as deadlines dictate. Having your comprehensive plan and calendar helps, assuming you have several events to promote as the year unfolds.

Step 7: Monitor and Measure Your Results

Monitoring and measuring your communication efforts are crucial for evaluating your plan's effectiveness and making necessary adjustments. Use key performance indicators such as website traffic, social media engagement, email open rates and event attendance to track your progress and identify areas for improvement.

We have a multipage infographic—called Mainstreet Dashboard—updated for every board meeting with our latest KPIs, including all of the above. We also will resend targeted emails depending on open rates. If the initial open rate was low, we'll resend at a different time and with a different subject line. Often, this boosts engagement and, in the case of events or education promotions, helps us reach our registration goals.

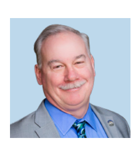
Step 8: Evaluate and Adjust Your Plan

At the end of the year, evaluate your communications plan performance against your goals and objectives. Identify what worked well and what could be improved, and use this feedback to adjust your plan for the following year. Continuously refine your communications strategy to ensure that it remains relevant and effective.

Sometimes, perhaps often, things come up that cause you to change your plans. That's OK. Whatever it is, you can plug-and-play. For example, for much of 2024, we shifted our overall focus to the National Association of REALTORS® settlement and what members could and should do to adjust to the new practices (*see "The Big ReThink" in the Summer 2024 issue, nar.realtor/ae/aexperience/the-big-rethink*). But we still used the same techniques for effective communications planning.

Final Thoughts

Creating an annual communications plan requires careful preparation, strategic thinking and ongoing evaluation. By following these principles, you can engage with your target audiences, promote your organization effectively, and drive success for you and your members. Remember to stay flexible, adapt to changing trends and continuously refine your communications strategy to stay ahead of the curve. ●



John Gormley, RCE, CAE, is CEO of Mainstreet Organization of REALTORS® in Downers Grove, Ill.

CUTTING THROUGH THE NO

IF YOUR TYPICAL COMMUNICATIONS TARGET YOUR ENTIRE MEMBERSHIP, YOU'RE MISSING OUT ON THE POWER OF AUDIENCE SEGMENTATION.

BY ALLISON WOODHAM, RCE

Whether via emails, text messages or other forums, so many senders are competing to get to our members today, from vendors pitching on how to increase leads and listings to software companies selling a new product. So, as associations, we must make communication with our members count. It's so easy to talk about this idea, but how is it actually done?

Here's the bottom line on how to create meaningful member communications—beyond "what's in it for me?" Not all members need all messaging.

Although I'm the education director for Baldwin REALTORS® in Alabama, I started in communications during a pivotal moment in our association and MLS: After decades on the previous platform, we were converting our MLS along with a suite of other MLS tools, and the training we provided was—wait for it—*mandatory*. I learned a thing or two about communicating intentionally during that whirlwind of a few months. I now work with our awesome and knowledgeable communication director on audience segmentation. Instead of blasting all messages out to our full membership, we segment emails to our members to ensure we're communicating with value.

What Is Audience Segmentation?

For those who don't know where to start—or even understand what segmentation is—here are a few definitions. Audience segmentation means dividing up your audience into different groups according to specific criteria, such as membership type, designations or certifications held, transaction volume, or a specific area in which members sell. Using a few tools—available through your association management system, MLS or M1—makes segmenting easier than you might think.

You start by pulling a "query," a data set from your AMS. You can pull queries based on different data points—such as name, address, certifications or designations, basically anything you collect in your AMS. The data is then typically exported into a spreadsheet (we use Excel).

Specific Segments

When segmenting, it's easiest to start with general topics and then work your way down to get as specific as possible. It really depends on the time and resources you can allocate. Here are a few examples to get you started:

MLS

My association owns its MLS, so that's an obvious segment. However, not all our MLS subscribers are association members in Alabama. Some subscribers are association members in Florida and Mississippi as we are geographically close to those state lines. So, we have two separate monthly newsletters. One goes to MLS subscribers, and we're strict about focusing on MLS tools and news in that newsletter. In the second newsletter, targeted to our Alabama members, we focus on association news, education courses and benefits. Do some people get two newsletters? Yes, but they're getting different information in each.

Member Education

My association started offering the Real Estate Business Institute's The Right Start program in 2021. It's a specific program, usually for newer agents, but veteran agents who need a lift in their business also benefit from it. In promoting it, we take a list of members who joined less than two years ago and combine it with a list from our MLS that identifies members who have had fewer than 12 transactions in the last two years, eliminating duplicates.

So, we focus on a very specific audience of newer agents and agents who might want to increase their productivity. Our Right Start emails and texts go only to agents who fall into either of these two categories.

Affiliates

Let's not forget our industry partners. Affiliates don't need to be overwhelmed with news that is for REALTOR® members. They have a specific purpose in the association, and it's not to know when the MLS will be down. Remember the value of your different member types and the roles each might have in their offices and in your membership.

Other Possibilities

With your AMS, the possibilities are endless. If you are associated with a commercial MLS, you probably have a spot in your AMS indicating that on your members' profiles. If you don't know how to pull that list, your AMS provider should be able to do it for you with some notice or even hop on a call to show you how to pull that information.

You can also use M1 to pull Certified Commercial Investment Members or other commercial designations and add them to that list—there's your audience for commercial news, updates and courses. This same practice could apply to property managers, if you collect that data from your members.

If you don't have the ability to have your MLS and AMS "talk" with each other to narrow down your lists, you can always put any lists you need to combine into a spreadsheet, where you can easily identify and remove any duplicates. Otherwise, if you are able to invest in email software such as MailChimp, the technology will automatically de-duplicate your email lists.

Outside of emails and text messages, your AMS may have a single sign-on where your members can access their accounts, MLS login screen, association news and more. This landing page is a huge opportunity. Talk with your AMS rep about creating different content for your member segments—whether it's posts just for designated REALTORS®, appraisers, members who need Code of Ethics training, property managers, members who speak a different language—really, for anything you collect and have in your AMS, there's a way to separate it and use it to communicate to members.

One More Piece of Advice

Segmentation is just one strategy. Another huge piece of advice is to use a communication calendar. Whether it's through an Excel or Google spreadsheet or a project management tool like Wrike, Workfront or Monday.com, you'll be much more organized and able to see all your communication in one place. It takes discipline to start a calendar and keep it up, but it will save you time in the long run.

Use a communication calendar—whether it's through an Excel or Google spreadsheet or a project management tool like Wrike, Workfront or Monday.com.

It's much easier to pinpoint your problems when you can see the big picture. For example, a communication calendar can help you see that you might be sending too many communications out in one medium and too few in another. It'll also help you determine whether you're sending too many messages to the same people.

Measurement is critical. Check the backend of your AMS communication center or email creation platform; pull the send times, click rates and open rates; and note those in your calendar or project management system. It's a great way to track the best time to send an email or text.

Follow the Rules

This is important: When sending any type of communication to your membership, always remember to review CAN-SPAM and ensure you're following all federal laws. There are guidelines you must follow: For example, you must include an opt-out method in your email, avoid deceptive practices, and include your contact information, etc. As far as text messages are concerned, you need to have explicit consent before sending marketing texts and must allow members to unsubscribe if they don't want to receive further messages. In addition to a member consenting to receiving messages on their membership application, they should receive a text from you in which they reply they want to continue to receive messages ("double opt-in"). The fines for violating these rules are hefty—you can't afford to ignore compliance.

A Few Final Thoughts

Are there exceptions to everything I just wrote? Of course. During emergencies or situations of interest to all association members or MLS subscribers (such as lawsuit settlement updates), go for it. Just remember that when communicating with your entire audience, the message needs to be an important one, or it needs to be consistent, like a newsletter. We send out our newsletter at the same date and time each month, and our members know when to look for it.

Remember too: It's not that you don't want members to hear from you. It's that when they do, you want them to know it's important and relevant to their business. So, be intentional and strategic. In today's world, with so much noise, associations need to make communications count, and segmenting your audience to cater information to your members is one of the easiest ways to start. ●

Allison Woodham, RCE, is the education director at Baldwin REALTORS® along the Gulf Coast of Alabama. You can reach her at allison@baldwinrealtors.com.

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Communicating well with your members doesn't have to mean a large investment. There are plenty of low-cost (and even no-cost) tools available to you.

BY DAVID KISSINGER, RCE

When is the last time you looked—really looked—at your outgoing email signature lines?

Many organizations think of the email signature strategically, as prime—but low-cost—real estate for boosting key messages. According to software vendor Exclaimer (exclaimer.com), an email signature has the benefit of "enhancing brand perception and consistency while providing necessary contact information in a professional manner."

Associations are rightly keeping a close eye on budgets and getting the most out of their marketing dollars. In justifying the value proposition for your outreach tools, associations can look to creative options that are easy on the budget. Email signatures are one of several low-cost or no-cost tools available for communicating with your members in a way that resonates with them. Your finance committee will thank you.

Your Signature Blend

At the Portland Metropolitan Association of REALTORS®, Communications Manager Brittany Powell Parich is making the most of email signatures for all of PMAR's staff. Using WiseStamp (wisestamp.com), she has set up a consistent, brand-friendly look to association emails. Every time a message goes out, the email signature includes banner links, graphic elements and social media icons.

Well, almost every time. "When we started, it was on every email, including replies, and that got really annoying. Now it only goes out on the very first email [in a thread]," not replies or forwards, Parich says.

Parich controls the message for all emails sent from PMAR. She can change the language when she needs to promote a certain brand story or event, "but my main goal was to keep control over our brand and keep emails professional looking," she says.

The cost to PMAR for uniform email signature branding is just $340 per year for 20 seats. "WiseStamp has tons of options," Parich says. "I chose it because of the ease of use and design [capabilities]."

Those with smaller budgets can manage email signatures manually by setting up a calendar of signature messages and using your email program's custom signature function to make changes as needed.

All the AMS Tricks You Didn't Know

Regardless of size, every association needs a way to efficiently manage its membership. This includes updating rosters, taking payments, managing education and events, and coordinating records with M1 and state associations.

By using the full capability of your AMS, you can streamline communications and reach your members where they are. At the Bakersfield Association of REALTORS® in California's booming Central Valley, CEO Derek Sprague, RCE, uses his association's AMS to funnel members through one portal via a single sign-on, or SSO, function for all association needs. That includes access to MLS, REALTORS Property Resource®, forms, personal data, fee payments, and class and event registrations.

"It's mission control for our folks," Sprague says about Rapattoni's Magic+ AMS's Connect Dashboard. "MLS traffic is high. It boosts SEO [search engine optimization] because members must go to the association's website to log in."

Other AMS and MLS providers offer SSO dashboards as well. An SSO dashboard may be a fit if you are trying to increase web traffic, highlight new agent tools or just offer an easier experience.

Your AMS likely has other features waiting to be found, such as committee rosters, donor lists and other data that can help you segment your member communications. (*See "Cutting Through the Noise," page 16.*) AMS providers, including Rapattoni, RAMCO and GrowthZone, allow data filtering, sorting, and removal of duplicates. Such features make it easier for communications staff to create up-to-date email lists without having to resort to passing around Excel files. If you need help, contact your AMS representative for support.

For more ideas, see "No-Cost Options Already at Your Fingertips," page 22.

Telling Your Story Organically

The Lubbock Association of REALTORS® in Texas is helping its members become social media storytellers, designating the go-to tag of #lbkrealtorstories for social media posts for both staff and members. Last summer, LAR created a Storyteller Ambassadors program (lubbockrealtors.com/storyteller-ambassadors), a group of members (but not a committee) dedicated to getting out good news stories, says Communications Director Brenda Fisher.

"This year, we want to change the narrative and showcase how Lubbock REALTORS® show up in their community," the website states on its dedicated page. "LAR is leveraging the power of social media to share our members' #lbkrealtorstories to show what a vibrant part of the community you are."

LAR is even getting affiliate members involved. "When Brenda invited us to be

No-Cost Options Already at Your Fingertips

These ideas are either free or their costs are baked into something else, like fixed overhead, existing technology or staff hours.

NEW-MEMBER ONBOARDING

Create a message or set of messages, as in a drip campaign, to bring new members what they need, when they need it. NoteRouter's Nick Gough says new members are three times more likely to pay attention than experienced members. He recommends these steps for better onboarding:

- Reach out to new members on the day they join and then seven more times over the next 90 days.
- Educate them on how you're going to help them succeed in their business.
- Don't talk about anything you want from them; instead, talk about advantages and opportunities you'll be creating for them.
- Automate this process and use templates from your outreach platform.
- Automate notes for birthdays and association anniversaries.

CONSISTENT BLOGGING

At the Pennsylvania Association of REALTORS®, Chief Growth Officer Kevin Juliano, RCE, CAE, says that they strive for one blog post every day. The diversity of content on PAR's blog, "JustListed," provides an opportunity to reach different members with different needs. Juliano says that PAR's RSS-generated emails achieve up to 60% open rates based on topics and drive click-through rates close to 50%. Here are some points to consider:

- Tools: Your existing website. Ask your IT or communications staff to ensure that blogging is available, which it almost always is.
- Cost: Existing costs to host and run your website, plus a certain amount of staff time for generating content.
- Sources: Elevating association volunteers and staff as thought leaders can help provide additional opportunities for identity building for the organization.

VIDEO AND SOCIAL MEDIA

Juliano says members are responding better to TikTok-style videos than to highly polished content.

Post shorts of up to three minutes on YouTube or 90-second reels on Instagram. These can have a wide reach when part of your overall social media strategy. You can shoot and post videos quickly from your phone or edit them for higher-quality production.

"There's a place for polished videos," Juliano says. But quick, unedited videos are less expensive and add a sense of authenticity and humanity to your message. Test different types of videos to see what resonates best with your members.

DOWNLOADABLE SOCIAL MEDIA ASSETS

Be sure that you and your communications staff are on the mailing lists for marketing materials available from the National Association of REALTORS® and your state association.

Every week, for example, the California Association of REALTORS® sends local associations a set of social media graphics, tweets and other assets that they can immediately drop into their accounts. The variety of topics includes Calls to Action, industry news, educational opportunities and more.

You can also download the Photofy app for NAR (signup.photofy.com/nar) to access customizable social content.

TRADITIONAL PUBLIC RELATIONS

Creating and promoting content in the realm of traditional public relations is less costly than advertising and can lend credibility to your message. Local news media need localized content and data. The largest cost for PR is generally staff time to create written and graphic content. Options for content include:

- Op-eds and letters to the editor: Short opinion pieces for your local newspaper or weekly magazine.
- Advertorials: Pay for placement of your written content. A good spot is in your local newspaper's weekly real estate listings section.
- Publication of local data: Offer to send local market stats on a regular basis to your local news outlets. They will publish the name of your association or MLS as the source of the data, which is an easy and brilliant PR move. Check your MLS rules, however; in most cases, the release of aggregate, non-specific data from your MLS should be compliant.

CUSTOMER SERVICE TRAINING FOR ASSOCIATION STAFF

Gough suggests that AEs and their communications teams learn to think and talk like a member.

"Your members are mostly small-business owners who wake up every day trying to figure out when and where their next paycheck will come from," he says. "Do they feel understood by your team? Do your subject lines and campaigns resonate with them? Everything your team does and says needs to be clearly tied to helping members grow their business or eliminating the pains they have." ●

part of the program, it was a no-brainer," says Bailee Porter, marketing and communications manager for Western Title. "LAR members do so much for not only their clients, but also affiliates like us. More positive stories should be shared about everything real estate agents do to get their clients to the closing table, and the affiliates they worked with along the way, too."

Good Old-Fashioned Office Visits

Sometimes, the best way to connect doesn't involve much technology at all. At Maryland REALTORS®, the association's staff members, including CEO Chuck Kasky, RCE, regularly visit brokerages, local association trade shows and special events.

"We want to make sure the members know and understand best practices and how best to show their value as a [real estate professional who is a] REALTOR® through their work," says Daniel Patrell, senior director of strategic communications at Maryland REALTORS®. "Maryland REALTORS® is looking to expand its outreach to its broker community in 2025."

Member calls and visits are time intensive. A dozen phone calls or just one office visit can take hours. To make it work long-term, aggressively set aside time blocks for outreach or grant yourself some grace if you keep getting pulled into other, more immediate tasks. At Maryland REALTORS®, one person cannot visit all the offices in the 30,000-member organization, so it is a team effort among staff, including the membership, government affairs and communications directors.

In our data-driven world, it's difficult to measure the impact of a personal visit or call. But as a communications tool, it is an opportunity to create a lasting and personal connection. One easy way to make it happen is to join a brokerage's weekly or monthly sales meeting. Bring doughnuts or bagels and a healthy supply of information, including MLS updates, event announcements and talking points on industry news.

Also consider these tips for personalized member contacts from your association:

- Call brokers and members in the same way that that they might call their sales prospects. Start with just checking in and keeping in touch.
- Regardless of your association's size, it may not be easy to figure out whom to call first. Go down the list alphabetically? By ZIP code? From large to small? Try different options and go with what works.
- Contact your most connected members first, but don't stop there. The 1999 *New Yorker* magazine article, "Six Degrees of Lois Weisberg" by Malcolm Gladwell (newyorker.com/magazine/1999/01/11/six-degrees-of-lois-weisberg; note that sign-in is required to read the full article), explains that it was quantity, not the quality, of Weisberg's connections that set her apart. Also check out Gladwell's book *The Tipping Point*.
- Consider adding your association as an "additional insured" on the personal car insurance of those who regularly drive to brokerages for association business. In many cases, there is no additional premium charge for this extended coverage. Consult with your attorney, check the laws in your state, and read the coverage conditions on your and your staff's insurance policies to see if this added coverage is right for you.

Where to Go From Here

Member communications is a critical part of running an association and may also be one of the most time- and resource-intensive tasks for you and your state.

How will you know if you are doing the right thing? The magic word here is "resonate." What resonates with your members? They will respond to some communications tactics and not others. What works for you might not work for your neighboring associations, and what worked this month is not guaranteed to work again next year. The best thing to do is to just get started, check in often with members and stay nimble. ●

David Kissinger, RCE, is the former association executive for the Glendale Association of REALTORS® in Los Angeles County, Calif. Previously, he was the director of government affairs for the South Bay Association of REALTORS®, Calif. He has worked for REALTOR® associations since 2006. Earlier in his career, he worked in the public sector, in public relations and as a freelance journalist.

Look for New Opportunities to Connect

EMAIL SIGNATURE BRANDING

- WiseStamp: Pricing starts at $1.50 per user per month. wisestamp.com
- Exclaimer: Pricing starts at 90 cents per user per month. exclaimer.com

BULK EMAILING

- NoteRouter: Bulk emailing integrates with widely used association management software. noterouter.com
- Engage: Rapattoni will shortly offer this bulk email as part of its AMS, Magic+. rapattoni.com
- Constant Contact: Basic pricing starts at $12/month. constantcontact.com
- Mailchimp: Pricing starts at $20/month for up to 6,000 monthly emails. mailchimp.com

BULK TEXTING

- AMS providers such as iMIS and Rapattoni AMS (pending) include texting. GrowthZone allows push notifications via its mobile app. Pricing varies.
- Or try Twilio, 1 cent/message, twilio.com; Constant Contact, $10 per month, constantcontact.com; Bulk SMS, 34 cents/message, bulksms.com; and SimpleTexting. $39/month, simpletexting.com.

Remember that state laws may require members to opt-in to receive texts.

PHONE MESSAGING

- Slybroadcast: Send thousands of voicemail messages directly to your contacts. Pay-as-you-go plans begin at 100 deliveries for $10 and 1,000 deliveries for $60. Monthly plans are also available. slybroadcast.com

EASY SOCIAL SHARING

- Clearview Social: Includes list management, prompts and one-click sharing. Pricing starts at $425/month for 50 employees. This price point may not be your idea of "low cost," so analyze the number of social media posts, employees and members this will affect to determine if its scale fits your budget. clearviewsocial.com

Trademark Rules

Associations must lead by example with proper contextual use of the REALTOR® marks. **BY CHLOE HECHT**

For more than 100 years, the REALTOR® marks have differentiated National Association of REALTORS® members from nonmember real estate professionals. The REALTOR® marks signify members' commitment to NAR's Code of Ethics, which obligates members to protect clients and the public and to conduct business with integrity and at the highest standards of real estate services. Members' license to use the REALTOR® marks is one of NAR's most valuable member benefits, and NAR's trademark rules are designed to protect and promote the REALTOR® brand.

Associations' proper use of the REALTOR® marks reinforces the meaning of REALTOR®, encourages members and other associations to use the marks properly, and demonstrates to others how the REALTOR® marks may be leveraged in promoting membership and the association's value.

Incorrect uses, on the other hand, can lead others to believe that these misuses are proper or give associations and members an excuse to similarly misuse the marks. Instances of misuse undermine NAR's ability to protect the REALTOR® marks for members and associations.

Associations' contextual use of the REALTOR® marks—including in advertising campaigns and other communications that are widely disseminated—is particularly important. NAR's trademark rules require contextual uses of the REALTOR® marks to include a direct reference to association membership in the same sentence or phrase.

Direct references include use of the association's name, general references to associations, the Code of Ethics, the meaning of REALTOR® and major association activities, such as committee participation. Proper contextual uses also include "agent and a REALTOR®" or "agent who is a REALTOR®," because this language informs the reader or listener that being a REALTOR® is in addition to and different from being a real estate professional.

For example, the sentence "Sarah is a REALTOR®" is improper because it does not include the required direct reference to membership. Here are some ways to correct this misuse:

- Refer to specific association membership: "Sarah is a REALTOR® and volunteers often with the Lakeside Association of REALTORS®."
- Connect to an association in general: "Sarah is a REALTOR® and participates in her local association's events."
- Include ethical standards: "Sarah is a REALTOR® and abides by the Code of Ethics."
- Include the meaning of REALTOR®: "Sarah is a REALTOR®, a member of the National Association of REALTORS®."
- Refer to a major association activity: "Sarah is a REALTOR® and participates in committees at the local, state and national levels."
- Include vocational title and trademark: "Sarah is a real estate agent and a REALTOR®," or "Sarah is an agent who is a REALTOR®." Please note that a different vocational title, such as "real estate professional" or "broker," could be used instead of "agent."

Trademark owners are legally obligated to ensure their trademarks are used properly. If a trademark owner fails to police use of its trademarks, the protection afforded to it under federal law may be lost forever. For example, the words "escalator" and "aspirin" were once valuable brands, but these terms are no longer trademarks because their owners did not adequately protect them. This is why it's vital that the REALTOR® marks are used properly.

If you are unsure whether your association's uses of the REALTOR® marks are proper, please do not hesitate to contact NAR Legal Affairs at trademark@nar.realtor.

Chloe Hecht is senior counsel, legal affairs, at the National Association of REALTORS®.

It's Mandatory

NAR's Governance team tackles your questions on the new mandatory bylaw provisions and MLS rules and regulations. **BY DANIEL DOEPKE**

With changes to the mandatory bylaw provisions and MLS rules and regulations going into effect this year, associations will need to certify both sets of governing documents by March 1. The National Association of REALTORS® has staff experts and resources to help.

Here are some of the top questions we've received regarding bylaws and the mandatory provisions.

Q: We've made some changes to our bylaws. Do I have to submit them to NAR for review?

A: Those of you who have been association staff for a while might remember a time when local associations were required to submit bylaws and MLS rules and regulations to NAR for review annually. This was not a comprehensive review process for local bylaws; NAR would review only the mandatory provisions required by the national association to be included verbatim.

In 2018, NAR streamlined that process. Associations may now review their own bylaws for the mandatory provisions and self-certify that their bylaws are up to date. The process was also updated so that governing documents did not need to be certified annually. Recertification would be necessary only if and when NAR made changes to any mandatory bylaw provisions or MLS rules and regulations.

In 2025, because there are changes to both the mandatory bylaw provisions and MLS rules and regulations, your association will no doubt be examining your bylaws. **As a reminder, both sets of governing documents must be certified by March 1.** The certification form can be found at nar.realtor/about-nar/policies/bylaws-certification-process-information-and-resources. Remember that your Errors and Omissions insurance coverage can be affected if your bylaws don't contain the mandatory provisions, so it is important that your bylaws are up to date.

Q: What are the mandatory bylaw provisions? Are they the same as the model bylaws?

A: Mandatory bylaw provisions are the handful of bylaws that NAR requires each association to maintain. They can be found by clicking on the "View a Sample of the Certification Form" link on the webpage listed above. These are different from model bylaws, which are a set of standardized bylaws that associations can use and build from to create functional governing documents.

NAR stopped updating and publishing model bylaws in 2018. Instead, it created a series titled "Good Sense Governance" (nar.realtor/about-nar/policies/good-sense-governance), which associations can use to implement sound governance practices and create solid governing documents based on the needs of each individual association. However, those who want to use the model bylaws as a guide may email narpolicyquestions@nar.realtor to access them.

Q: The categories of membership listed in the mandatory provisions are different from what we have in our bylaws. Is that OK?

A: This can be a fairly common occurrence, as some associations offer affiliate memberships to professionals in real estate–related fields, such as staging or landscaping, that include specific benefits and requirements. Associations can create and offer these kinds of memberships to individuals who don't meet the qualifications of REALTOR® membership but who may otherwise benefit from affiliating with a REALTOR® association.

However, affiliate memberships are completely at the discretion of local associations and therefore not a mandated membership type found in the mandatory bylaw provisions. ●

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

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The 4 Golden Rules

Start here to build a collaborative relationship with your volunteer leaders.

BY CAROLE KAPTUR

Association executives and volunteer leaders have something in common: We all want to work better together for the good of the association. So, why does it sometimes seem difficult?

The simple answer? We're all different. We come from different backgrounds and have different perspectives and goals. These differences can give rise to confusion, misunderstandings and sometimes personal agendas.

The question that follows is this: How do we get beyond all this noise and work more collaboratively? We can't always change other people, but we can take action ourselves. So, in no particular order, consider these four "golden rules":

1 Be respectful. It seems elementary that to be respected, we must respect others. While some people start with a premise of respect toward others until trust is broken, others feel respect must be earned.

But being respectful is a choice we can make. To do so, keep in mind that everyone has something to contribute, whether it's agreeability, a new twist on someone else's idea or a fresh way to look at a situation.

It can be harder to be respectful of people who offer a contrary opinion—and who do so in an aggressive manner. But maybe they see something others don't, and they're expressing it in their style. It's human nature to have strong reactions to a dissenting view—especially one offered in a combative way—but try to remember that there's always something we can learn. As the saying goes, showing respect to people, especially when you think they don't deserve it, is a reflection of your character, not theirs.

2 Consider the needs of others. Everyone wants to contribute and feel significant, whether the person is paid or a volunteer. In that search for significance, it's possible for a staff person or volunteer to blur the lines of who does what. When communicating with others, that person might not be thinking about their role but instead about their input.

So, if someone steps over a line, rather than getting upset and starting to defend your territory, stop and think about what that person needs. Most likely, they simply want to contribute. They want to add value, and the desire to add value may not go any deeper than that.

3 Listen for understanding. Can we truly say we always listen to understand what others

> “If someone steps over a line, rather than getting upset and starting to defend your territory, stop and think about what that person needs.”

are saying—or are we too busy formulating our reply to listen? If we’re honest, most of us would probably admit that we aren’t actually listening as carefully as we should.

To have an idea of what it means to really hear what someone is saying, imagine you’re blindfolded and can’t be distracted by things going on around you. This forces you to genuinely hear. In your next conversation, you’ll likely find you are less defensive and more responsive.

You can also develop the habit of responding with, “If I hear you correctly, you’re saying XYZ,” to ensure you fully understand the conversation. You can also use a form of this to clarify meaning when communicating through email, which is known for creating confusion and misunderstanding.

4 Give up the need to be right. Admittedly, this can be difficult. In the same way we all want significance, many people want to be “right,” even if they don’t actually have all the answers. Remind yourself there is often more than one solution to a problem and more than one way to approach a situation. Allow yourself the grace to try to select the best option and know that option may come from someone else.

Giving up the need to be right goes hand in hand with choosing your battles. Let others have their way, and if it works, great—problem solved. If it doesn’t, then you have an opportunity to save the day without appearing to be a know-it-all. Most of the everyday “battles” we face are not worth the effort we put into them, so be selective and choose the ones that truly matter. You’ll find respect is afforded you for being thoughtful and deliberate. People will know that what you say is important when you speak up selectively and not constantly, and they will tend to credit you with respect and credibility.

Keep in mind, too, that when people don’t abide within the boundaries of their role, it may happen without their realizing it, because of our fundamental need to belong and to contribute.

Three tools (*see right*) are available to help AEs and volunteer leaders have a better understanding of their roles and responsibilities. These tools have been developed through AEC Work Groups consisting of other AEs. Use them with every change in leadership, and you’ll develop a collaborative, supportive leadership culture. ●

Carole Kaptur, SHRM-SCP, RCE, is director of human resources with NAR.

TRY THESE TOOLS

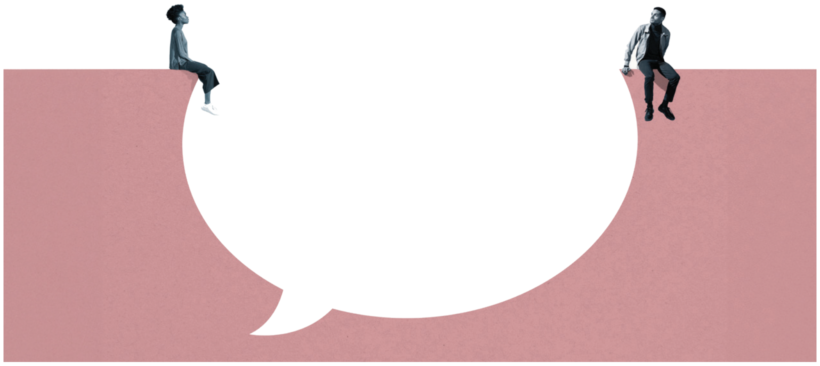
Principles of Association Volunteer and Staff Leadership

AE/Volunteer Relationship Toolkit

President/AE Checklist

> “For associations to be successful, the president and AE should have mutual respect for each other’s strengths, abilities, opinions, challenges, sacrifices. . . . They need to recognize their unique roles and commit to work in partnership to fulfill their roles. It is important these individuals realize they have different perspectives, competencies and knowledge. To successfully collaborate, there must be open communication about issues and concerns and the commitment to successfully resolve conflicts.”

—From the AE/Volunteer Relationship Toolkit
nar.realtor/state-and-local-leadership/ae-volunteer-relationship-toolkit



Know Your Audience

And avoid the dreaded 'failure to communicate.' **BY BOB TAYLOR**

Every association executive experiences the frustration of having a "failure to communicate" with their members. My first exposure to this problem, however, was long before becoming an AE.

While I was attending a Certified Real Estate Brokerage Manager course in 1984, instructor Art Godi—1996 National Association of REALTORS® president—asked us to engage in two exercises.

First, everyone in the room glanced at a picture. Then, several people were invited to describe 10 things in that picture. Interestingly, no one ever described the picture the same way another person recalled it.

The second exercise was the old children's game of telephone. One person would read a written phrase, then whisper it to the person on their right. This person would then whisper what they heard to the next person, and so on, until it was whispered back to the originator, who would then repeat what they heard out loud. The final iteration was never the same as what was on the piece of paper.

The lessons were that—regardless of how careful you are when communicating—everyone sees the same thing differently (activity No. 1), and poor communication is most frequently the fault of the sender, not the receiver (activity No. 2).

Potential Differences in Perspective

	AE	Member
Perception	Strategic	Transactional
Details	Very specific	General
Specific rules	Black and white	Lots of gray area
Definition of "No"	"No"	"Need more information"
Hours of work	9 to 5, Monday to Friday	24/7
Responsiveness	Leave a message	Need it now
Compensation	Regular/fixed	Irregular/variable
Information value	Need to know	What's in it for me?

It's common knowledge that when communicating, it's good practice to always consider who your audience is and what is most important to them. The difficulty is that our members tend to think differently than we AEs do *(see the box below)*.

It's also important to consider how you are going to communicate. Text, email, phone call, social media and video are all options. Remember two things, however: A message in a digital format lives forever, and with screenshot technology, no message should ever be considered private.

With all this in mind, let's consider some best practices:

No. 1: Ask this: To whom do you wish to communicate? Are you sending your message to a broker, a top producer, an industry volunteer or an agent? Our members receive hundreds of messages weekly, if not daily. If you send the same message to everyone, hoping your target audience will read it, odds are after more than a month of that, your messages are going to spam.

No. 2: Select your words carefully. Just because you intend your words to be read a certain way does not mean they will be. Also watch your grammar and punctuation. You can use a product like Grammarly, but do not allow artificial intelligence to be your author—only use it as an asset to add to your message.

No. 3: Anticipate a response and be prepared. Communications done well generally require recipients to think about what you sent. If not, it might not be worth sending. Consider how your message will be perceived and prepare staff to respond unless you want to take all the calls yourself.

No. 4: Wait before sending a message or making that phone call. Reread your message at least twice, with at least one time being out loud to yourself. You will be surprised how frequently what appears to make sense on paper does not sound right.

No. 5: Have your message reviewed by someone who will give you honest feedback. For example, if you think this article is coming to you as originally written, think again (my thanks to the AExperience editorial team).

Finally—and this may be the best practice of all—put yourself in the shoes of your recipient. This one action will significantly improve your communications. Not doing so—in the immortal words of the villainous Captain in the 1967 film *Cool Hand Luke*—will result in a "failure to communicate." ●

Bob Taylor, RCE, is CEO of the Grosse Pointe Board of REALTORS® in Michigan.

NAR's REALTOR® VOLUNTEER DAYS

MAY 10 - 18

Plan a **volunteer activity** and **rally your members** by using the marketing materials in our toolkit.

See full details and access the toolkit at **nar.realtor/rgn/volunteer-days**

Follow us at **@realtorsaregoodneighbors**
#RealtorsAreGoodNeighbors #RealtorVolunteerDays

NAR

The Language of Leadership

Florida REALTORS® CEO Margy Grant

One secret to effective member communications is meeting members where they are, says Florida REALTORS® CEO Margy Grant, RCE, CAE, whether that's "texts, calls, targeted emails, resources on floridarealtors.org or our social media channels." Grant, who is newly inducted into the Dr. Almon R. (Bud) Smith, RCE, AE Leadership Society, shares more of her insights on what good communication—and especially communication during a crisis—looks like.

With the challenges our members have faced in the past year, what's been an effective communication method for you?

My cellphone number is the worst-kept secret. Members and local association executives know I am accessible, and if I am not, I will return the call or make sure someone connects with them.

What software do you lean on to help make formal communications effective?

We use the same channels our members do; for example, we rely heavily on email and Zoom. On a governance level, we adopted the same software the National Association of REALTORS® uses for The Hub (we call it The Voice).

Several hurricanes struck Florida at the end of last year. How is Florida REALTORS® communicating with members and supporting relief and rebuilding efforts?

As of Jan. 12, the Florida REALTORS® Disaster Relief Fund had given nearly $715,000 in grant assistance to help those struggling to recover, and the REALTORS® Relief Foundation had given nearly $230,000 in grant funding for Floridians who were impacted.

Our 2024 Hurricane Resource Guide has also been a great resource, with valuable links, phone numbers and web addresses of agencies that can help association members, businesses, homeowners and renters get back on their feet. It's located at the top of the larger Hurricane Resources section of our website (floridarealtors.org/tools-research/hurricane-resources), which features what associations should do before and after a hurricane and more. We also shared infographics via social media on how to use our tech helpline and legal hotline if members need assistance, as well as the state's Disaster Unemployment Assistance program.

What's your best advice on how to communicate both before and after a crisis, such as a natural disaster?

Probably three things: First, use technology. Following Hurricane Maria in 2017, we overhauled our application process for disaster assistance. It is 100% online, and all documents and pictures go to a Dropbox folder. It allows quick turnaround for grant checks to go out. Second, over-communicate. In a time of disaster, members will miss the first few messages, so use different media, like socials, email and even text. Finally, keep it simple. Have a one-stop place for impacted members to obtain information. A resource center on your webpage is invaluable to those struggling after a storm.

Finally, can you offer one sentence on how to be a good communicator?

Because it is so critical to meet people where they are, both by medium and tone, Peter Drucker reminds us, "The most important thing in communication is to hear what isn't being said." In other words, we might need to dig a little deeper to understand what our members need. State associations are a critical resource for local boards, members and staff professionals, who need the faith and confidence that we are here, not just when we are advancing one of our [state association] initiatives, but also when they need guidance in a disaster or changing market. ●

Good Neighbor Awards

> **The exposure from the Good Neighbor Award has been a game-changer. It's brought incredible awareness to our mission, allowing us to serve more young people on the autism spectrum and bring more inclusion and friendship into their lives.**
>
> ***Stacy Horst***
> *Co-founder, Erin's Hope for Friends*

REALTOR® Stacy Horst and her husband Darren founded nonprofit Erin's Hope for Friends following the tragic loss of their 17-year-old daughter, Erin, who took her own life after years of being bullied. The weekend clubs are a supportive space for teens on the autism spectrum to foster lasting relationships through joyful interactions.

2025 ENTRY DEADLINE APRIL 18

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