

SPRING 2024

AEXPERIENCE

FOR ASSOCIATION EXECUTIVES.
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The Generational Issue

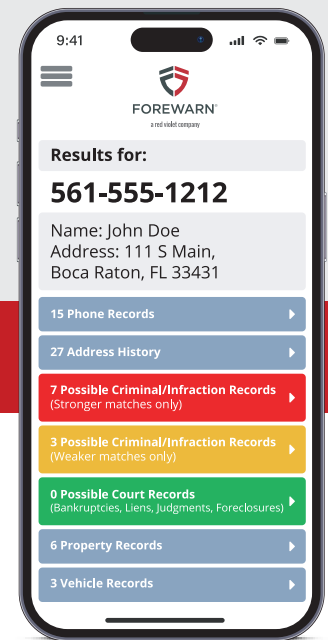
What can each generation teach us?
The answers might surprise you.

Plus: Talking points on the
proposed settlement agreement.





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

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ON THE WEB

Show Members What You've Got

The Value Proposition Toolkit is a new resource, developed with input from AEs, to help you establish a clear and impactful value proposition focused on what you're already delivering to members. Access it now at nar.realtor/ae/value-proposition-toolkit.





AEC CHAIR

Here to Support Each Other

By now, you are aware of the settlement agreement that NAR announced to resolve the claims brought on behalf of home sellers related to broker commissions. As association executives, we are here to serve our members and help our association and our industry move forward. Since this announcement, you have truly stepped up to do just that. You have been on the frontlines supporting our members, helping them understand what the settlement means for them and directing them to important NAR resources.

At a time when many of our members are facing challenging markets, and are looking to us for answers, it's essential to share with each other the most useful resources, programs, and ideas to help one another further understand and be able to communicate about the settlement. I, along with the Leadership Team, recognize that right now the constant noise and inaccurate reporting by the media is frustrating. I am sure you too feel that frustration.

A central source of information for the facts about the settlement is facts.realtor. The Leadership Team intends to continue regular updates to the site, providing AEs with the latest tools needed, such as FAQs, videos, an estimated timeline, and a fact sheet.

I also encourage you to continue sharing potential advocates who can speak on NAR's behalf. Together with NAR's communications team, advocates will help ensure our members are receiving the latest communication tools to address misinformation about our association and industry.

Non-members—such as clients and consumers—interested in learning more about the settlement can go to competition.realtor for the latest updates.



Theresa Hatton, RCE, is CEO of the Massachusetts Association of REALTORS® and 2024 AEC chair.

Additionally, you can visit ThatsWhoWeR.realtor to view the consumer campaign ads, and to leverage turnkey advertising and social assets. The campaign demonstrates the expertise of REALTORS® who help their clients navigate the risks, pitfalls and complexities of buying or selling a home or property, and it reinforces their expertise, commitment and consumer-first approach.

The Leadership Team is continuing to execute its plan to make sure you hear from them in the short and long term, engage with media and correct inaccuracies, and support state and local associations. I ask that you continue to speak out about the value REALTORS® bring to their consumers, keep open lines of communication with one another, and overall help NAR to share the facts about this settlement.

As always, thank you for all that you do—and please know that I am here for you. The entire Association Executives Committee is here for you as well. Don't forget to take advantage of AE Chat Live, which is hosted monthly, and feel free to reach out if you have any questions. We'll see you in Washington, D.C., May 4–9 for the REALTORS® Legislative Meetings.

AEXPERIENCE

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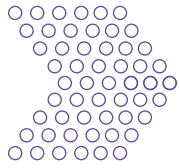
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REAL FACTS. RIGHT NOW.

Reliable, factual information regarding the **proposed settlement agreement** and what it means to you and the valuable role your members play in the transaction.

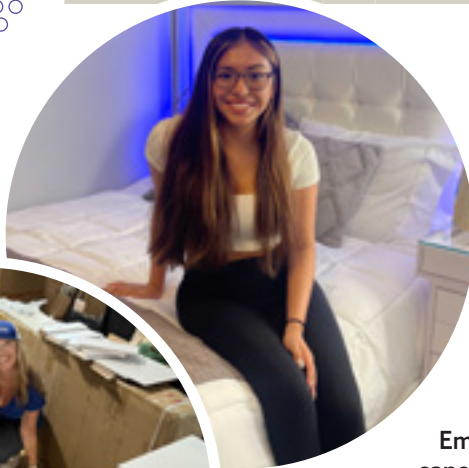
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AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS



CAPE FEAR REALTORS®

COMMUNITY CAREGIVERS

Making Dreams Come True

Like many REALTOR® association executives, Janis Netherland relishes working in an industry that makes people's dreams come true.

When she heard about Emily, a 19-year-old battling cancer whose greatest wish was to have a glamorous bedroom makeover, the director of philanthropy for Make-A-Wish Eastern North Carolina knew just who to call: Cape Fear REALTORS®.

Suzie Lude, director of education at CFR and a longtime Make-A-Wish volunteer, built a "glam team," including Government Affairs Director Kelsie Nagele and eight CFR members. In just one day, they worked for more than nine hours to make Emily's dream bedroom happen, complete with new paint, furniture, lighting and more, thanks to the help of a matching \$2,000 grant from the NC REALTORS® Housing Foundation.

"She is thrilled with her glitzy new bedroom," Netherland says, adding that the room offers a respite for Emily, who dreams of becoming a nurse.

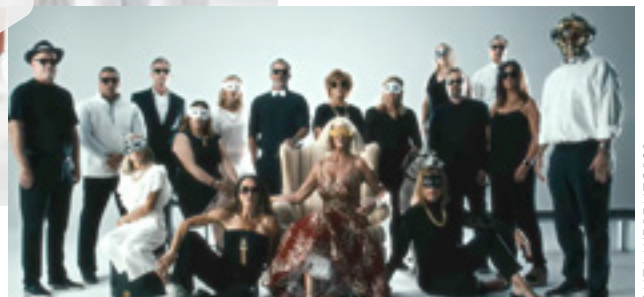
"Giving back to an organization like Make-A-Wish not only fosters a culture of camaraderie among our members but also positions agents who are REALTORS® to take ownership of caring for the community they live and work in," says Janet Kane, RCE, CAE, CFR CEO.

With 400 children and young adults waiting for a wish in eastern North Carolina, CFR staff say they look forward to a continued partnership with Make-A-Wish Eastern NC and the opportunity for staff and members to help grant many more wishes.

Adds Kane: "I cannot tell you how much Emily's story touches my heart personally. ... I lost my older sister to leukemia at the age of 17, and she would have loved a room makeover! Truly a wonderful gift!"

Sing It Again, Salt Lake

The creative minds at Salt Lake REALTORS® have done it again. Their 2023 end-of-the-year parody video, "Bad Contract"—playing off Lady Gaga's song "Bad Romance"—garnered more than 2,000 views in its first two days. To watch it, visit Salt Lake REALTORS®' channel on YouTube. Warning: You'll find yourself singing its catchy lyrics, "I found a hole in the rooftop last night. It wasn't disclosed. Man, that just isn't right, I'm out of luck."



SALT LAKE REALTORS®

LITIGATION

Laying Down the Facts

Since the National Association of REALTORS® announced the proposed settlement resolving nationwide claims brought by home sellers related to broker commissions, there has been no shortage of misinformation on what it could mean for NAR, the industry and real estate professionals. Many headlines are not separating fact from fiction, which is causing falsehoods about the agreement to reach you, your members and the public. The settlement agreement is complex and calls for practice changes that will affect members when these go into effect in late July 2024. The changes include:

1 Prohibiting offers of compensation on the MLS. Once the change goes into effect, offers of compensation can continue to be an option consumers can pursue off-MLS through negotiation and consultation with real estate professionals.

2 Requiring MLS participants working with buyers to enter into written agreements with their buyers. NAR has long been an advocate for the use of written agreements as they can help consumers understand exactly what services and value will be provided, and for how much.

The settlement, which as of press time on April 4 was pending court approval, provides a path forward for real estate professionals, REALTOR® associations, brokerages, MLSs and other industry stakeholders. Most importantly, it gives NAR members the chance to refocus on their core mission to support buyers and sellers.


To receive needed support during this time of transition, you and you members can access valuable resources available through facts.realtor:

- Fact sheets
- Legal documentation of the settlement
- Settlement timeline
- Answers to FAQs

- News articles
- Podcasts
- Videos
- Social media assets

In addition, you may utilize NAR's Executive Outreach Program, which is designed to support your association by connecting you with NAR staff experts, who can attend one of your membership or staff meetings to help talk through the settlement agreement and answer questions your association may have.

 nar.realtor/the-facts

 nar.realtor/executive-outreach-program

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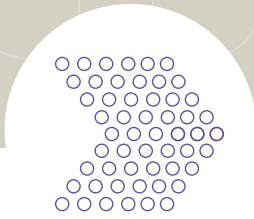
HOT TOPIC

What You Should—and Shouldn't—Share Online

Association executives are often encouraged to post on social media to build their community presence and display thought leadership. If you're a regular poster, check out a recent episode of REALTOR® Magazine's Drive With NAR safety series podcast, "What You Should Never Post on Social Media." It's focused on helping agents maintain a professional image and protect their personal safety. But tips from host Tracey Hawkins and social media superstars Carrie Little and Jeremias "JMan" Maniero will benefit AEs, too—from avoiding the sharing of personal information to conducting an annual social media audit. Be sure to share the podcast with your members.

 nar.realtor/magazine/drive/what-you-should-never-post-on-social-media





AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS

GRANTS

Award-Winning Project Spurred by NAR Grant

In 2022, census data showed that housing inventory in Washington state was the lowest in the country, and the city of Spokane, population 229,000, had only a two- to three-week supply of homes. To help address the crisis, Spokane REALTORS® implemented a National Association of REALTORS® grant to support an objective assessment of market conditions and roadblocks, plus a practical plan for moving forward.

After a strenuous application process, a Counselors of Real Estate Consulting Corps team—with experts in housing, economics and policy-making—conducted more than 30 interviews with Spokane lawmakers, developers and other housing stakeholders. “These stakeholders became vested partners in the recommendations moved forward by the group,” says Eric Johnson, 2020 Spokane REALTORS® president.

The CRE Consulting Corps effort resulted in the 89-page *Action Steps to Increase Spokane’s Housing Supply* report and a regional housing summit for stakeholders. It also laid the foundation for the city’s Building Opportunity and Choices

for All (BOCA) interim ordinance, which put in effect zoning changes that included allowing duplexes, triplexes and fourplexes citywide, allowing townhomes on all residential lots, and reducing vehicle parking requirements, building height increases and more.

The city of Spokane recently earned a 2023 Smart Communities Award from Gov. Jay Inslee, and the interim ordinance has since become a permanent project called Building Opportunity for Housing.

The CRE Consulting Corps project was funded by Spokane REALTORS®, Washington REALTORS®, Spokane Home Builders Association, and a Housing Opportunity Grant from the REALTOR® Party.

“The CRE Consulting Corps project likely added to the body of work that propelled this zoning project forward,” says Darin Watkins, governmental affairs director at Spokane REALTORS®. “REALTORS® here believe this project is critical to our future. The backing by the REALTOR® Party played a key role in helping us defend the rights of housing.”


Adds Tiffany Claxton, RCE,

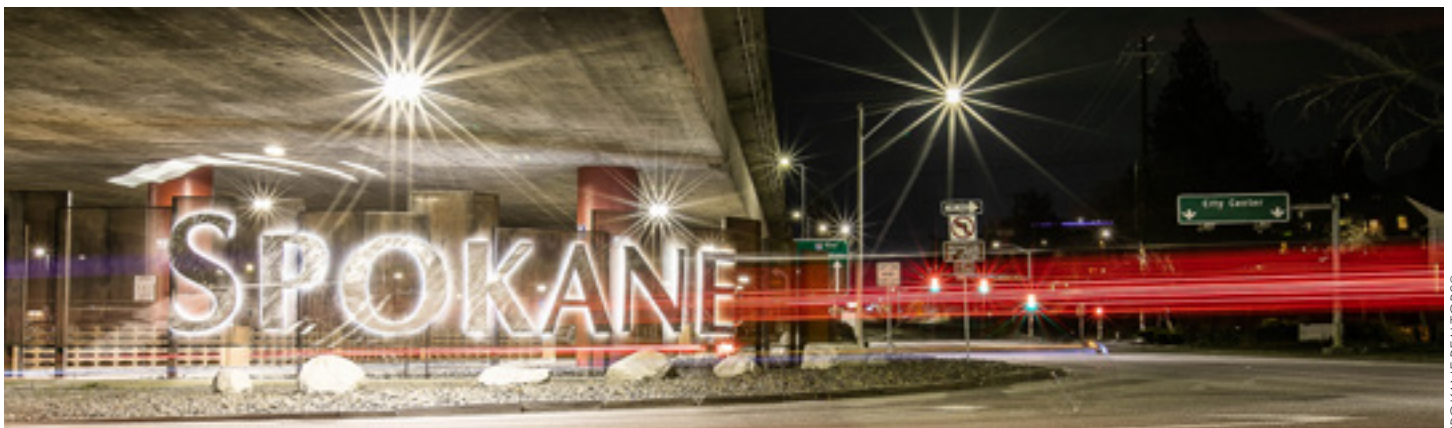


Representatives from Spokane Home Builders and the CRE Consulting Corps stand with Spokane REALTORS®’ retired association executive Robert Higgins (second from left), President Eric Etzel (third from right) and Darin Watkins, governmental affairs director (right).

Spokane REALTORS® CEO, “In addition to infill opportunities allowing for multifamily units in the city, a record number of new residential construction permits have been one of the key developments along with the townhome regulations, which were a specific recommendation of the CRE Consulting Corps report.”

Spokane REALTORS® recommends any association facing housing opportunity issues to enlist the services of the CRE Consulting Corps as an additional resource and advocate for their communities, cities and municipalities.

 realtorparty.realtor/community-outreach/housing-opportunity



A sign welcomes travelers to Spokane near the eastbound I-90 and Maple Street exit.

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GOVERNANCE

Cheat Sheet for Meetings

Knowing when to make a motion and how to respond can be daunting for members new to committee procedure.

So, Boise Regional REALTORS® dreamed up a new tool for new committee members.

The association created a cheat sheet for *Robert's Rules of Order*—the standard for parliamentary procedure at meetings. At committee meetings, members get the cheat sheet attached to their member nameplates. The sheet features a simple flow chart on the front and common *Robert's Rules* practices on the back, with suggested wording like, "I'll entertain a motion to adjourn," and "I so move."

These aren't the only tools available for new members. The association has also created a tiered approach to board leadership for those interested in getting involved, as well as a guide on how to become major investors to RPAC.

Want a copy of the *Robert's Rules* cheat sheet for your association? Reach out to taylor@boiserealtors.com.

TAPPING WISDOM

Past, Present and Future

Looking for a way to engage past presidents? Do it with food, make it fun and seek advice.

Events that bring past presidents together with current leadership teams benefit both groups: Current leaders get a chance to provide an association update, while past presidents get an opportunity to offer advice and support based on their experience.

"It's a way for those who were dedicated and passionate about serving at the highest level to remain feeling like a valued member—not feeling like they are done, gone from the board, and no one cares about their service anymore," says Cindi Siggs, RCE, EPRO, CEO at Gallatin Association of REALTORS® in Montana, who organized an informal past presidents meeting at a former association and plans to launch Gallatin's with the next incoming president.

Siggs and others say organizing such a meeting around a meal or cocktails can help facilitate informal but fruitful discussions between current and past leaders.

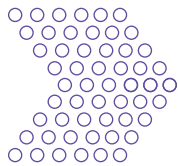
Mohawk Valley Association of REALTORS®, New York, hosts a luncheon, which it describes as an "open discussion," solely for past presidents and its emeritus members.

Naples Area Board of REALTORS®, Florida, invites past presidents twice a year to a Q&A session, in April/May and September/October—"the right frequency to update them and get feedback, while not being overwhelming," says Marty Manion, RCE, CAE, CEO.

Mobile Area Association of REALTORS®, Alabama, sends past presidents an invitation, via snail mail and email, to a breakfast at the beginning of each year. The event regularly attracts 20 to 25 attendees. "The current president says a few words, and then the past presidents tell stories, give advice and show encouragement for the current president," says Stephanie Sharp White, RCE, CRB, who recently accepted a position as CEO of Arkansas REALTORS® Association. "It has been one of our best-received events."

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Pride in What We Do

It's never too early to plan for inclusivity. This June, when Pride Month rolls around, will your association be front and center? Last year, the **Missoula Organization of REALTORS®** took a leading role as the city of Missoula, Mont., population 100,000, held its second annual Missoula Pride Parade, attracting an estimated 20,000 attendees.

MOR raised more than \$30,000 to help support the Pride parade and hosted a lounge. The lounge was part of the association's Homes for All Initiative, which works to break down barriers people might encounter when looking for housing.

"The moment I most recall is the number of other professions who showed up—firefighters, health care, National Park employees—and, of course, our members, who all care about our community," says Jim Bachand, MOR CEO and an LGBTQI+ community member. "Our commitment to supporting Missoula Pride and our Homes for All Initiative exemplifies a strategic approach that intersects diversity, equity and inclusion; fair housing; and housing attainability at all price points."

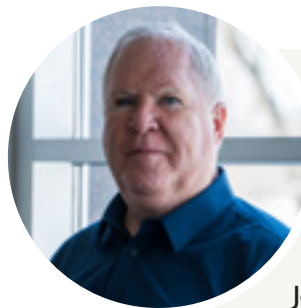
Here are some other events to inspire your Pride Month planning:

- **San Francisco Association of REALTORS®** has marched in the San Francisco Pride Parade alongside city officials since 2014. In 2023, post-parade, 700 community members, including 125 REALTORS®, gathered at the association office to celebrate with refreshments; music deejayed by Jay Pepper-Martens, SFAR's chief technology officer; and a wall display of LGBTQ+ icons curated by SFAR's Diversity, Equity and Inclusion Committee, which was named Local Association Diversity Champion for 2023 by the California Association of REALTORS®.
- **Sacramento Association of REALTORS®**' DEI and Fair Housing Committee partnered with the Sacramento Alliance, participating in the California capital's Pride Festival by hosting a booth and marching in its parade. The booth promoted the mission and vision of the LGBTQ+ Real Estate Alliance and gave away candy and prizes.



SACRAMENTO ASSOCIATION OF REALTORS®

Sacramento Association of REALTORS® members marched in the city's Pride Festival last year.



In Memoriam

The association world said goodbye to a giant this year.

John Fridlington, RCE, CAE—who had served

as CEO of the Saint Paul Area Association of REALTORS® since 2015—passed away on Jan. 7. He had been undergoing treatment for cancer in recent months while continuing to lead SPAAR.

"John's dedication to SPAAR, its members and its staff remained constant even as he dealt with difficult health issues," says 2023 President Brianne Lawrence, who worked closely with Fridlington for the past three years. "Everyone who worked with John was blessed to learn from his expertise and the many insights he shared over the years."

A dedicated association leader for more than 40 years, Fridlington previously served as CEO at the state level in Massachusetts and Florida. He also worked for many years at the California Association of REALTORS®.

He chaired the AEC-RCE Board in 1998 and the AEC-State EO Forum in 2013, in addition to being active at the National Association of REALTORS®, including serving on its Finance Committee, Executive Committee and Board of Directors. He was also a Golden R and President's Circle member of the REALTORS® Political Action Committee and, in 2007, was inducted into the RPAC Hall of Fame.

Fridlington held citizenship in both the U.S. and Ireland, and his ashes will be scattered in Kinsale, Ireland, this summer, following a celebration of life at SPAAR's headquarters in the spring.



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WHAT CAN EACH

GENERATION

TEACH US?

**The answers just might surprise you.
 AExperience invited five association executives
 representing multiple generations for a roundtable
 discussion on the generational challenges we're all facing.**

Today, five different generations make up our workforce: The Silent Generation (born 1928 to 1945), Baby Boomers (1946 to 1964), Generation X (1965 to 1980), Millennials (1981 to 1996) and Gen Z (1997 to 2012). And not too far behind are Generation Alpha (2013 to 2025) and Generation Beta (2025 to 2039).

It's no wonder many of us struggle with managing a workforce with so many different generational experiences, attitudes and customs. AExperience brought together association executives of various ages to talk about these generational struggles and what each generation can teach the others. The conversation has been edited for length and clarity.

Moderator Kim Pontius: Good afternoon, everyone. Up first, when it comes to workplace dynamics, what is it about your generation that you would like to impart to older or younger generations?

Leslie Frazier: Hey, everyone! Proud millennial here. I know a lot of older generations may feel like we come into an organization wanting to talk about every single problem that's there and how to fix it. I think a lot of that has to do with our education. I have baby boomer parents, and a college education was constantly enforced in my household. As millennials have gotten a little older, we realize we now might need master's degrees. I think the various things we've been exposed to in our education fuel a lot of our passion and desire to come in and make impactful changes.

Derek Sprague: I had the opportunity to work with my dad for 20 years, from his 60s to his 80s. And when I first started, it was a very difficult thing. Regardless of what I saw as inefficiency, that's the way that it was going to get done. What I came to find out is that there are opportunities to play off each other's strengths and weaknesses. That's where we found we were

able to really work well together throughout that whole process.

Amanda Creel: Sometimes I think the phase of life [causes] the disconnect. Because a new generation comes into the workforce, and we're all of a sudden very negative about [that] generation. We have to remember what it was like to be at that [younger] phase of life and give that respect and professionalism and that grace to let them find their way.

Janet Kane: I think the most frequent points that become challenges between staff of different generations are one's perception of the other's work ethic. My advice is that no matter what your generation, professionalism is always expected. You get paid to come to work and be respectful, not to use your generation, wherever that may fall, as an excuse to be rude, abrupt or disagreeable. You can disagree without being disagreeable.

Pontius: The one thing that keeps coming up to me is the eye rolls, witty repartee, or thinly masked sarcasm. I agree and would like to train all the generations to have mutual respect.

Sprague: Different generations have their own ways of communicating, but it is important to lay it on the table and have a conversation. If folks are being told what to do without understanding why, it leads to a lot of miscommunication.

Frazier: I'm a millennial, but I'm also from the South, was raised in the church, and grew up in a military community. So, some of the reactions—eye-rolling or certain sarcastic things—I wouldn't do because that would have been disrespectful in my house growing up. So, as you get to know people and understand where some of that [behavior] is coming from, it might be things outside of just the generational differences. And then, you can really work toward more common ground.

THE AEs



Kim Pontius, RCE, CAE, moderator, CEO, Aspire North REALTORS®, Michigan, baby boomer



Amanda Creel, RCE, CAE, CEO, Birmingham Association of REALTORS®, Ala., millennial (but two months shy of Gen X)



Leslie Frazier, RCE, senior vice president of community and industry relations, Virginia REALTORS®, millennial



Janet Kane, RCE, CAE, CEO, Cape Fear REALTORS®, North Carolina, baby boomer



Derek Sprague, RCE, CEO, Bakersfield Association of REALTORS®, Calif., millennial

Pontius: Let's talk about a scenario: You just hired a junior staff member, and they don't hesitate to tell you what they think is wrong with the association. How do you respond?

Kane: I love to thank them for their insight, encourage them to continue to share their ideas for improvement with me, and sometimes I've asked them to assist with some idea that they've brought to me. No. 1, it helps them become accountable for implementing the idea. No. 2, they know that I'm taking their comments seriously. And No. 3, it helps them understand how difficult it is to actually implement a change. If you don't [help someone learn by doing], you don't know what fabulous idea you might be missing out on. And they will never come to you again if you shut them down from the start.

Frazier: I don't have any staff at the moment, but I love talking to Gen Zers behind me. I've become the big sister to many of them. One thing I have found is if they feel like their voices aren't being heard or they're being mistreated at work, they will leave very quickly. I got this advice from my aunt: Let's say a young staffer has an idea that you know won't work, but it won't be detrimental if they try it—let them try it. They can go through their idea and see, “Oops, that really didn't work. I guess my boss was right,” or “I should have listened to their advice.” Let them fall a little bit and then help them up through the process.

Pontius: Let's go to the flip side of this. If you're Gen Z or a millennial, how do you address situations where you feel your voice or perspective hasn't been heard?

Creel: I may be the CEO, but a lot of my leaders are senior to me. So, I just try to find a way to tell the same story that's not so focused on *me* telling the story—data, statistics, video—to get them to see it from a different perspective.

Sprague: When I try to implement a plan, when I'm talking about it, I have tendency to jump to the punchline without telling the lead-up of the joke. Whereas when I write it out first, I can lay out a really good background for it and then can say, “Here are the key points,” and guide my thought process. Then, build a team around it. If there's one sour apple in the mix, but everyone else on your staff is like, “Hey, this is a fantastic opportunity,” that's sort of infectious.

Pontius: Let's talk about work-life balance. If you're sick, do you call in or push through it? (I push through it.) Do you block “me time”? (Never do.) Do you check work email while technically on paid time off? (Always.) I'm curious to hear from the rest of you.

Frazier: [Laughter] I do feel like there is a belief from older generations that exhaustion equals success. But a lot of us millennials might say, “Look, if you want me to continue to produce, I'm shutting it down at 5 or 5:30 p.m.” But generations aside, especially after COVID-19, everyone

now is like, “If you're sick, please don't come to the office.” With the emergence of remote work, if I'm sick—and it doesn't require leave—I'll just work from home. When I'm on leave, I'll check my email a bit just so it doesn't get overwhelming. And if it's an emergency, I'll respond. But I believe in balance so that you can come back fresh and be productive. If you're carrying work into your vacation, you're never fully resting, and that will definitely catch up with you later.

Bonus Question: What helps fuel you?

- **Kane:** Anything by Simon Sinek or Jon Gordon, in particular, *The Energy Bus* by Jon Gordon and Ken Blanchard.
- **Sprague:** *Start with Why* by Simon Sinek.
- **Creel:** *Leaders Eat Last* by Simon Sinek, but the biggest thing is networking groups and other AEs.
- **Pontius:** National Public Radio and its website for everything from music to news to inspirational and motivational stories.
- **Frazier:** Mindless television!

Kane: I had great mentors, one of them being Steve Francks, who just retired as CEO from Washington REALTORS®. He just said—and he didn't mean this in a bad way—“Everyone's dispensable. You can take your time off.” Also, I had a great assistant who started timeblocking my lunches on my calendar and adding 15 minutes of meeting prep time before every meeting. Because if you don't take charge of your time, somebody else will fill it. As far as vacation, I'll put one person to be the contact for my auto out-of-office [message]. Everybody knows if it's an emergency, they contact that one person, and that person is going to text me and say, “Hey, building's on fire. We need you.”

Creel: When I'm on vacation, my team knows me; they know to put an emoji of a dumpster fire (🗑️), and I'm there. I am definitely not the best example. I push my staff really hard to be the exact opposite of me: “You guys need to recharge. You need to take your time off.”

Sprague: One thing that's different is the fact that a lot of us are taking care of elderly family. So, if you have someone who's trying to push through and come in sick, it's disrespectful to put co-workers in a position where they're being compromised, which would compromise their family. On work-life balance, I'm the same way that everyone's talking here [about struggling to detach from work]. Part of that is the fact that a lot of our members are small business owners, and their clock doesn't stop. I'm sympathetic to that.

Pontius: Kind of interesting, since you mentioned emojis: When it comes to communication preference, what's “in” for you, from how you prefer to communicate to the emojis that you use—or don't use?

Sprague: I'm pulling up my phone right now. I used to be a big “100” (👍) emoji guy. I'll respond a lot of times with the thumbs up (👍), the skull (💀) for when I'm dying laughing, and maybe I'll do the whale (🐳) emoji if it's “oh whale.”

Frazier: I am the youngest person on this call, and I don't use emojis at all at work. And as much as I love to talk, I don't really like spur-of-the-moment calls. Usually, it's a request for something I have to then email or text. I prefer the latter two, because I can schedule things more efficiently and avoid drawn-out conversations.

Pontius: My kids just mock me constantly about texting, because I'm one of these people—my punctuation and my spelling has to be accurate. And they're like, "Really?" I've gotten myself in trouble with emojis, so I use them very sparingly. I prefer just to pick up the phone and call people.

Creel: I think it's about a style. For me, it's over-communicating, right? I teach the team to do that. I teach our board to do that. You have to tell most people something seven times, seven different ways. So, I don't care how we tell them. As long as it's professional and we get them to hear us, I'm happy.

Kane: My favorite probably is texting, but that's really because if I'm in a meeting, it's easy to just respond. I also do appreciate emails if it's really a question that I want to think about, so that I can make sure the wording is understood with the intent that I mean. If it's a serious conversation, we're going to schedule a time [to talk], especially if it's a personnel issue.

Sprague: Millennials love efficiency, and in my email, I've built out a ton of ways to be efficient. Part of the problem is if I'm in a meeting like this, I'll get a text message and I'll glance at it, and then it might be a couple hours before I'm like, "Oh, I got a text message I need to respond to." The other thing that I can't stand is there are so many other methods to communicate—Slack, Teams, WhatsApp, Facebook messenger. So, simplifying that back down is necessary.

Pontius: Now here's a great question: **How comfortable are you sharing personal experiences at work? Being the Boomer that I am, it was drilled into us growing up that you just didn't talk about your personal life. You never asked any personal-leaning questions, right down to, "I know you were sick yesterday; how are you feeling today?" That was right on that fine edge.**

Kane: I'm guilty of sharing both work and personal stories. The hardships our employees face are sometimes personal as well as work related. It really just comes down to supporting them in the moment and letting them know I care and understand.

Creel: I want staff to feel like they know me as more than just the lady in the office whom they have to give a report to. I want to have a relationship with them.

Frazier: I'm very much a people person. But I'm open [to sharing] as in, "What'd you do this weekend? How is your family?" Before the REALTOR® association world, I worked for two governors. So, I always have the hat on of everything you do represents whatever organization you're with, so you have to be careful.

Sprague: I've looked at my old MySpace and Facebook and been like, "Ugh, should I purge that stuff?" But that's part of

what made me who I am today. I don't mind telling the story of how that led to me here. I think it's important to be authentic.

Pontius: Finally, what is one common generational misconception you'd like to debunk?

Creel: I want to fight for Generation Z, which is weird, but I have kids who are Gen Z, and there's this idea that they only have a phone in their hands and that's all they know how to do. But if you look at the stats, they actually like face-to-face communication more than some of the generations that precede them, especially when it comes to professional settings.

Sprague: Going back to working with my dad, that boomers can learn new tricks. [Pontius laughs.] When I first started here, I was breaking out in hives over how much inefficiency was going on. But as we started demonstrating we can break down headaches and barriers and make processes more efficient, buy-in started happening. Then we've got people who are just leaping up and owning those things that make your life easier.

Kane: Thank you, Derek, for that lead-in, because I was going to say the one that everyone thinks, that Baby Boomers don't like technology and don't adapt to it. We have probably had to adapt more than any other generation. I still remember rotary phones. We had to go from that and keep up with generations that have never known how not to make something happen by touching a screen. But as we get into the AI world, I just hope people don't forget how to express their own thoughts and use their own words. And how to think before you speak.

Frazier: I'm 33 and already on career space No. 3, so I do think there's a perception of millennials hopping around and not being committed to one particular job or space. I would challenge that. We want to have a lot of different experiences so that when we do get to that next job or next phase, we're not only bringing in experience related to the role, but also taking what we've learned to hopefully then have a greater impact in the current role and the organization.

Pontius: From the baby boomer perspective, I will tell you, don't take us at face value. We used to be very different people. I know I was. But we're going to come back to that word "respect." There's wisdom among those who are older that I don't think should be disregarded. Younger generations want us to hurry up, pick up and be gone, but with that goes an incredible amount of institutional knowledge, because nobody cares about what was, they only care about what's coming.

I always liked what Harry Truman said: "There is nothing new, only the history you don't know." There are skills, and then there are abilities and intelligence. But ultimately the time factor has to come in to make wisdom. ●



Develop Your Leadership Style—and Empower Others

By applying leadership skills and overcoming your own fear and self-doubt, you can bring greater power to the role of association executive.

BY COLETTE MASSENGALE

“**Y**ou don’t have to be some kind of genius to crack the EP code—you must simply act, speak and appear in ways that set you apart as a leader,” says Sylvia Ann Hewlett, an economist, the CEO of Hewlett Consulting Partners and an award-winning author whose books include *Executive Presence 2.0: Leadership in an Age of Inclusion*.

The term executive presence has come under fire in recent years for conjuring an authoritarian management style, but it’s really about how we show up each day. Reflecting on what we can do to be the best versions of ourselves at work and elsewhere is a worthwhile endeavor, particularly for those who are newer to the role of association executive. New research conducted by Hewlett shows that cultivating executive presence is a game changer and can motivate members and staff alike to achieve association goals and priorities.

Being Heard and Understood

Hewlett describes executive presence as what we signal to the world in terms of our gravitas, which is our ability to get our ideas across and be heard, and how we present ourselves to the world. Leaders who have gravitas are respected for their seriousness and depth of ideas. Rebecca Newton, senior visiting fellow at the London School of Economics and Political Science, explains that having gravitas helps us to be more persuasive. Getting our ideas across and being heard require that we communicate strategically, keeping these facets top of mind: our target audience, how we will deliver our message and the best channel to convey our message. Being cognizant of how we present ourselves to staff and members demands that we pay attention to our body language, including our posture, gestures, facial expressions, eye contact and the level of confidence we project.

The PRES Model

Effective leadership begins with being present. Belle Halpern and Kathy Lubar, authors of *Leadership Presence*, define presence as the ability to grab people’s attention by connecting authentically with their thoughts and feelings and inspiring them toward a desired outcome. Using skills they developed as performers (Lubar was an actor and Halpern was a singer), they established the PRES Model of Leadership Presence. This model emphasizes being in the moment and flexible enough to manage the unexpected; building relationships through empathy; listening; establishing authentic connections; expressing our feelings and emotions appropriately using our words, voice, body and face; and living our values.

One of the biggest obstacles to being present is that voice in our heads that constantly judges our actions. Halpern and Lubar call it the “inner critic,” and it’s tricky. The good news is there are ways to manage so it doesn’t prevent us from achieving our goals. One suggestion they share that I will vouch for is writing a letter to your inner critic. The idea is to acknowledge it and get the thoughts out of your head and onto the page as a way of making peace with it.

Another challenge that gets in the way of being present is fear. Halpern and Lubar explain how fears of failure, of what others think and of not being good enough detract from our ability to be in the moment. They make the point that it’s not the fear that keeps us from being present, but the thoughts we attach to fear that create the problem. Their proven practices for overcoming fear include feeling yourself being grounded, breathing purposefully in the stomach, letting thoughts go and letting feelings be.

The Evolution of Executive Presence

In “The New Rules of Executive Presence” in *Harvard Business Review*, January/February 2024, Hewlett explains how the traits within each category of executive presence (gravitas, communications skills and appearance) have evolved. Regarding gravitas, she notes that while confidence and decisiveness are still important, being inclusive and showing respect for others are equally valued. Maureen Frank, chief disruption officer at emberin in Australia and an inclusion and diversity expert, notes that being inclusive means being fair, showing respect and giving people the opportunity to help the organization succeed on their terms. Taking steps to make staff

The Whole Package

Up to 90% of what we communicate is nonverbal, so whether you’re addressing members or staff:

- Be aware of your posture.
- Recognize whether you are coming across as relaxed or anxious.
- Use your hands the way you would in a casual conversation. The goal is to discover your natural style, letting your hands do whatever they would do if you were speaking to a friend. At the end of the day, you want to use your hands in a way that advances your message.
- Keep your face relaxed, interested and animated.
- Maintain eye contact with the other person so you make a connection.

An absolute key to using your voice, body and face to enhance your executive presence is to make sure all three are communicating the same message. If they are not, your credibility goes out the window.

and volunteers feel supported in this way can inspire them to act in furtherance of the association’s mission.

According to Hewlett, communicating effectively today includes mastering virtual meetings and listening attentively. Successfully facilitating a virtual meeting takes preparation. Doing tech checks, being considerate of our audience and the different ways they learn and absorb information and speaking in a conversational tone go a long way, as do checking in with people who haven’t spoken and following up after the meeting with a summary of the actions taken. Honing our listening skills also pays dividends. It strengthens relationships and helps us to be more persuasive because we satisfy the other person’s desire to be heard. When we practice effective listening skills, we refrain from making assumptions, and we build connection with the other person. Coupled with asking the right questions,



Practicing Executive Presence Looks a Lot Like Overcoming Bias

We all benefit from practicing the skills needed to develop our executive presence—skills such as being inclusive, listening attentively and asking the right questions.

As I was preparing this article, I immediately saw a connection between those skills and the foundational principles and tools discussed in the National Association of REALTORS®' "Bias Override" course.

The course uses the acronym B.R.I.C.K., which stands for belonging, respect, investment individuation (the process of respectfully seeking information about individuals rather than presuming to know

them based on their race, gender or other characteristics), conversation and kindness, to help guide students through the process of recognizing and overriding our biases and avoiding violations of Article 10 of the NAR Code of Ethics and the Fair Housing Act.

As someone who has been studying and teaching executive presence for many years, I believe B.R.I.C.K. can also be a powerful aid for developing our executive presence.

Learn more about NAR's Anthem Award-winning "Bias Override" course, including how to bring it to your members, at nar.realtor/bias-override.

being generous with our time in this way will win the day every time.

When it comes to our appearance, Hewlett reports that authenticity has become a prized attribute.

"People feel you're authentic when they know what you're about and they see that you act in ways congruent with what you say about yourself. ... People feel you are authentic when you don't pretend to be someone you are not," say Halpern and Lubar. They outline three rules for authenticity: 1. Being comfortable in your own skin and open to growth; 2. Living your values; and 3. Connecting with your work. Following these rules creates space to build trust and connection. There is no place to go from there but up.

Take Your Leadership to the Next Level

As discussed in Olivia Fox Cabane's book, *The Charisma Myth*, a powerful tool for honing our executive presence is visualization. Professor Stephen Kosslyn, director of Stanford's Center for Advanced Study in the Behavioral Sciences, wrote to Cabane about the science behind visualization. Kosslyn explains that when we imagine that we are performing an activity, we activate

the parts of the brain that are used in performing that activity. Visualization is one of the most effective charisma-boosting tools, Cabane says, because of its mental and physiological effects. She outlines a simple technique for developing our visualization skills:

- Close your eyes and relax. Employ your senses as you focus on a moment in your life when you felt triumphant.
- Hear the sounds in the room: the murmurs of approval, the swell of applause.
- See people's smiles and expressions of warmth and admiration.
- Feel your feet on the ground and the congratulatory handshakes.
- Above all, experience your feelings, the warm glow of confidence rising within you.

Try it out when you can. I've done it, and it works. For more, visit askolivia.com/exercises.

If you are a fan of TED Talks, as I am, you know the power of storytelling. Telling stories is incredibly effective because it enables us to connect with the hearts and minds of our audience. A highly rated TED Talk and one of my top five favorites is Bryan Stevenson's 2012 TED Talk, available on YouTube. In it, he shares stories about the people

who influenced his search for justice. Carmine Gallo, author of *Talk Like TED*, explains why Stevenson's TED Talk is so impactful. He says, "Brain scans reveal that stories stimulate and engage the human brain, helping the speaker connect with the audience and making it much more likely that the audience will agree with the speaker's point of view."

Finally, taking time to self-reflect matters. Halpern and Lubar ask whether having knowledge of yourself changes you. I believe it does. They assert that knowing our limitations helps us cultivate the skills needed to surmount those limitations. Two other points they make that resonate with me include viewing life as a journey of personal growth and seeing mistakes not as failures but as opportunities to learn.

Speaking of self-reflection, on my own journey to developing my executive presence, I have struggled a great deal with fear and with managing my inner critic. I remember the very first class I taught. It was a three-hour Legal/Legislative Update class held in Easton, Md., a two-hour drive from my home in Baltimore. My plan was to use the drive time to decompress, relax, breathe and get in the right frame of mind. As soon as I got there and saw the ballroom and all the people, all my preparation went out the window. My nerves got the best of me, and it was downhill from there. I clawed my way through and vowed never to teach again. After about six months, I got back on the wagon. Over time, with practice, I improved. To this day, I still get nervous when speaking publicly, but these tools have helped me develop my executive presence. The work continues! ●



Colette Massengale is an attorney and senior policy representative for fair housing policy with the National Association of REALTORS®.



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An AE's Journey With LEADERSHIP Coaching

*In the association world, you have to stay ahead of the curve—
and a leadership coach might just give you the drive to get there.*

By Meighan Harris, RCE, IOM

As the CEO of a transformed and thriving REALTOR® association, my journey in the real estate industry these last 10 years has been nothing short of exhilarating. I have witnessed the market's ebbs and flows, navigated through dynamic policy changes and led a dedicated team through both challenges and triumphs. Yet, in the ever-evolving landscape of REALTOR® association management, I recognized that my “zest” for the job was starting to dwindle. Getting to the end of the workday sometimes felt like an eternity. During some self-reflection, I started considering that maybe I needed more personal and professional growth, but not through the usual training programs. This realization led me to a decision that has profoundly affected not only my leadership skills and my personal life, but also the entire trajectory of our association: the decision to hire a leadership coach.

The Catalyst for Change

In an industry where adaptability and foresight are paramount, staying ahead of the curve is not just a choice; it's a necessity. The decision to bring in a leadership coach was born out of a desire to not merely meet industry standards but exceed them, to lead with a vision, and to be able to end each day feeling productive and not like I had been chased by a proverbial bear. (I use that analogy because medical professionals have compared stress that we deal with these days as the equivalent of a caveman being chased by a bear.)

The long days of to-do lists, member issues and staff management—while exceeding expectations and satisfying members—

are stressful. Not to mention after-work curriculars for two kids, dealing with a divorce, grocery shopping, laundry, meal prepping and all the other “fun” stuff that comes along with running a household. Did I also mention the fact that I am finishing my college degree?

These challenges required something beyond traditional management skills. The need for more focus in strategic vision, effective communication, timeblocking and team empowerment became increasingly apparent. I had big-picture ideas, and I had the perfect leadership team behind me, but I lacked time to implement and follow through. I was trying to take on too much and not looking to the strengths of those around me to share the load. I found myself getting to the end of the day with the large tasks I needed to get done overshadowed by constant interruptions and whirlwinds, causing my to-do list to become dauntingly large. I needed to control my schedule and plan my days with purpose.



Meighan Harris (left) with the 2024 board of directors for Bonita Springs-Estero REALTORS®.



Coaching Women in Leadership

BY JENNIFER HENRY

Almost every high-achieving woman I work with faces a common challenge—fatigue. This pervasive exhaustion acts as a hindrance to the potential of powerful women in the workforce, limiting not only their ability to achieve the life they aspire to but also dampening their overall sense of joy. Diminished joy results in a daily presentation that falls short of excellence, and often the blame is placed on “the job.”

From a biological standpoint, this fatigue is understandable. Considering the rapid societal and technological changes in the last century, it’s not surprising our wiring hasn’t fully adapted to accommodate the roles of nurturer, homemaker and mother while simultaneously pursuing careers. It’s not that we can’t fulfill these roles, but we must acknowledge that we have essentially doubled the demands placed upon ourselves. The expectations to manage a household, maintain fitness, be an outstanding friend, mother, wife and lover persist despite working full time and advocating for equality in the workplace. We’ve inadvertently increased our expectations without fully realizing the repercussions.

The toll on us is steep, manifesting as what I refer to as “The 3Ds”: disease, divorce and depression. These challenges have surged in our society over the last few decades, showing no signs of improvement.

However, there is a better way. Every woman, regardless of her role, needs to comprehend and make peace with the expectations and demands of her life. Simultaneously, we must recognize that, at work, we are more than just “workers.” Five energy types are at play within us:

- | | | |
|--------------|--------------|--------------|
| 1. Physical | 3. Mental | 5. Financial |
| 2. Spiritual | 4. Emotional | |

While physical fatigue is commonly blamed, all these aspects contribute to feelings of tiredness, stress or exhaustion—terms women often interchange to describe the overall lack of “neural energy” needed for our daily lives.

I term this vital neural energy “zest,” the spark within us that fuels excitement about life. It propels motivation, leadership, productivity, love, grace and all the qualities expected of us daily. When any

one of these energy sources is depleted, it triggers a cascading effect in the body, resulting in fatigue.

For instance, a high-achieving woman with good physical health may still feel drained if she’s in a toxic relationship. Recognizing these hidden energy drains is why I approach coaching holistically. I understand that my clients bring unique talents, goals and dreams, but if they aren’t “whole,” realizing their full potential becomes a struggle. Therefore, our coaching begins with an assessment to identify hidden energy drains, followed by creating awareness, engaging in dialogue and implementing practical solutions.

By embracing coaching with this approach and demonstrating a profound respect for a woman’s expectations, we empower ourselves to make bold decisions regarding the harmony between work and home life. We advocate unwaveringly for the best versions of ourselves, and we foster improved work performance without imposing more demands to “just work harder.”

Jennifer Henry is a professional coach with Lifestyle Recovery Solutions in Riverside, Calif.

Leadership coaching was no longer a want for me—it was a need. So, I sat down with my president and vice president. I expressed my desire for a coach, what I was looking to gain, and what I thought the return on investment would be to the association. Thankfully, my leadership team strongly believes in coaching and professional development, so they approved the idea without hesitation. It helped that the cost for coaching fit in with the current budget line item for staff development and education.

Embracing Growth Through Coaching

A leadership coach is a strategic partner in your leadership journey who can help identify blind spots, capitalize on strengths and navigate through leadership challenges. My job was to be honest with myself and my coach and to approach her coaching style with an open mind and willingness to listen and change. It required a shift in perspective, a recognition that seeking external guidance is not a sign of weakness but a commitment to continuous improvement.

The process began with a comprehensive assessment of my top five strengths using the CliftonStrengths assessment. My coach explained that if you aren’t working within your top five strengths, it can be ex-

hausting trying to accomplish things. We also discussed my pain points, my goals and a day in the life of Meighan. This introspective analysis laid the foundation for a tailored coaching plan.

Strengthening Communication and Collaboration

Through coaching, I gained valuable insights into enhancing communication strategies within our association and among my staff. I also had my staff members take the CliftonStrengths assessment to have a better understanding of what drives them. As a result, I started asking better questions, which gave me clarity and the ability to offer better direction. We also started doing daily morning huddles, setting daily objectives, creating lead and lag measures, and doing monthly check-ins.

With my staff on the same page with me, collectively and collaboratively, we all worked more effectively on the association’s vision and strategic plan.

I took it a step further to include my committee chairs and leaders so they were aware of the changes I was making. I wanted their help and buy-in. I have always been an authentic leader; transparency is part

of what makes me who I am, even if it means being vulnerable at times. The emphasis on resilience and change had a trickledown effect, fostering a collective mindset that views challenges as opportunities for growth and innovation. It also opened conversations for constructive feedback.

I must say that not everyone was open to the changes I was making. I did lose a staff member who had worked with the association for many years. This change in staff cleared an obstacle that I didn't realize was impeding progress and opened some new doors for positive change.

Quantifying Success

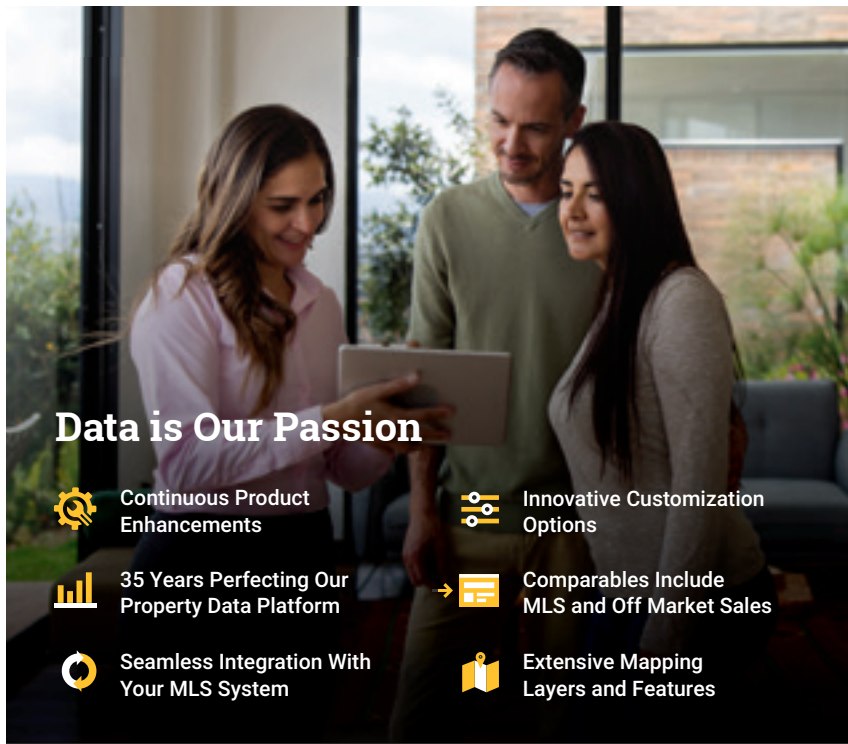
My coach worked with me to put my areas of needed focus in three buckets: leadership and vision, CEO operations, and member outreach. My priority tasks include one-on-one visits with brokers, community partnerships and the successful rollout of new projects, to name a few. To prevent distractions, I timeblock my calendar, making sure that I concentrate on the elements in each bucket, delegating to my staff when appropriate or setting it to the side as a "parking lot" issue.



The decision to invest in leadership coaching proved to be a wise one, with a substantial return on investment evident in both quantitative and qualitative measures. My results have been tangible and transformative. We are meeting and exceeding our goals, communicating effectively and working collaboratively with our eyes on the same prize. My staff members are also functioning at a higher level of efficiency and professionalism. I am very excited about being able to go to my CEO review in October 2024 and report on all the accomplishments we will achieve this year.

Leadership is not a destination but a continuous journey. The strategic move to invest in leadership coaching has been a game-changer for our REALTOR® association. It has propelled us into a future of possibilities, where adaptability, collaboration and resilience are not just buzzwords but integral elements of our organizational DNA. ●



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








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Dispelling Five Myths About the Proposed Settlement

NAR is correcting the record, and you can help.



ational Association of REALTORS® leaders know that AEs are on the frontlines answering questions from members and communities about the proposed settlement announced on March 15. To ensure you can do that, NAR is correcting the record on five misconceptions about the settlement. You can help by challenging inaccurate information that you see appearing in social media posts, news articles or elsewhere.

1 Myth: The proposed settlement only covers a fraction of members.

Fact: Nearly every real estate professional who is a REALTOR® is covered by the release that NAR negotiated in the settlement. The agreement would release NAR; more than 1 million NAR members; all state, territorial and local REALTOR® associations; all association-owned MLSs; and all brokerages with an NAR member as principal whose residential transaction volume in 2022 was \$2 billion or below from liability for the types of claims brought in these cases on behalf of home sellers related to broker commissions.

To be clear, NAR members are covered by the settlement unless:

- They are affiliated with HomeServices of America or one of its affiliates, or
- They are employees of a defendant in the remaining Gibson/Umpa lawsuits in Missouri.* (Note: All independent contractors affiliated with the Gibson/Umpa defendants are covered.)

2 Myth: NAR left large corporate brokerages and affiliated agents to fend for themselves.

Fact: NAR fought to include as many people and companies in the release as possible and achieved a release for everyone it could. More than 1 million members are covered, as are tens of thousands of businesses operated by REALTORS®.

But, despite NAR's efforts, the plaintiffs did not agree to include everybody. Those that are not released—the largest companies in our industry—are no worse off now than they were before the settlement. In fact, many are better off, as thousands of their independent contractor real estate agents are released by the settlement.

Additionally, NAR's settlement provides an avenue for most large corporate brokerages with an NAR member as principal and more than \$2 billion in residential volume in 2022 that were not included in the settlement to pursue inclusion in the release. But the settlement does not obligate them to opt into the settlement. These brokerages will have 60 days after plaintiffs file the motion for preliminary approval of the settlement to complete Appendix C (see facts.realtor) of the settlement agreement, which is required to opt into the settlement if they choose to do so.

3 Myth: The settlement hurts minority and first-time home buyers.

Fact: This settlement would preserve the choices consumers have regarding real estate services and compensation.

Under the terms of the settlement, offers of compensation could continue to be an option consumers can pursue off-MLS through negotiation and consultation with real estate professionals. NAR continues to believe that offers of compensation help make professional representation more accessible, decrease costs for home buyers to secure these services, increase fair housing opportunities, and increase the potential buyer pool for sellers.

4 Myth: MLSs are no longer a valuable or useful part of the transaction process.

Fact: MLSs have always provided significant value to local businesses beyond communicating offers of compensation. They:

- Enable comprehensive marketplaces. Access to inventory and widespread advertising incentivizes local broker participation.
- Ensure reliable data access. NAR guidelines for local MLS broker marketplaces enable hubs of trusted, verified information where all participants have equitable access.
- Create connections. Local MLS broker marketplaces create the largest opportunity for connections between real estate agents with properties to sell and

those with clients looking to buy.

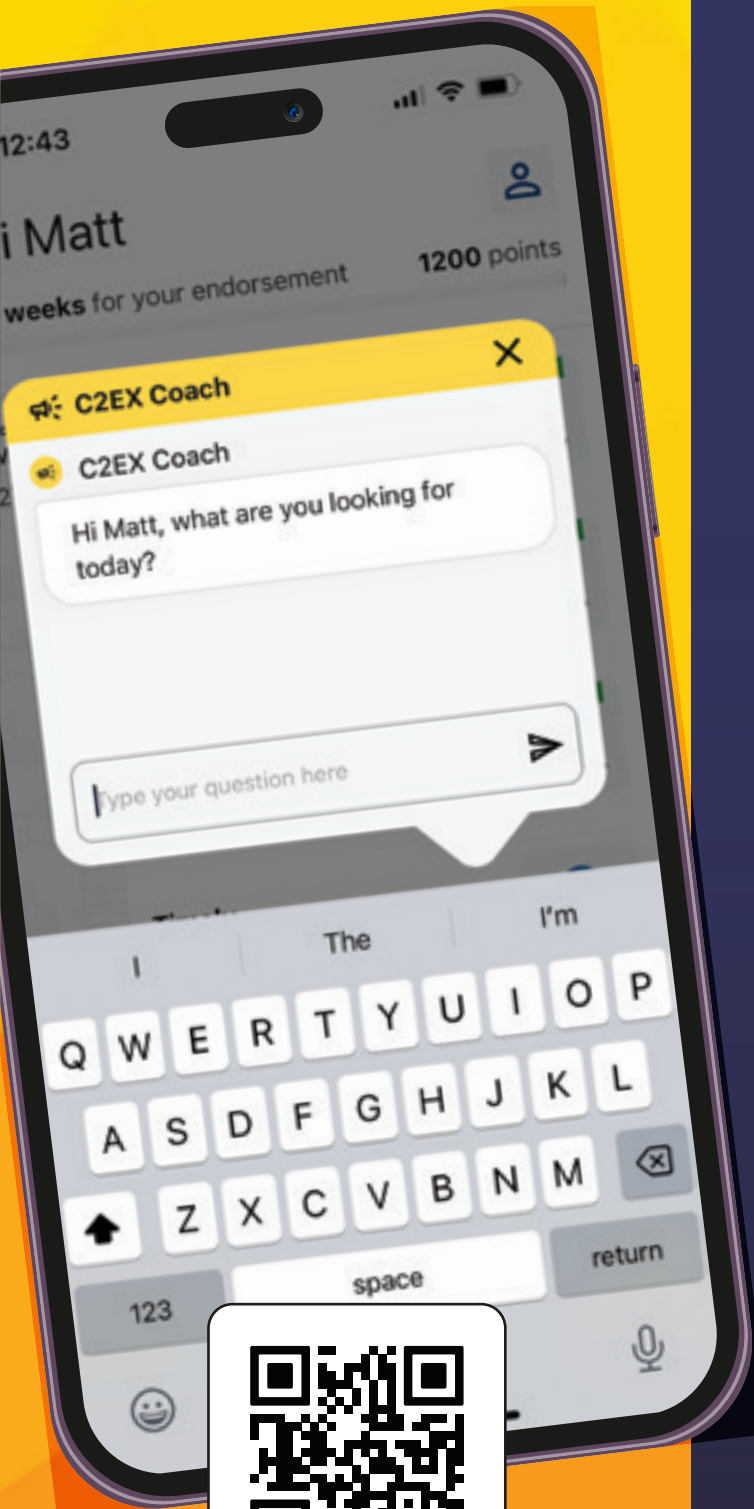
- Advance small business. Compiling housing information that is accessible to all businesses, in one place, allows smaller real estate brokerages to compete with larger ones.
- Encourage entrepreneurship. Because of lower barriers to entry enabled by local MLS broker marketplaces, new market entrants can advance technology, consumer service and other innovations.

5 Myth: NAR will no longer have resources to devote to important advocacy efforts in Washington.

Fact: NAR will be able to pay the settlement amount over time. NAR will not change membership dues for 2024 or 2025 because of this payment.

The NAR Finance Committee and Strategic Planning Committee will remain critical in reviewing and providing guidance about NAR's operating budget to help ensure association executives can continue to deliver unparalleled value to, and advocacy on behalf of members, including through our learning opportunities and resources, research, and member tools. ●

**Editor's Note: At press time on April 11, in addition to HomeServices of America and its related companies; the remaining defendants not covered by NAR's settlement are: At World Properties, LLC; Douglas Elliman, Inc.; Douglas Elliman Realty, LLC; eXp Realty, LLC; eXp World Holdings, Inc.; Hanna Holdings, Inc.; HomeSmart International, LLC; Howard Hanna Real Estate Services; Realty ONE Group, Inc.; Redfin Corporation; United Real Estate; and Weichert, Realtors®.*



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No One Likes Performance Evaluations

Here's how you can avoid surprises, reduce rater error and end the year on a high. **BY CAROLE KAPTUR**



What is the one statement that everyone can agree with regarding performance evaluations? If your answer is, “No one likes them,” you’d be correct. Yes, you heard it from the HR person—no one likes performance evaluations. The primary reasons are that people are uncomfortable giving and receiving feedback and don’t like working with misaligned expectations.

So, why do them if no one likes them? Because we need some form of accountability, some manner of documenting how we did throughout the year—to support promotions and merit increases and, unfortunately, sometimes for terminations.

Set Expectations, Avoid Surprises

Performance evaluations tend to go more smoothly when appropriate goals and competencies are clearly identified at the beginning of the performance period. Combined, goals and competencies form expectations.

Let’s take a step back and talk about competencies, because they are often more important than whether we achieve goals. Why? Let me put it this way: Goals are what we do, and competencies are how we do them. We can achieve every single goal on the list and more, but if we leave a trail of tears behind us wherever we go, we aren’t effective in our jobs.

The what and the how work together. I receive so many calls about employees who are stellar at getting things done, but no one wants to work with them.

We want to ensure the competencies (combination of knowledge, skills and abilities) are thoroughly understood, because they contribute toward managing and understanding expectations.

It’s easier to perform well—and even outperform—when we know what is expected of us. It’s also harder for supervisors to be capricious in their evaluations when expectations are clearly stated from the start.

Sometimes people don’t like the idea of setting expectations because they claim they’ll be boxed in, and expectations don’t allow for changes. That’s just plain and simple nonsense. Of course you can mutually agree to make

changes in expectations! It’s often necessary because we live in a dynamic, ever-changing environment.

You’ve heard the stories:

- “I had no idea I was being evaluated on x.”
- “No one ever told me I needed to do y.”
- “I didn’t even know I was getting my evaluation that day.”

To avoid these situations, the essential factor in the process is communication. Communicating expectations at the outset and throughout the year will ensure a fair and well-reasoned evaluation and prevent the single most dreaded aspect of performance reviews—surprises!

No matter which style of performance evaluation a manager chooses to use, a positive and productive evaluation meeting won’t happen if there is a failure in planning and communication.

Potential Errors

Rater errors, which are often unintentional, can create other problems during the employee review process. The most frequently occurring are:

- **Personal or cultural bias.**

This happens when the evaluation is based not on the entire performance cycle but rather on whether the supervisor likes or dislikes the employee. This can also happen when reviewers look at performance through the lens of their own skill set, seeing how well or how poorly an employee performs a task that they are good at or, alternatively, not good at.

- **Recency effect.** This is when the rating is determined by whatever has been accomplished within the last few months and does not take the entire performance evaluation period into consideration. This most often happens when employees ramp up their performance right around review time. Again, goal planning and setting expectations help to avoid this effect.

- **Leniency or strictness error.** This happens when employees receive a good evaluation because the supervisor feels sorry for them. This can also happen when supervisors are afraid of or uncomfortable with giving a negative evaluation. Strictness comes into play when expectations are not articulated and the rater has unrealistically high expectations. Strictness also emerges when supervisors think they must find things the employee did “wrong.”

- **Halo or horn effect.** This happens when employees are rated on one particular skill, and their strengths and weaknesses in other areas are overlooked. For example, they may be great with spreadsheets but have consistent typos and poor grammar in emails. Yet they get the highest rating because no one else is as good at spreadsheets. These errors can be positive (halo) or negative (horn).

- **Similar-to-me.** This bias occurs when a group of individuals, all with interests, skills and backgrounds similar to the

rater, are seen as highly competent and receive high ratings. This type of personal or cultural bias can be detrimental to culture because it makes the workplace less inclusive for those who are dissimilar.

360-Degree Evaluations and the CEO

Often, the idea of a 360-degree evaluation is raised to reduce rater error, but this process may pose additional challenges.

For example, who does the 360 for an association CEO? The staff? (*Forgive my editorial comment here, but please, no. With the CEO responsible for staff evaluations, how can staff complete a CEO evaluation in an unbiased manner?*) How about designated volunteer leaders? Members? Vendors? None of these parties can observe the CEO’s full performance, and so they may resort to providing a rating based on opinion. To provide truly valid feedback, they would need to know the expectations and competencies, opening the door to loss of confidentiality.

When used by professional development experts who implement a validated, industry-specific leadership assessment, 360-degree feedback can be a powerful tool. Used inappropriately, it can have devastating consequences.

To avoid pitfalls involved in CEO evaluations, it can be beneficial to engage the services of a neutral third party to work with the



No matter which style of performance evaluation a manager chooses to use, a positive and productive evaluation meeting won’t happen if there is a failure in planning and communication.”

CEO (the first party) and designated leaders (the second party). A good neutral party will separately ask the CEO and designated leaders why they think a certain way and why “XYZ” is an important goal. The third party will facilitate discussion on the priority of certain goals and help set mutual expectations.

By doing so, the third party can identify problematic areas, help each party understand the other’s view, and potentially help form trust and consensus. The facilitator/third party often will suggest language that is not threatening or demeaning. In this way, the other parties are more receptive to whatever is being said, and feelings of blame or wrongdoing are lessened.

A neutral party can also assist in clarifying the roles of the CEO and designated leaders to establish the “why” of each position. When this is done properly, the process includes why the position exists, who does what (especially what the CEO needs

to accomplish) and the required knowledge, skills and abilities for the CEO. If the goals are well written and include a timeframe, the next questions to ask and answer are who, what, where, when and why.

A Good Review?

Managing performance is an in-depth and nuanced process. While there is no perfect system, I recommend you use a process based on the three best practices of planning, communication and final evaluation. This not only helps set expectations and avoid rater bias, but also enables associations to end the year confident in a positive outcome. ●



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).



MIND OF THE MEMBER



It's All in Your Head

If you believe there's a generational issue, you're right.

BY BOB TAYLOR



hat phrase, "It's all in your head," reminds me of an observation made by Dr. Wayne Dyer: "You will see it when you believe it." Dyer wasn't talking about workplace dynamics but about goal attainment, yet his phrase is as true in the workplace as it is in your personal journey: If you

believe there is a generational issue within your association, you are correct, because you believe it to be true.

How do you know if this is what you believe? Look for statements such as:

1. "They need to pay their dues first (as in, serve in lesser capacities) before they can be considered for leadership."
2. "That's how we have always done it."
3. "They're not interested."

If this is what you or your volunteer leadership thinks or what your membership hears, that generational issue you perceive is of your own making.

While there are always generational differences, problems happen when generations compare themselves to one another. Worse is when leaders look to someone just like them as a successor, instead of figuring out who the next generation is and how to engage them.

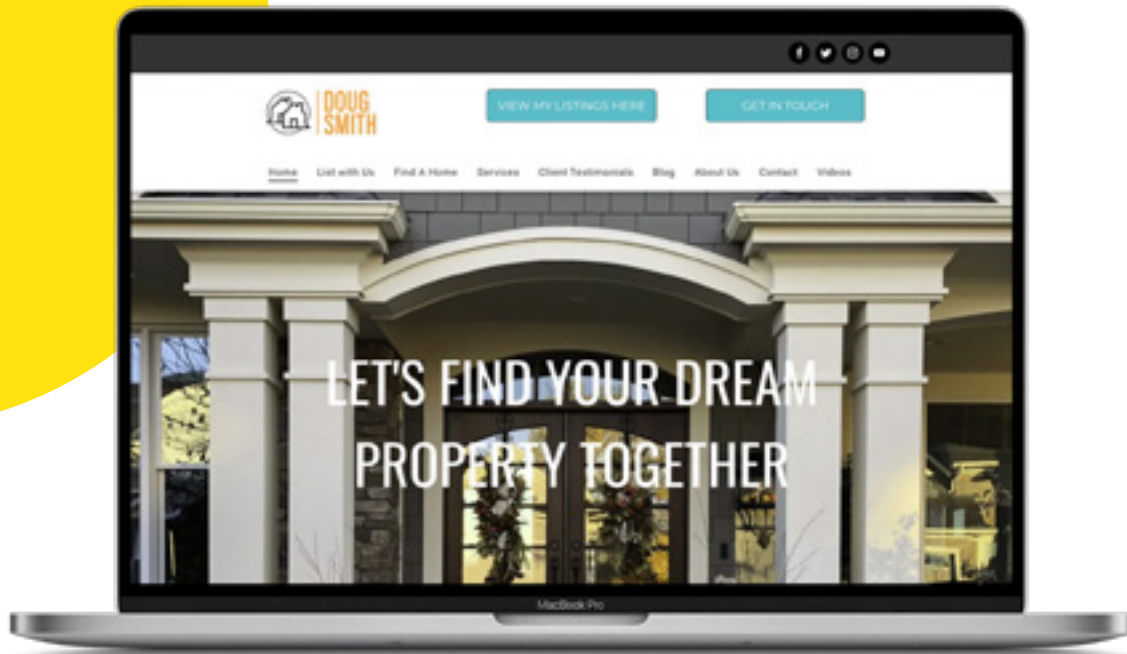
To assess how your association gets members new to the organization engaged, first think about how you engage with members generally. Are there areas of dichotomy due to the influence of generational values? Consider:

- **Education:** Does the association value the professionalism and education of its members, or does it use education as a primary source of non-dues revenue?
- **Engagement:** How do you measure engagement, and is it an objective metric?

- **Value:** Do you need MLS revenue to be in the black? If so, think hard about the value your association—not the MLS—provides.
 - **Transparency:** Is there staff/leadership availability to the membership in an unstructured environment?
 - **Meetings:** Do you value members' time by offering remote participation in governance?
 - **Structure:** When was the last time the staff and organizational structure was revamped?
 - **Goals:** How frequently are organizational documents—bylaws, policies, strategic plan—reviewed?
 - **Futurists:** How does the association stay abreast of national, state and local industry trends?
 - **Core Standards:** Is meeting this considered a chore, or is it a road map to greater member value?
 - **Appreciation:** Is the well-being and value of staff as important as that of members?
If you find that your answers to the questions above peg you as a being tied to one set of generational values, there are ways you can "mix it up" and help your staff do so as well.
1. **Establish a reverse mentorship or, as we call it, young professional adviser:** We have added a nonvoting position to our board of directors that we fill annually with someone who has caught the attention of leadership.
 2. **Encourage engagement:** Find members newer to the business who are regularly attending board activities. They may be interested in volunteering and just need encouragement.
 3. **Ask more than once:** It is said that, on average, you need to ask five times before you get a yes. "No" from a member today is not always going to be a no.
 4. **Know that timing is everything:** Great ideas can fail if implemented at the wrong time. Reject "we tried it, and it didn't work" as a final answer. Figure out if anything has changed or needs to change and try again.
 5. **Don't stop selling:** Salesmanship is simply a slight modification of these two statements by Dwight D. Eisenhower:
"Salesmanship is the art of getting someone else to do something you want done because they want to do it." and *"The supreme quality of salesmanship is unquestionable integrity."*
Finally, listen to what members say, don't say and how they say it. Also, be open to new ideas. Even if only a small part of a new idea is a good one, it can add immeasurable value and foster generational engagement. ●



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



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Always Learning

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CEO Travis Kessler

An association executive for more than 30 years and the 2009 recipient of the William R. Magel Award, Travis Kessler still says, “There is never a dull day in the REALTOR® organization.” His greatest challenge? Keeping up with industry changes. For Kessler, what has helped the most is the depth of knowledge and support from both experienced and new colleagues, which energizes him to stay current on key issues and be creative while embracing new ideas and concepts.

Q: What’s your best advice for other AEs?

Surround yourself with people who contribute and bring out the best in others to maximize good decision making. And value these long-term best practices and leadership traits: *ethos*, having the courage to always do what’s right; *pathos*, understanding the needs and expectations of others; and *logos*, making the best decision possible based on the facts and information you have at that time. The shareability of resources is what keeps our jobs rewarding.

Q: What’s changed the most over your tenure?

Broadcast delivery of information, education and services—via Zoom or other electronic/digital platforms—and a staff hybrid/remote work environment have proven to be remarkably efficient, effective and well received by association staff and members. The benefit to associations is clear: By offering improved and diverse options, we meet and exceed member expectations, creating a more robust and dynamic experience for all.

Q: During challenging market conditions and other ups and downs, how do you keep seasoned and newer staff and members engaged and optimistic?

Presenting factual information is always the best and most effective approach. But also suggest solutions—this makes all the difference in communication success. Understanding, creating and maintaining a service culture is paramount for effective association management.

Q: What’s the most effective thing you do to communicate the value of membership in Texas REALTORS®?

Using multiple communication resources to show the value of membership is paramount today, when repeat messaging is not only necessary but critical, especially with all the legal challenges in our industry.

Q: What do you learn from younger staff members—and what can they learn from their seasoned peers?

Being approachable is the key to establishing and maintaining effective business relationships—our younger staff have shown me that. They have so much they can contribute if the expectation is set that they can and should offer their insights and expertise. What seasoned staff can offer in return is institutional knowledge. History and background add tremendous value to the decision-making process. ●



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