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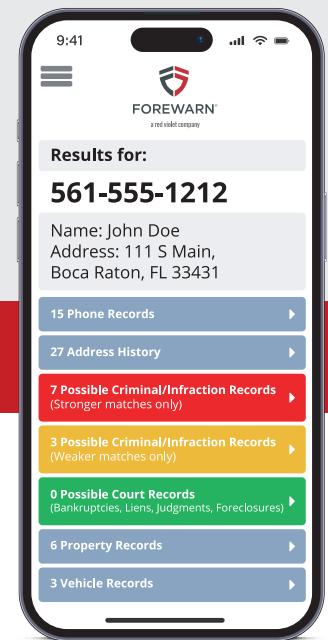
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NATIONAL ASSOCIATION OF REALTORS® OFFICIAL PUBLICATION



FALL 2023

CONTENTS



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10 New Ways to Work

Employees expect flexibility, members want results: How AEs are navigating shifting norms.

16 When You're a Staff of One

Nine AEs from across the country share the good, the bad and the ugly of being the sole staff member at their associations.

20 Getting Your Organization into Alignment

When your structure and processes make sense and your staff are well suited for their jobs, you have a smoother ride to success.



05 AEC Chair

The Workforce Has Changed

06 AOR in Action

News and Ideas From Your Peers

24 SentiLock

Two Decades of Innovation

26 Governance

A Primer on Secondary Memberships



28 Mind of the Member

Consider Your Staff

30 AE Leader

South Shore REALTORS®'

Rachel Tristano



ON THE WEB

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Culture Change

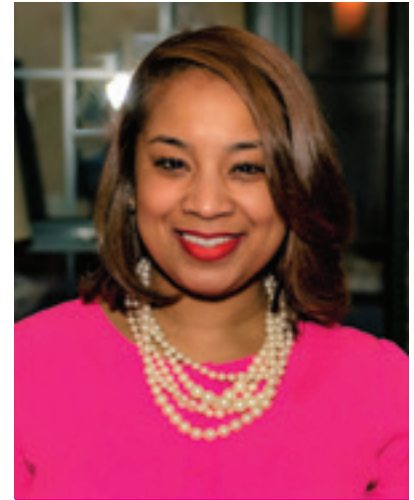
Nearly 500. That's how many association executives joined with National Association of REALTORS® leadership on a video call in mid-September to talk over questions, concerns and our path forward after staff and member complaints about harassment and intimidation spilled into national news headlines.

This is not a place any of us would have wished to be. Still, I am encouraged that so many of us are talking about an issue that can be difficult for AEs to confront on our own. No doubt, we will continue to discuss what is needed to build new and better safeguards and procedures, and to examine how leaders are selected and how they interact with AEs and their staff members. All of us can take part in supporting a safe, inclusive environment where staff and leadership work together respectfully and transparently.



It's important that each and every one of us take this moment to learn and focus on doing everything we can to ensure a welcoming culture.

To that end, NAR has engaged Shaun Harper—a University of Southern California professor and the founder of the USC Race and Equity Center—to examine the organization at every level and to help us bring about positive change. Dr. Harper will be guiding a new culture project advisory group, the



Jessica Coates, RCE, is CEO of the Sacramento Association of REALTORS® and 2023 AEC chair.

Culture Transformation Commission, as it develops key recommendations. While the effort is still evolving, it will include contributions from state and local AEs, NAR staff members and NAR members. As we heard on the call, AEs were invited and encouraged to nominate themselves for the commission or to provide input.

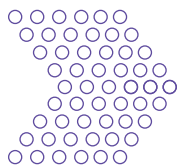
I know that many people have been hurt and disappointed by the information reported by *The New York Times* and have expressed anger that more wasn't done to address staff and member complaints. We know there's a lot of work to be done. We also know that when an issue arises, our members and employees must feel safe to say something and feel heard.

It's important that each and every one of us take this moment to learn and focus on doing everything we can to ensure a welcoming culture. What makes for a successful office culture? Daniel Coyle, author of *The Culture Code*, cites psychological safety and shared vulnerability as two critical ingredients.

To bring about positive change, we need to be open and willing to adapt. Let's all do what we can to ensure the REALTOR® organization, at every level, is a safe, respectful environment for staff and members.

AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS



COMMUNITY

Relief in Sight

In August, as smoke continued to rise from communities devastated by wildfires on the Hawaiian island of Maui, the REALTORS® Relief Foundation delivered \$1.5 million of disaster relief aid to Hawaii REALTORS® in support of the REALTORS® Association of Maui as it works to help victims with short-term housing assistance.

As of the end of August, RRF had awarded \$6.9 million this year to 18 additional state and local associations to support disaster relief efforts. Every dollar donated goes directly to help victims of natural disasters, and any association may apply for assistance after an emergency that has been declared a major disaster. Here are a few others that have done amazing work with the help of RRF funds:

Arkansas REALTORS®: REALTOR®

Sherrye McCoy, GRI, helped storm victims pull their belongings from what was left of their homes, and past president of RRF Mike Ford helped draw up plans for command centers that distributed \$1.75 million in RRF grant funding. They're just two of many association members who stepped up to assist more than 860 families after an EF4 tornado struck near Little Rock and Wynne in March.

"We had the resources, we had manpower and we had the passion to pull it off," says BJ Matthews, GRI, AHWD, director of public relations and meeting planning and director of Hearts & Homes of Arkansas Inc. at Arkansas REALTORS®.



Shawnee Board of REALTORS® distributed \$150,000 in funds to help more than 350 families cover a month's mortgage or rent.

SHAWNEE BOARD OF REALTORS®

Shawnee Board of REALTORS®, Oklahoma:

"As REALTORS®, we help make dreams become a reality, and when a natural disaster comes and destroys that dream, it only made sense that the Shawnee Board of REALTORS® stepped up for our community," says Beth Beshears, association executive.

With its own office hit by a supercell thunderstorm that produced at least 18 tornadoes in central Oklahoma, the association distributed \$150,000 in funds to help more than 350 families cover a month's mortgage or rent.

East Valley Association of REALTORS®, Redlands, Calif.:

In February and March, California's San Bernardino Mountains were buried in snow as "once-in-a-gen-

eration" storms dumped hundreds of inches of powder in various areas, causing both home damage and displacement for hundreds of families. East Valley Association of REALTORS® started small with donation drives for shovels and other snow-clearing tools, but it also applied for and received \$250,000 from RRF to help homeowners.

"While we are still in shock and so sad over the loss of our home and all of our possessions due to a gas meter explosion on March 4, the kindness and concern shown to us by the EVAR truly shows us the very meaning of community outreach and support," wrote one family who received a \$2,500 grant.

 [nar.realtor/rrf](https://www.nar.realtor/rrf)

Oklahoma Association of REALTORS® is the latest association to launch its own home listing site. Oklahoma. RealEstate came online in April and consistently receives thousands of unique visitors every month. So, we asked CEO Jessica M. Hickok, RCE, CAE: What can other associations learn from your experience?

"All listings at Oklahoma.RealEstate lead back to the listing broker. With this focus, we are ensuring that home buyers will receive knowledge, guidance and personalized insights. The site is also so much more than a home listing portal. It includes a REALTOR® search portal, informative blogs, homebuyer savings account information and other helpful resources.

"One of the challenges that comes with launching a website like Oklahoma. RealEstate is marketing the website to consumers and REALTORS®. We've focused on gaining traffic through targeted digital, social and programmatic radio advertising. We are also working on producing a television advertising campaign. In the long run, we want this website to be the platform our members use when sending listing information to a client, we want members to post and promote the content, and we want Oklahoma.RealEstate to be a tool that connects REALTORS® and consumers through all steps in the purchase process."





MARKETING

Consumer Advertising Works

When it comes to promoting their members to the public, associations can always lean on assets from the National Association of REALTORS® That's Who We R national consumer advertising campaign. "NAR's advertising templates provide us a solid starting point," says Northwoods Association of REALTORS® Association Executive Matt Seegert, who modified a campaign asset to create print and radio ads for his region, a popular tourist area in Wisconsin; the only costs were for the ad buys. He adds that metrics such as home prices and membership counts are both up, despite higher mortgage rates. That's all "while still adhering to our thrifty budget."

Other examples include:

- **Georgia REALTORS®** invested \$10,000 in print ads for programs at Atlanta Braves and Atlanta Falcons games and ran 11 geofencing campaigns at \$150 each to send ads to the social media accounts of attendees at select games and at home shows and other special events. Its digital advertising media spend totaled \$150,000 and included social media plus ads at restaurants, bus stops, gas stations, grocery stores, gyms and salons. With a goal of reaching 17 million impressions through November, GAR had already racked up 4.5 million Facebook impressions, 3.6 million digital ad views and 70,216 geofencing views as of the end of August. "Cox Media is reporting a click-through rate of 5%. The industry standard is 0.1%," says Brandie Miner, GAR's chief communications officer. "They have actually asked us if it would be OK for our campaign to be used as a case study."

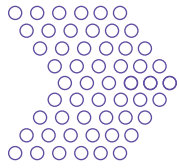
- **Greater Portland Board of REALTORS®** in Maine wrapped a public bus in colorful, eye-catching messaging—part of a broader three-month campaign to raise local awareness of fair housing and engage members. "Unsolicited, positive responses from the public have already been received, including from a local businessperson who had no idea that REALTORS® supported fair housing and DEI," says Kris Dorer, AE. "A public member of the LGBTQ+ community also sighted the bus in action and proudly shared with us!"
- **Northern Virginia Association of REALTORS®** invested \$1,500 to mount "That's Who We R" in bold metal letters in its office as a rallying cry for its members. While the signage is a great backdrop for members for social media or meetings, Frank Doyle, RCE, CAE, chief operations officer, adds that the tagline is also used in internal and external ads, announcements and even video ads at luggage carousels in Dulles International and Reagan National airports. "Ultimately, the 'That's Who We R' signage is really just a great gathering place for members to associate with each other and publicly demonstrate their commitment to the professionalism of the real estate field," Doyle says.

New That's Who We R assets are released periodically. Watch for the final 2023 assets in early November, prior to NAR NXT.

nar.realtor/thats-who-we-r

Clockwise from top: New metal signage inspires members; advertising is directed to home buyers in a tourist area; an Atlanta Braves program ad is part of a larger focused strategy; and a colorful bus wrap raises fair housing awareness.





AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS

COMMUNITY

Associations Are Good Neighbors

Serving food, repairing homes, cleaning public spaces, putting together personalized care packages: These are just some of the ways REALTOR® associations served their communities during REALTOR® Volunteer Days, June 3–11. Associations give back year-round, and this year, nearly half of REALTOR® associations held Volunteer Days events.



Southwest Virginia Association of REALTORS® members helped prepackage meals for families facing food insecurity.



Tabitha Thornhill, 2023 president of **East Central Board of REALTORS®**, tackled a demo with Habitat for Humanity.



Shari Howard, chair of the community service and outreach committee at **Prescott Association of REALTORS®**, volunteered at Meals on Wheels, helping to stuff more than 350 care packages.



Kim Cargill, Helping Hands Committee chair at **Clarksville Association of REALTORS®**, was among those volunteering at the Montgomery County Animal Shelter.

TOP: SOUTHWEST VIRGINIA ASSOCIATION OF REALTORS®; BOTTOM, FROM LEFT: EAST CENTRAL BOARD OF REALTORS®, PRESCOTT ASSOCIATION OF REALTORS®, CLARKSVILLE ASSOCIATION OF REALTORS®



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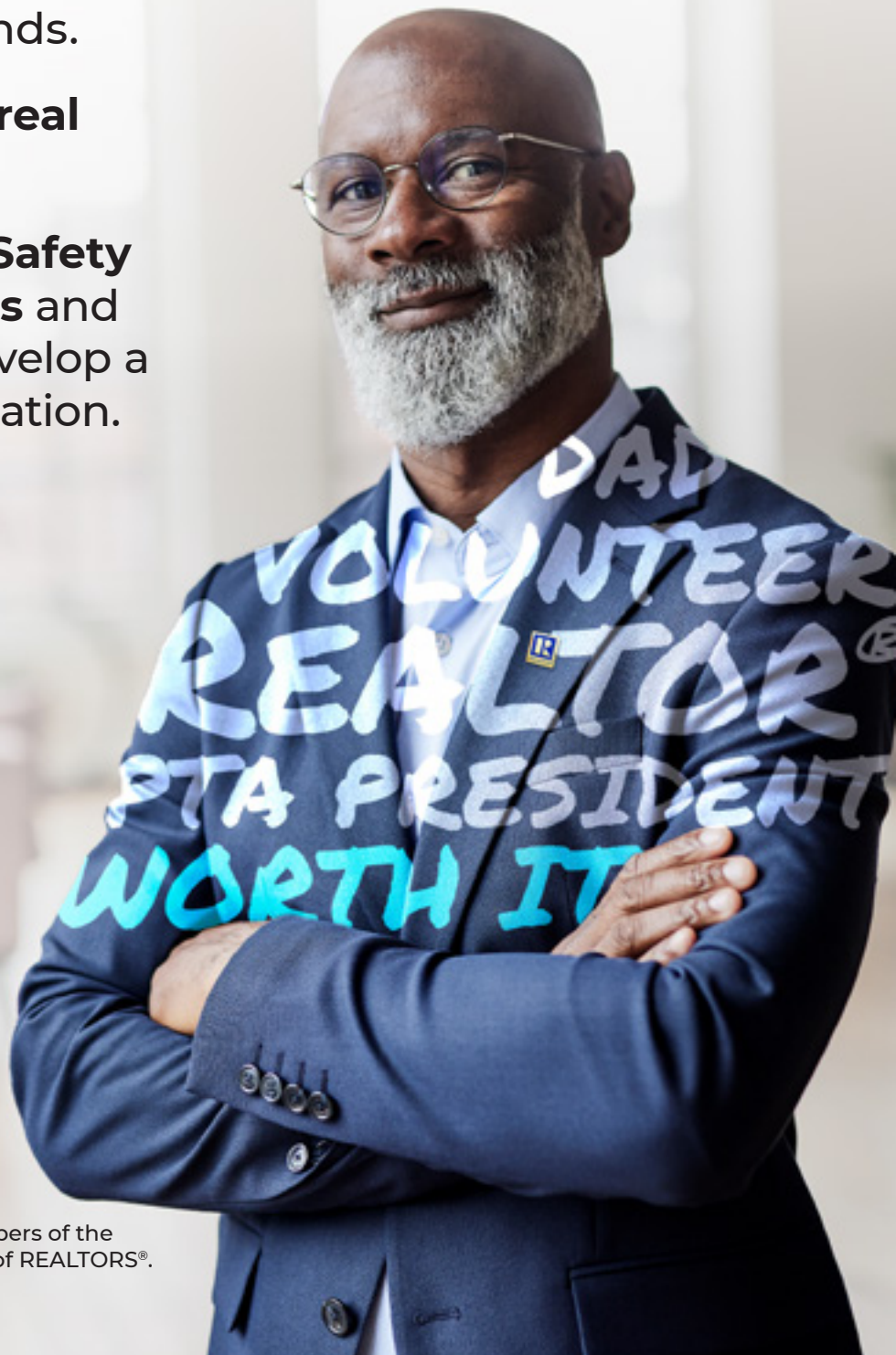


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NEW WAYS TO WORK

AEs are managing the shifting norms of workplace flexibility.

BY ERIC JOHNSON

Like everyone else, association executives had to navigate the COVID-19 pandemic without a map in the glove box or a GPS on the dash. When the world was shut down, all lanes merged home.

Now, however, that single lane has opened into a confusing interchange of options and employee expectations, starting with what Tricia Thomas calls the “Why” question.

When the subject of remote work comes up, “that’s the first question anyone is going to ask,” says Thomas, RCE, CEO of Bay East Association of REALTORS® in Pleasanton, Calif. “If I’ve been able to do my job and do it well in the last two years, whether hybrid or virtual, then why do I have to come back into the office?”

Not every AE has the same answer, but learning how others have navigated the

return to business as usual—and thinking through the potential hazards along the way—can help you find the right answer for your association.

A Head Start

Before the pandemic, DaVina Lara, CEO of Bridge Association of REALTORS® in Berkeley, Calif., had already explored the work-from-home landscape by allowing a couple of key employees to relocate, including her chief operating officer, whom she considered too valuable to lose despite his desire to return to his home in Chihuahua, Mexico.

Now, in addition to her COO, she has one employee in Las Vegas and another in Washington state—and she lives in Southern California. “I’m a unique breed in the industry,” she says. “I’m running an association located in the north from the south.”

K



Thomas also got a jump on the pandemic. Given California's history of earthquakes, floods and wildfires, planning for an office shutdown seemed like insurance against the inevitable. That insurance paid off in March 2020.

"We shut the doors by noon [in response to the state's pandemic shutdown orders], and we were up and running no more than a minute later," she says. "Because we'd done some dry runs, we were able to move quickly to virtual without being concerned about what the consequences were going to be. That made me as a CEO more open-minded about the possibilities to create flexibility for the employees moving forward."

For Thomas, post-pandemic, flexibility doesn't mean 100% remote. That's because preserving the culture of the office is a lot easier to do when people are physically present, she says. Although fully remote during the pandemic, save one employee who checked on the property during the shutdown, her 33-member staff is now roughly 10% virtual, 60% hybrid and 30% in-person—a percentage that's more organic than prescriptive.

"We looked at what the jobs had become and how performance was for each individual and tried to adjust to the needs of the organization," she says. "If virtual was going to work for the organization, then we allowed them to remain virtual. But when the shutdown ended, we needed some of the positions back in the office, like meeting and event planning, which literally couldn't be done remotely."

On the other hand, Lara flipped Thomas' "Why?" question on its head. For her, the question was "Why not?"

"As we started to transition back in, I started to look at the statistics and at how other, larger companies were embracing that hybrid or work-from-home environment. I approached my board members and said, 'Let's really look at the necessity of bringing the staff back in.'"

On the MLS side, Lara and her board decided there was not a need because there was no face-to-face interaction



DaVina Lara, right, CEO of Bridge Association of REALTORS®, attends an event with past President Janine Hunt, left, and current President Felicia Mares Villa; typically, Lara works from her home in Southern California.

BRIDGE ASSOCIATION OF REALTORS®

with members. On the association side, they decided there was not a need because what had become the status quo was working fine: Onboarding was being successfully handled online, lockboxes were being successfully distributed by appointment (a process that was developed and refined during the pandemic) and virtual training was being well received, even in the post-shutdown environment.

Now, the association does some live events, some hybrid events and some virtual events, but the day-to-day operations remain virtual, a practice Lara says is still very much supported by her membership and her board—as is the fact that she lives in Southern California. The attitude, she says, is "If we can call you up and you can get it done, get it done."

By contrast, Meighan Harris, RCE, CEO of Bonita Springs-Estero Association of REALTORS® in Florida, brought her people fully back into the office in the spring of 2023 after what she calls a "tapered" return.

"We're here to serve the members, and when I started to see a bit of strain or that it was taking away from the service the members were getting, it was time to call it quits," she says. "I told them I'd always make considerations, but [remote is] not our normal way to work anymore."

Similarly, Jessica Coates, RCE, CEO of the Sacramento Association of REALTORS®, had her staff report back to the office in October 2022. However, she allows all her directors to approve work-from-home requests based on individual, temporary circumstances. "Everyone is appreciative that they have that option when needed," she says. "I think post-pandemic talent retention requires employers to be open to more schedule flexibility."

That consideration—talent retention—is never far from a CEO's mind. Even if leaders don't all agree just where on the work spectrum the virtual and hybrid options belong, they do agree remote working won't go away.

"The job market is so tight, especially here in the Bay Area, that a lot of employers can be 100% virtual, and I think I



BAY EAST ASSOCIATION OF REALTORS®

At Bay East Association of REALTORS®, a flexible remote work policy has built trust and creativity at work.

would lose some highly qualified, very valuable people if I said, ‘Nope, you have to come back,’” Thomas says.

Lara concurs, adding that she also considers the virtual option a great way to expand the talent pool. If, say, she wants to hire someone for marketing, she’s not confined to employees in the Berkeley area. “I can bring in the best of the best no matter where they live,” she says. “And that’s beautiful.”

Mapping a New Path

Though it has been uncharted territory from the moment she sent her people to work from home, Thomas says she’s found the lack of a map to be liberating.

“It meant that you could be creative, and it meant that you could make mistakes,” she says. “Because there was no playbook, there was a sense of ‘Go ahead and experiment—see what’s going to work and make some mistakes. You’ve got to stumble a bit before you can run.’”

The upside to that, she says, was a huge bump in trust from her staff as well as her board of directors.

Building trust with staff is one thing, but AEs also have to consider the impact of remote work on their ability to identify and build relationships with volunteer leaders. “Before, I was able to go to meetings in the committees, meet with members, see who future leaders are and observe their engagement,” Lara says. “You don’t have that in a virtual world.”

Now, without that personal touch, she’s relying heavily on current leaders for recruitment, in addition to reaching out to her “boots on the ground”: staff who have more direct contact with members, such as those in member engagement or government affairs. Now, staff members feel more engaged in the process of identifying potential future leaders.

Then there’s the issue of creating policies that define the boundaries of virtual and hybrid work. For example, “If you’re scheduled to be on a Zoom meeting, you need to be at your desk, not in the supermarket or on an airplane,” Lara says.

According to Linda Russell, director of employee relations and talent development strategies for the National Association of REALTORS®, it’s also important to consider the legal implications of remote work, especially when employees live in other states or countries.

While tax implications might be the first things that come to mind, labor laws and pay considerations can raise additional questions. If, for example, an employee works from home, does the association owe that employee a desk? In states that are very employee-friendly, the laws might say yes.

What if an employee working in Chicago chooses to move to rural Kentucky, where the cost of living is lower? Will the employee’s compensation be the same? Conversely, what if the employee voluntarily moves somewhere with a higher cost of living?

And what happens to the benefits package if an employee lives somewhere that doesn’t have easy access to those benefits?



BONITA SPRINGS-ESTERO ASSOCIATION OF REALTORS®

At Bonita Springs-Estero Association of REALTORS®, CEO Meighan Harris, RCE, left, brought her team back into the office to boost service to members.

Things get even more complicated when an employee moves out of the country; visa requirements and data security issues may come into play.

Wherever employees reside, Russell says, the onus is on the association to know what laws and regulations apply. “A lot of it goes back to having strong policies and procedures and processes in place,” she says. “You want to be transparent about what the employee’s responsibilities are and what your responsibilities are.”

Although not every association has the personnel—or can afford the personnel—to take on these additional human resources responsibilities, Russell says, AEs have a range of options to help them negotiate these new complex-



SACRAMENTO ASSOCIATION OF REALTORS®

Although staff at Sacramento Association of REALTORS® are in the office, CEO Jessica Coates, RCE, says work from home is also part of their talent retention strategy.



Linda Russell, NAR's director of employee relations and talent development strategies, says there are many resources available to help AEs navigate the ongoing changes in the world of work.

ities, from engaging with outside vendors to investigating the educational resources offered through the American Society of Association Executives or NAR's Center for REALTOR® Development. There's also NAR's HR Solutions team, which offers free resources and paid consulting services.

Reaching out to other AEs can be a good place to start. "We're all learning by doing," she says.

And a big topic of conversation among AEs has been how to offer remote work options without veering from your organization's "true north"—and supporting productivity through employee engagement.

The Bay East Association has added two wellness days as well as eight hours of volunteer time each year and has given everyone a health-and-wellness allowance. Employees can use the money for anything that helps them find balance—hiking shoes for hikers, lift tickets for skiers, movie tickets for families who want some extra time together.

Thomas has made extended office lunches a recurring event, aided by improvements to the Bay East association's building, which now features an event center with a large patio and accordion-style windows that can open to the outside. The change makes the entire space feel natural and inviting, she says.

At the Bridge Association, Lara keeps employees engaged through ongoing virtual events, including *Family Feud*-style games, contests with prizes like Starbucks gift cards, and more adventurous undertakings, such as paint-and-sip events, where employees are sent paint kits and an instructor guides them through a painting project.

To ensure that staff feel supported without the social outlets that come naturally in an office setting, Lara has

also instituted a "buddy system." Employees are paired for a month of regularly scheduled check-ins. "You're with a different buddy every month, whether you're on the MLS side or the association side," Lara says. "We're all one big Bridge family."

Rethinking Leadership

Going virtual, Lara says, has forced her to rethink the way she leads.

"One of the things I always did was walk into the office every morning and check on my team," she says. "Now, I check in on Slack. I just click on them and say 'Hey—I appreciate you. Are you doing OK?'"

She respects her staff's time by making sure virtual meetings have an agenda and a stated purpose, and she's increasingly expanded the scope of her staff's involvement to include projects such as developing the culture statement and working on the strategic plan—tasks that had previously belonged to the leadership team.

Thomas, too, says the pandemic changed the way she manages. "I went from being a perfectionist to being a realist," she says. "I'm more open minded, and one of the biggest benefits that came out of that is trust."

Regardless of whether your employers are in the office or working from home, trust may be the mantra for the age of remote work.

Harris uses productivity software to track employee work habits, allowing her to confront issues before they become problems. Others, like Lara, use shareable task tracking tools to help teams stay focused on objectives and to help individuals progress toward a goal. All recognize that regular contact is vital to building and maintaining trust.

Thomas doesn't use monitoring technology, but she does use email and Microsoft Teams to interact and has been pleasantly surprised by her employees' willingness to be connected, even after hours.

She says it's not an expectation, but a "lovely surprise."

"What it's done for me and done for them as a team is build trust—that if anybody needs anybody at any time, they'll likely get hold of them and get a response," she says.

Whatever challenges you face with remote work, one thing seems to be clear: Flexibility in the workplace is here to stay.

"I believe this will be something we continue to do," Lara says. "I believe it just puts us in a position of strength and viability."

And despite bringing her employees back, Harris agrees. "It definitely gives comfort to know that we can serve our members from wherever we are," she says. "It's wonderful to know that at any point in time, I can bounce from one way of doing business to another." ●

Eric Johnson is a writer living in Wisconsin.



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WHEN YOU'RE A STAFF OF ONE

These nine AEs from across the country share the good, the bad and the ugly on being the sole staff member at their associations.

BY DANIELLE WONG MOORES

According to the latest National Association of REALTORS® data, more than 50% of association executives say they're flying solo. For a staff of one, these AEs say, it's a constant state of triage and the support of leadership and committees—when they're willing and available—is critical. So, what does it really take to manage an association as a staff of one? These AEs tell it like it is.

What's the hardest thing about being a staff of one?

Bowden: The hardest thing is constantly feeling like I am playing an unwinnable game of catch-up and the inability to ever go away on vacation and completely disconnect.

Brakken: For me, it's knowing that I'm responsible for everything! And not having someone to bounce ideas off of. I don't laugh as much as I did when I worked with others.

Collins: I learned a year or so into the gig [that] board of directors leaders and committee chairs are not your friends. I don't mean that literally, but I do not talk to them as I would to a friend about association events, committees and so on. Talking to a member as you would to a friend is a sure way to get yourself in a lack-of-trust situation at some point. I keep *many* secrets, and my dog has heard them all!

Holloway: Learning to prioritize what needs to be done first when you have several things that are all high priority was very difficult for me in the beginning and sometimes still is. When I'm feeling very overwhelmed, sometimes I step away and take a walk or talk with one of my experienced board members. That helps to recenter my priorities.

Malooley: The hardest thing is trying to make everyone happy without making someone mad. I also understand the struggle to take a day off. I've set my office hours to Monday to Thursday, 8 to 4, so I get a day off.

Ray: I can honestly say there isn't anything hard about being a staff of one. I've

managed people in the past, and it's not something I enjoy.

What's the best thing about being a staff of one?

Holloway: Working with the members—hands down. I love that in a small association it is possible to know most of my members, and that they know my name and feel comfortable calling or texting for help. Whether I am working in the office or representing our association at meetings, that personal connection helps me remember who I am there for.

Bowden: I can listen to whatever music I want. And it's also nice to really see the impact that I make.

Brakken: Knowing that I'm "it" gives me a great sense of pride and confidence. It's gratifying to have the trust of so many people.

Collins: The best thing is not hearing excuses about why someone can't get to work on time or that day. Also, I never have to worry about a miscommunication between members and staff that didn't get communicated up the chain to me.

Stewart: My favorite thing is no office drama or jealousy!

Ray: I love that I'm responsible for my own schedule and time management.

Rose: The best thing about being a staff of one is the bond you create with members. We support one another and are there to help one another out. Even though our association is small, we are active in the community and strive to give back and put the focus back on the community as a whole.

The AEs



Emily Bowden, AHWD, C2EX
Executive Officer
Sussex County
Association of
REALTORS®
Sparta, N.J.



Suzi Brakken
Association Executive
Plumas Association of
REALTORS®
Quincy, Calif.



Debbie Collins
Association Executive
South Central
Arkansas REALTORS®
Benton, Ark.



Cristy Holloway
Association Executive
Ozark Trail Board of
REALTORS®
Mountain Grove, Mo.



Carla Rose, RCE
CEO
Salisbury/Rowan
REALTORS®
Salisbury, N.C.



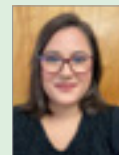
Tracey Malooley, RCE
Association Executive
Terre Haute Area
Association of
REALTORS®
Terre Haute, Ind.



Nancy M. Ray, C2EX, AHWD
Association
Executive/CEO
Capital Region Board
of REALTORS®
Concord, N.H.



Tammy Stewart, RCE
Association Executive
St. Clair Association
of REALTORS®
Pell City, Ala.



Sylvia Taylor
Association Executive
Tehama County
Association of
REALTORS®
Red Bluff, Calif.

How do you get members actively involved in service?

Holloway: Member involvement is a big challenge for a small board, especially one like ours, where we are spread out over a large geographical area. I have set a goal to visit each of our member offices personally at least once this year and twice a year in the future. Seeing their faces, shaking their hands and talking to members on a personal level is key. Otherwise “the board” or “the AE” is just someone an hour and a half away and disconnected from their day-to-day operations.

Bowden: We have an unwritten policy for all members of committees and the board to [prepare to] replace themselves. Whatever position you are in, you should be looking for someone who would be great for the role and then mentor them. This not only helps those moving up into a position but reminds those currently holding a position that they shouldn't expect to stay there forever.

Brakken: My trick is to tell them they've been “nominated.” From there it's simply explaining how fun or easy it is, how they'd fit in, and how it would benefit both them and the association. I try to spot potential service candidates and urge current leadership to do the same.

Malooley: I email surveys and hand them out at every event, asking members to participate and let us know about their talent and expertise. In October, the incoming board plans out their year and forms committees.

How do you set expectations, and how are roles and responsibilities determined with new leadership each year?

Ray: I do not get elected volunteer leadership involved in day-to-day administration. Frankly, leadership doesn't need or want to know the minutiae of day-to-day operations—that's the AE's job.

Collins: I like to quote Bob Harris, CAE [a nationally recognized speaker and educator on association management]: “Boards govern, staff (even a staff of one) manages.” I have this on a plaque in my office. Every year at the final board of directors meeting, we bring on the newly elected BOD members and go over expectations and goals and any “hot topics” or ongoing issues prior to their first BOD meeting.

Malooley: In November of the year, we have our local board attorney and accountant come in and speak. We also have our past presidents go over things to expect. I have an objective third-party trainer from Dynamic Directions provide leadership and committee training; I feel strongly it's much more effective than doing it yourself. Our leadership and committee chairs are required to be at the training live; there is less distraction, and they enjoy being together. To keep the cost down, the trainer joins us virtually.

Brakken: The president proofreads the monthly e-newsletter. If I need feedback on something, I text or call the president if it's urgent, or I email if it can wait.

Stewart: Partnering with other surrounding associations to provide quality training to leadership each year is key for a successful year. Bob Harris has provided leadership instruction twice in the last few cycles. After the instruction, I use Bob's worksheets and conversation as reminders and reviews.

Taylor: One of the things I take responsibility for is all membership engagement, such as newsletters and event flyers. Because our president changes every year, this ensures our members have one consistent person educating them on association matters.

How do you keep up with Core Standards?

Bowden: At our committee orientation in January, I hand out the applicable section of the Core Standards to the committees. This way they understand our charge for the year and what they need to work toward. It gives the committees a deeper understanding of what their true mission is and how it applies to our charter.

Brakken: Core Standards is pretty routine now. Most of it is already built into our calendar of events. I start early and try to finish it off by September. I knock out the easy stuff first and keep a running list of what's still needed. I've learned to keep it simple and not include more than what's needed to show compliance.

Collins: After each event or something pertaining to Core Standards, I import photos into a specific folder on my computer. I carve out time each quarter to drop it into the correct spot on the Core Standards platform.

Holloway: I keep a running spreadsheet. As the end of the year approaches, we discuss the standards during our board of

directors' meetings to make sure we are all on the same page. I'm fortunate to have a great state team that checks in regularly and offers ideas and assistance.

Ray: As soon as the current year's Core Standards are available, I check for any additions or changes to make sure our annual strategic plan includes those changes, if necessary.

Rose: I created a Core Standards checklist that is updated each year and shared in the RARE database and on the AEI Year-Round Facebook page. This has been a helpful tool for myself and others in keeping up throughout the year. For those who reach out with questions, my first statement [as the page administrator] is that if I don't know the answer, we will learn together.

How do you stay organized?

Bowden: I asked my committee chairs and co-chairs to pick a standard meeting day, so nothing would be planned on a whim or fall by the wayside.

I usually plan out a full month of social media posts at the beginning of the month. My newsletters go out on the first and 15th of every month. I keep a lot of lists, so I don't get overwhelmed or forget anything. Last year, I purchased a reusable notebook by Rocketbook. When I've completed everything on the page, I can just erase it. If I need to keep the notes, I scan the QR code and upload them to the cloud for later. I have a whiteboard for all of my big project items; it's always full!

Brakken: I am just a severely organized person. I still use a desk calendar and a paper list of things to do!

Holloway: It is important for me to keep my email inbox as organized as possible because much of our business is done electronically. Otherwise, things can easily be missed or slip through the cracks.

Malooley: I have a folder on my desk for every function with information on the previous year's event. I also have a giant wall calendar with the next year's events filled in.

Ray: I get an old-school “At-a-Glance” organizer several months before the new year and set up annual events, travel and deadlines for the upcoming year, using my current organizer as a template.

I do my best to be proactive and not procrastinate. If possible, I get things done ahead of time. If I wait until the last minute

to complete a task, something unexpected will inevitably come up, and I'll get stressed out. It's important to be realistic, expect the unexpected and stay flexible.

Rose: I rely on Excel spreadsheets for membership information, and I keep all of my documents in a small spiral-bound notebook with 12 pockets. It has worked perfectly for the past few years and keeps everything in one spot.

Taylor: "Reset Friday" is my time to put things in the correct folders and clear off my desk so, come Monday, I can have a fresh start to my week.

How do you prevent personal burnout?

Rose: My husband and I drag-race on weekends, and it's a nice distraction from the workweek. I also love photography. I've learned to juggle quite a bit at once, including serving on other boards, and, for now, have managed to keep it all going.

Bowden: Understand that you are one person. If you stayed at the office until all the work was done, you'd never leave. Make sure that you stick to your scheduled office hours—mostly, because who are we kidding? Unless it's an emergency, the work will still be there tomorrow.

Brakken: I exercise regularly and try to keep "normal" office hours. I try not to dwell on the negative stuff.

Holloway: I have to be very deliberate in turning off the phone and laptop for time spent reading or in the sun or on the water. We all need downtime to give our brain and body a break.

Ray: I have learned to say no. As an AE, I like to keep my members happy and well served, but there are times when I have to say no. I regard myself as a resource for resources and don't get involved in things that are not in my wheelhouse.

How do you use your network to help you do what you need to do?

Ray: Personal contact, even if it takes a bit more time, is so worth it. I make personal phone calls, make a point to personally greet members at continuing education classes and membership meetings, and maintain a close relationship with real estate firm admins for their assistance with dues



collection, member involvement, triennial Code of Ethics training and more.

Last year, our North Carolina AE Committee chair also created a spreadsheet (AE Awesome Experienced Contacts) that we can reference. AEs add their name to specific categories indicating where they have experience and are willing to serve as a resource for others.

Bowden: The AEI Year-Round Facebook group, along with the RARE database, is an invaluable resource. I use it all the time to ask questions and poll the group. No need to start from scratch or reinvent the wheel!

Also, the knowledge I've gained from the NAR Leadership Summit or AE Institute is worth the time away from the office. Networking and collaborating with colleagues has given me new perspectives and new ways of doing things.

Brakken: I connect nearly daily via email with our contracted bookkeeper and our volunteer MLS Committee chair. I couldn't do this job without them. I try to update the president on what I'm doing via email every week. The elected leaders are quite busy, so between meetings we usually only text as needed.

Rose: As chair of the AE Committee for NC REALTORS®, I am working this year within our objectives to show that "AEs R Valued." We did T-shirts for all our North Carolina AEs to show support for one another and build a stronger bond. As AEs, we network throughout the year via Zoom networking hours, and our vice chair started a

book club to continue the growth and development of our group.

What's the best advice you can give to your fellow AEs in this same situation?

Bowden: Breathe. Use the resources you have available. Remember, your fiduciary responsibility is to your association. You've got this.

Brakken: Be organized, and don't take things personally (or too seriously). Show members what a great asset you are to them.

Rose: My best advice is don't be afraid to reach out and ask the "dumb" questions. There truly aren't any.

Stewart: Take courses and training offered by NAR and, when you meet the requirements, obtain the RCE certification.

Taylor: Have a five-year plan so you can always make sure you are moving forward and investing in your professional career.

Malooley: Keep pushing forward. Sometimes this role is very hard and you question if it's worth it, but at the end of the event or the year, you can look back and say, "I did it!"

Collins: Another slogan on my desk is from the Ronald Reagan Library: "There is no limit to what a man can do or where he can go if he doesn't mind who gets the credit." Don't get drawn into the whole "who gets the credit" debate. Take the high road and enjoy the ride! ●

Danielle Wong Moores is the senior editor for AExperience.

*Getting Your
Organization* **Into**
Alignment



ent

When your structure and processes make sense and your staff are well suited for their jobs, you have a smoother ride to success.

BY CAROLE KAPTUR

Remember the old refrain we used to sing as kids, “The wheels on the bus go round and round, round and round?” Well, as grown-ups, we know the wheels only go round if they’re the right wheels. Consider this: Have you ever had to use a doughnut spare tire? It isn’t designed to last or exceed certain speeds. If you think of the wheels as the employees of your association, you can see how important it is to ensure you have the right people in place. That’s an essential task for a chief staff person—and one that typically requires bringing in an outside consultant.

Workforce Planning: A Case Study

Let’s pretend there’s an association executive named Andrea Evelyn Smith, who goes by “AE.” She loves her job and often feels she was born to be an AE; even her name seems to support it.

She recently took a position at a midsize association. It’s a career move for her and presents her with new and interesting challenges. AE is facing difficult budget issues due to an anticipated drop in membership. Her staff has been highly resistant to the changes she wants to implement, and this situation is made more complex because these are priorities the board emphasized during her job interview. The board is concerned the staff might not be able to adapt. But with all the fires she’s been putting out, AE hasn’t had enough time to think about the staff members’ wishes. Still, she knows the industry is going through significant changes, and she needs staffers who can handle these curve balls. But the staff members complain constantly that they are overloaded.

Taking a rare moment to reflect, AE sees that some of these fires could have been prevented. She recognizes she needs to follow through on the goals the board members have given her but suspects they may be right about their personnel concerns.

AE realizes she doesn’t have the knowledge to solve this problem—and she needs support in her decision-making. So, she reaches out to a human resources consultant to discuss the situation.

To Audit or Not to Audit

AE tells the consultant she has many concerns: the future direction and capabilities of the association, staff skills and competencies, member engagement, impending budget cuts and a new member database implementation. Staff are at the core of these concerns. The HR consultant discusses two options—an HR audit or workforce planning.

Workforce planning always includes conversations with employees, which often yield data that otherwise may only be shared at the proverbial watercooler.

The first option, an HR audit, includes interviews with staff members to understand whether the work they perform is consistent with their job description, followed by a review of the job descriptions against the needs of the association. It also includes a review of employee files for compliance and a review of the application/interview process. The audit will uncover whether jobs are appropriately classified as exempt or non-exempt and whether overtime has occurred and been paid.

The second option, workforce planning, is more involved. It takes a deeper dive and can be done with or without a compensation analysis. The consultant recommends this option as the best approach to help AE accomplish her goals.

Along with staff interviews and a review of employee files and job descriptions, workforce planning includes an examination of the strategic plan. It's often used when there's a desire to better understand an association's culture and when there's uncertainty around existing and potential jobs. It can help a CEO understand whether there are gaps or opportunities for streamlining and define how realignment could add value for the members.

Getting the Dirt

Employees often have the most information on gaps and superfluous resources. That's why workforce planning always includes conversations with employees, which often yield data that otherwise may only be shared at the proverbial watercooler. They may also yield negative information regarding how employees feel about one another and about the AE as a leader or communicator. However, that's a good thing: You can't fix something you don't know about.

These informational interviews are paired with an evaluation of job descriptions, which are often out of date and in need of revision. This analysis can help determine whether the level of the position is appropriate. In addition, studying employees' résumés and job applications can help determine skill gaps, and performance reviews can offer insight into what feedback employees have received. Working with the HR consultant, the CEO can determine the accuracy of past feedback.

A workforce plan also looks at whether your processes are documented. Think succession planning and organizational knowledge transfer: A review of processes might suggest opportunities for streamlining. For example, are staffers using several calendars? If so, why? Is your current software serving the association well, or do you have outdated programs without the capability to produce reports, causing many hours of manual labor to produce information that could be automated?

Problems Revealed

Returning to our pretend situation, AE and the consultant agree to proceed with workforce planning. The consultant arrives and begins to talk with staff members. They are all told their conversations are confidential and the report will contain only aggregate information. During the discussions, the consultant confirms staffers are highly change resistant. Most of the staff members have been with the association for more than 10 years, and they have been doing things the same way the whole time.


In the interview with the membership director, the consultant learns that her duties are very administrative in contrast to the expectations from the title. The membership director enters data and responds to routine member calls and has no management or decision-making responsibilities that impact the association. The consultant is barraged with a long list of complaints about other staff members who "don't do their jobs."

The membership director also reveals she believes she should have gotten AE's job. She interviewed for the position but was not selected by the search committee. Other staff members tell the consultant the membership director seems to lead the charge of resistance. The consultant also learns the membership director has been known to raise her voice, not only with staffers but also with members, a situation never addressed by the previous executive. Staff members inform the consultant that the membership director is so busy being concerned about what everyone else is doing that she rushes to complete her work and makes many errors that cause her significant time investment for correction.

The membership director isn't AE's only problem. The consultant sees that there's no central calendar and that all the staffers have director titles, even though their duties are mostly administrative in nature. Employee files also contain no résumés or applications, leaving the consultant to wonder how the staff members were hired. AE tells her that, to the best of her knowledge, the staffers are friends of the previous association executive or members.

The consultant reviews the strategic plan and sees that one of the goals is to increase member engagement. In reviewing the organization chart, the consultant sees the existing positions include roles in membership, reception, and MLS and accounting (part-time).

The existing organizational structure has the receptionist reporting to the membership director. The

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consultant believes this is unnecessary, as there are only four staff members. Additionally, to increase attendance at events, AE needs support from marketing and event planning. While the membership director seems to believe those areas are her responsibility, she does not have the necessary skills.

As luck would have it, the receptionist has a bachelor's degree in marketing and has organized events in the past. The consultant notes that realignment of responsibilities away from the membership director to a new marketing and events position will better position the association to achieve its strategic objectives.

AE and the consultant also discuss using one association calendar so that staff members can understand all deadlines and association happenings. AE commits to having at least biweekly staff meetings to review business so that everyone has a better understanding of what is happening, leading to increased staff engagement.

Finally, the consultant talks with AE about staff behaviors. They discuss a strategy for having one-on-one discussions, so each staff member understands the association's vision, reengages with the mission and knows how to move forward.

They also discuss staff skills as a whole. The receptionist has the knowledge, skills and ability for a marketing role. Unfortunately, some of the other staff members do not have all the knowledge, skills and abilities needed. But because they have been in the roles a long time, it may be possible to train them through professional development. Although never a desired outcome, AE understands she might need to make some difficult decisions if staff members can't improve their performance.

Real Results

The game of pretend has now come to an end, and you might be wondering about the results achieved by some of the real associations that have undertaken a workforce planning analysis. The results of such an analysis are always confidential, but here are some successes I've witnessed:

- Organizational realignment that improved engagement, eliminated process redundancies and created opportunities for promotion.
- Streamlining through reduction of multiple software programs being used for the same purpose.
- Organizational culture change achieved by addressing key issues.
- Creation of a value proposition.
- Creation of new positions that support the National Association of REALTORS® Core Standards.
- Realignment that moved employees into new positions that better suited their skills while creating additional value for the members.

If all these outcomes sound good to you, it may be worthwhile to consider whether workforce planning could be beneficial for your association.

First, Make a Case

Considering bringing in a human resources consultant for a workforce planning engagement?

Every workforce planning analysis should begin with identifying a business case. What is happening that is causing you to want to undertake this project? Common business cases include budget shortfalls, skills gaps, realignment concerns and new strategic priorities for a new direction. Sometimes an association's board of directors wants an analysis conducted. That's OK, too, as long as there's a business case identified.

Know that workforce planning is about more than having the right people in the right job at the right time. In the ideal world, it identifies the roles that are most valuable to the organization.

But there are some things workforce planning can't address, such as resistance to change. Nor can workforce planning address self-serving interests, including roles someone may want to create but that are completely unnecessary for the association's size and membership needs.

Completing a workforce plan isn't always fun—especially if you're operating in a lean environment in which every seat is vital—but it's an essential practice that you can return to time and again when you need to fine-tune your organization.

Regardless of the recommendations, it's important that the AE and the board not take the results personally. You can't know everything, nor can you be an expert in everything—even if you often feel that you should.

Sometimes AEs believe they've done many things right and fostered a good culture, and hearing unanticipated information can be disheartening. The important thing to recognize is that there will always be negative feedback.

There's a balance to consider. If the feedback is fairly trivial or insignificant, then don't give it that much weight. Take stock of it and move on. In other words, look at the positive recommendations and move forward with those.

Going back to my original analogy, if your current organizational model is going flat, you need to change it. But a spare—an easy fix—isn't going to last long. It's important to take the time to assess and invest in a team that runs together smoothly and can successfully drive your association forward. ●



Carole Kaptur, SHRM-SCP, RCE, is director of human resources outreach for the National Association of REALTORS®, overseeing NAR HR Solutions (formerly Strategic Association Management).



SENTRILOCK

Two Decades of Innovation

Sentrilock offers a robust technology solution—far more than just a piece of hardware used for storing a key.



Twenty years ago, the National Association of REALTORS® helped give birth to a lockbox company that today holds a roughly 40% share of the residential lockbox market. A *Experience* magazine talked with Scott Fisher, Sentrilock's CEO (pictured left), and Bob Goldberg, CEO of NAR and chairman of the board for Sentrilock (pictured right), about the genesis of the company, its value, and what drives innovation today.

Where did the idea for Sentrilock come from?

Fisher: My business partners and I had been in the real estate technology space for about 10 years. One of our customers wanted a lockbox alternative and came to us. That led us down the path of developing a competitive solution. We got through all the engineering work but realized that, to get traction, we needed a partner. I read an article about [lack of competition in the lockbox market], so I knew NAR was aware of the concern and I reached out to Bob. *[At the time, Goldberg was senior vice president of marketing and business development for NAR.]*

Goldberg: Scott said to me, “We think we’ve got a great product, and we’d love to talk to you about it.” So, I start to explain to Scott how our affinity program works, and I remember this pause. We didn’t have Zoom, so I couldn’t read Scott’s facial expression. But it was sort of like, “Bob, to go forward with this, we need investors.” *[After board of directors approval, NAR became a 59% owner, later purchasing Sentrilock outright.]*

What sets the product apart?

Fisher: For one thing, we’ve integrated an entire showing service platform into our app. Also, we know safety is a concern for real estate professionals, so we pioneered an alert system that agents can easily use during a showing. And we’ve made the transition for associations who choose Sentrilock almost effortless.

Goldberg: The company can innovate quickly because it’s independently run. It has a five-person, *volunteer* board of directors made up of people in the business.

Fisher: We’re proud to have a 45-second average response time in our call center, because we know when members call, they’re probably with a client, and they don’t need to be sitting on hold.



Scott Fisher, Sentrilock CEO, and Bob Goldberg, NAR CEO

NAR/MONIKA ALBERSKA

Goldberg: By the way, that call center is U.S.-based. If there’s a customer service issue or a question, our support people are right there in Scott’s office in West Chester, Ohio.

Fisher: Product assembly is also done in the United States, and by the end of this year, 85% of the content of the lockbox will be domestically sourced.

What’s a feature AEs may not know?

Fisher: In some markets, they’re putting two lockboxes on the property—an electronic lockbox for agent access and a mechanical box for all the other access, such as repair or inspection. With our one-day Flex Codes, agents can provide temporary access with electronic credentialing, which makes it a much more secure experience, and the agent gets the data from all those visits. There’s also Access by Appointment, which restricts access to the time of the appointment, so homeowners don’t have to worry about somebody showing up at the wrong time or staying too long.

How’s the data used?

Fisher: It’s a leading indicator of home buying and selling activity. It’s also a great retention tool for agents. We track how long prospective buyers are in the house, which is helpful in completing the full picture of what’s happening with that property. Overall market stats give agents a picture of where consumer interest is going. We’re a key piece of information that is not available through any other channel.

Goldberg: The data is also an opportunity for AEs because they can give the local newspaper leading indicators for the marketplace and position the association as an authoritative source.

What’s the future of lockboxes?

Fisher: With electronic locks becoming more prevalent, some people believe it’s the end of the line for lockboxes. I’d challenge that assumption. These consumer products might be great, but none of them are connected to each other, and the agent is not getting the data. I don’t foresee that this business is going anywhere. The use case will change, and we will adapt. ●



Managing Member Data

Sentrilock isn’t the only association-focused tech solution NAR has supported. The year 2024 marks 15 years of operation for RAMCO, the association management solution started specifically by and for REALTOR® associations. Find out why, today, it’s used by more than half of all state REALTOR® associations and roughly 140 local associations.

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A Primer on Secondary Memberships

Let's clear up any confusion on this membership type.

BY CHRIS DEROSA, RCE, CAE



I sometimes get questions on secondary member status from Points of Entry staff (POEs) who are confused on the policies, procedures, data fields and more.

The terms “primary” and “secondary,” as they relate to membership status, exist for purposes of dues calculations. Simply put, the primary association is the one through which members (REALTORS® and REALTOR® associates) pay their national dues. Members pay National Association of REALTORS® dues only once, and it's through their primary association.

When licensees join as a member, their choice of primary association depends on the association(s) their Designated REALTOR® belongs to. If the DR is a member of “Happy Board” and “Smile Board” (it doesn't matter which is the DR's primary and which is secondary for this purpose), licensees affiliated with the DR can choose either board as their primary. When a DR belongs to only one board, all licensees affiliated with that DR must make that their primary board.

Once they join, they can then join *any* state or local association(s) as secondary, whether or not their DR is a member. If they wish to join “Cloudy Board” as a secondary member and their DR is not a member of Cloudy Board, it does not matter. They can join Cloudy Board.

However, licensees cannot have a secondary REALTOR® or REALTOR-ASSOCIATE® membership unless they are a REALTOR® or REALTOR-ASSOCIATE® member at their primary association. For example, someone who holds local affiliate membership at a primary association can't join a secondary association as a REALTOR®. NAR does not read secondary records, as these members do not pay national dues at the secondary association. NAR also does not count members twice; if they are a REALTOR® or REALTOR-ASSOCIATE®, that must be the “member type” in their primary record.

At the local level, your member is your member. So, REALTOR® members of your board, whether primary or secondary, are treated the same. They pay the same local dues, enjoy the same board voting privileges, and

have the same rights, privileges, duties and obligations. In other words, “secondary member” does not mean “second class.”

However, no one can hold secondary membership unless they are marked “active” at their primary association. So, if the member's primary association drops them, REALTORS® M1 automatically changes any active secondary records to inactive. POEs are notified via Daily Changes and can certainly reach out to these members.

Institute Affiliate members cannot have any secondary memberships.

What are the rules when members want to join my association as secondary but their primary association is in another state? Normally, that REALTOR® or REALTOR® associate can choose to join just a local, just a state or both as a secondary member.

There is one exception to this rule, and it applies if the member is affiliated with a real estate brokerage in your state that is separate and apart from the real estate brokerage in the state where primary membership is established. In these narrow situations, the member *must* join both your local and state as secondary.

How else can we use secondary records?

Secondary records in M1 can be used to track more than just secondary association membership, and some new fields have been added to the record.

- You can add a secondary record to note when a primary member of your association has **more than one license**. For example, a member might hold both a real estate and appraiser license—or both a broker and an agent license.
- A secondary record can be used to denote an



Remember that the rule is “one person, one member ID, one member record.”

additional **subclass** (subcategories customized by the state or local association) or **member type** (categories spelled out in the NAR constitution).

- The **Arbitration/Ethics Pending** field can be used in the secondary record to indicate if there is an ethics issue pending.
- The **Local Join Date** field in a secondary record indicates the date members joined your association as a secondary member. If you use the NAR e-commerce invoicing module, the

“Pay Dues” function reads this record and the join date to determine the proration, if any, of their secondary dues.

We also have plans for a **Dues Waived** field so that if local POEs need to waive local dues for a secondary member (or if state POEs need to waive the secondary state dues), they will be able to do so in the invoicing module.

You can add as many secondary records for an individual member as you like, as long as the data is unique.

What else should we know?

It’s important to note that on the secondary level, POEs are “on their own.” Individual local and state POEs add and maintain their own secondary records.

- Remember to change the status to “inactive” anytime secondary members drop their membership in your board.

- Do not transfer members into your association as primary status without the member’s agreement.
- Remember that the rule is “one person, one member ID, one member record.” M1 is the database of record for all official processes, from NAR director entitlement and dues calculations to delegate vote certification, to reporting of PAC contributions to the Federal Election Commission, and on and on. M1 should always be the source of truth and should never have more than one member record for the same person.

Questions? Contact NAR’s policy group at NARPolicyQuestions@nar.realtor. ●



Chris DeRosa, RCE, CAE, is member information and e-commerce product leader for information technology at the National Association of REALTORS®.



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MIND OF THE MEMBER



Consider Your Staff

Staffing success is directly related to your approach to remote work and retention. **BY BOB TAYLOR, RCE**



There is no one-size-fits-all approach on how best to function with association staff. What I can do, however, is share 50 years of experience successfully working with people in an entrepreneurial environment.

The Business of Staffing

How you go about hiring people impacts everything. If, when adding to the management team, you do not consider the seat they will occupy, the odds are only 25% that you have made a good hire.

	Wrong Seat	Right Seat
Right Person	+ -	++
Wrong Person	--	- +

So, before adding to your existing management team, you need to evaluate those who are part of it. These three fundamental questions should always be top of mind:

1. How do staffers feel about your organization's core value? This guiding principle should be able to be stated in a half-dozen words, such as "Delivering the best member experience."
2. Is organizational growth and ongoing relevance something in which they want to participate?

3. Do they have with the tools and skills required to do the job?

When you grow or find yourself needing to replace a member of your management team, another important key is to involve all those impacted by the new hire. This does not necessarily give them final say-so about a hiring decision, but when done properly, it makes acclimation easier.

Remote Work Realities

The success of remote work will depend on a variety of factors:

- If you have issues with remote work, consider whether you are imposing these issues on others looking to work remotely—and how that may be impacting their job satisfaction and success.
- You may find yourself dependent on someone else being in the office even though their working from home could be just as convenient, if not more so. This is an issue with which I struggle, so don't feel alone if you do as well.
- The technology already exists to make remote collaboration as effective as in-person collaboration.
- The cost of this technology is reasonably inexpensive and not difficult for anyone to learn to use, despite any lack of technological expertise. At our association, we have installed a phone system that conveniently and instantly connects us regardless of where we are. We use it all the time, even when we are all in the office.
- Also consider that if you appreciate your staff, you need to adapt. If you are unwilling to adapt, you may be signaling that you do not appreciate them.

It Comes Down to Retention

Consider this: Recall the last time you left a job. When you told your boss that you were leaving, pay may be the reason you gave. Yet underappreciation, lack of consideration,

inability to be heard, etc., were running through your head. People will often work where they feel valued even if they could get paid more somewhere else.

When you add the right people to your team, employee value becomes the foundation of retention because it requires you to seriously consider the value an employee brings to your team culture. It also requires you not to take advantage of their desire to be associated with your organization.

Salary should be the primary evidence for appreciation, but compensation is just one of several potential benefits. At my association, for example, management team members:

- Are offered an annual allowance to attend industry-related meetings.
- Take classes that further their understanding of their role within the organization or better help them understand the world within which our members operate.
- Have flexible work hours that take personal needs into consideration.
- Participate in leadership workshops for volunteers.
- Visit member offices and are the face of the association.
- Get an above-average number of paid holidays annually (the day after Thanksgiving, four additional paid days off at the end of the year, etc.).

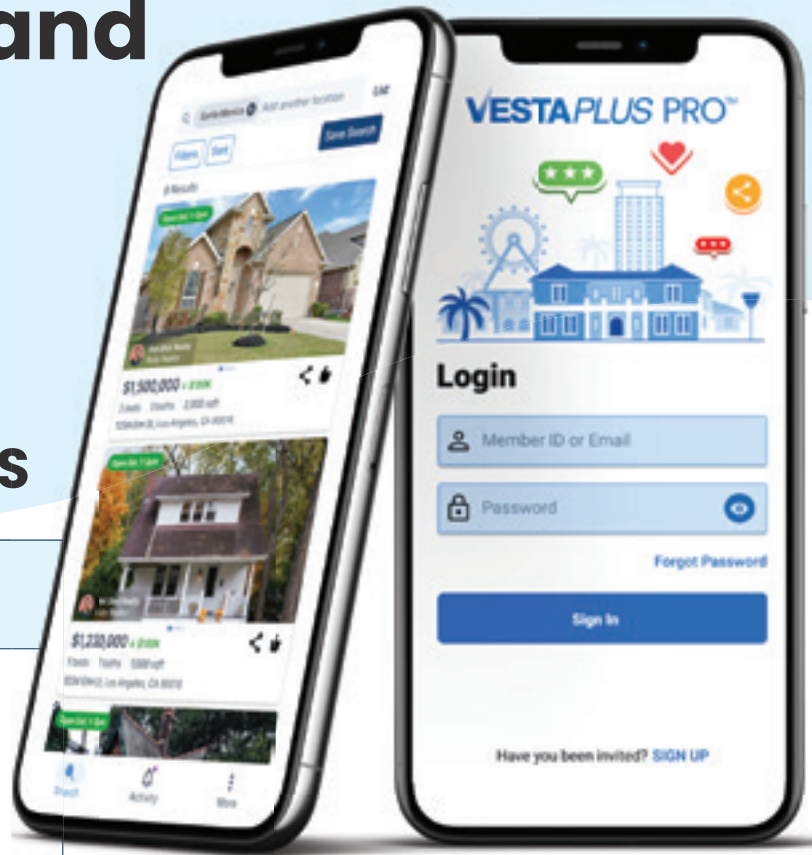
Also note that staffing, remote work and retention interact. This makes it likely that if you have little difficulty with retention, staffing and remote work are non-issues. Unfortunately, if you have difficulty with retention, then staffing and remote work policies may be the culprits. It is also likely that if retention and remote work are non-issues, you likely have the right people in the right seats.



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

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Team Player

South Shore REALTORS® CEO
Rachel Tristano shares her
staffing know-how.

When it comes to staffing, Rachel Tristano, RCE, CAE, believes in inclusivity, transparency, empathy and kindness as guiding principles. She adds, “Together, we share in our many successes, and equally, we learn from our rare failures, supporting one another throughout.” Here, Tristano offers more advice on how association executives can approach staffing.

Q: How do you and your staff stay in sync?

Communication and collaboration! Regular communication channels are critical so that everyone is up to date on organizational changes, projects and goals. We hold frequent team meetings, and I have an open-door policy. We also leverage various collaboration tools and project management software to enhance productivity.

Also beneficial is my HR Management Certification from the Society for Human Resource Management. Coming into a CEO position with longtime staff can be challenging, and I realized quickly that bringing about intense changes was essential for our growth and improvement. The certification gave me the knowledge and

tools to navigate through these changes successfully and significantly improved my staff management.

Q: What’s your philosophy on remote work?

My philosophy is to focus on results rather than the number of hours spent at the office. Setting clear, measurable goals and expectations is essential. Regular check-ins, whether video conferences or phone calls, help us maintain a strong connection, as do team-building activities.

Q: Can you share some examples?

We’ve implemented periodic virtual wellness sessions, such as guided meditations or fitness classes; walking meetings; and outings two to three times a year. We also participate in charity events together. These activities contribute to a more fulfilling work environment.

Q: What’s your biggest management challenge, and how do you overcome it?

Misunderstandings and unclear expectations can deter productivity and morale. I make a conscious effort to listen to my team members, providing them with a safe space to express their thoughts and concerns openly. Regular one-on-one meetings allow us to address individual needs.

Q: You’ve worked at both a national affiliate and a local association. What have you learned from these experiences?

Regardless of the organization’s size, certain principles remain universal: building a strong team culture, fostering open communication and promoting a sense of ownership among staff. I’ve learned the value of adaptability and the importance of customizing approaches to fit the specific dynamics of each organization. Highlighting teamwork, recognizing individual contributions and encouraging professional growth are practices that all AEs can benefit from. ●

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