

WINTER 2024

# AEXPERIENCE

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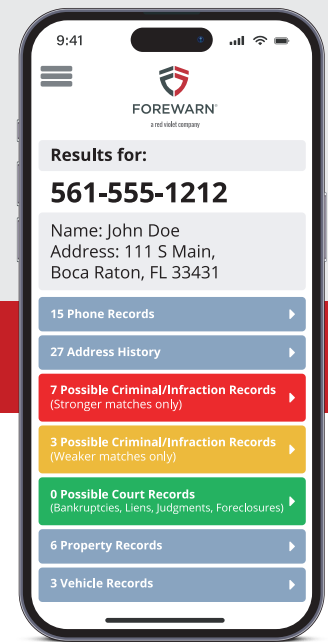
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AExperience, powered by REALTOR® Magazine, covers activities, programs, best practices, trends and ideas in REALTOR® association management.

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NATIONAL ASSOCIATION OF REALTORS® OFFICIAL PUBLICATION



WINTER 2024

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AEC CHAIR

## The Show Must Go On

**N**o matter what twists, turns and bumps happen on or off a stage, it's a given that performers have a duty to themselves, each other and the audience to give it their all.

Right now, our industry is in the second scene of a difficult show. But as association executives, we are the group that's giving it our all to keep our industry and our members together. Now more than ever, we need to rely on each other for support, some comic relief and best practices to help our members navigate changes in the market and any associated legal impacts that might change the way some of our members conduct their businesses.

The Association Executives Committee is working to support you with the tools and resources you need as the industry evolves. Keep in touch on the AEI Year-Round Facebook group. Hop online and join us for our monthly AE Chat live and monthly AEI Year-Round Virtual Sessions. Stay tuned in as the RCE Advisory Board is constantly reviewing and updating RCE materials to ensure that they are relevant to current times. And be sure to join us March 12–15 in San Diego for AE Institute as we learn and collaborate with our Canadian partners. The AEC is here for you—please share what you are experiencing, wondering or questioning. Your colleagues are here to assist.

One more resource: As our 2023 chair, Jessica Coates, discussed in the



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

last issue, the National Association of REALTORS® Culture Transformation Commission is working to ensure a safe and inclusive culture for staff and members alike. This group is composed of 25 NAR staff members, 25 staff members from local and state associations, and 25 REALTOR® members. I am honored to be working alongside many of you as part of this commission.

Our first meeting was one of the most professionally and personally challenging—but rewarding—experiences of my 18 years serving a REALTOR® organization. This commission can make a difference that will be felt at all three levels of our organization. As surveys go out to local and state members and staff, please take the time—and encourage your members to take the time—to complete the surveys. Your feedback is essential to this work. The commission is scheduled to do its work for approximately one year, and more updates will follow throughout the next few months.

In the meantime, the AEC is here for you! Let us know how we can support you. The show will go on—and working together, we look forward to watching the next scene unfold.

## AEXPERIENCE

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The AExperience editorial board reviews each issue and provides critical feedback, proposes story ideas and stays in touch with fellow association executives nationwide to scout out new programs and products to share with the AE community. To join the editorial board, write an article or contribute information, email Danielle Moores, senior editor, AExperience magazine, [danielle.moores@theYGSgroup.com](mailto:danielle.moores@theYGSgroup.com).



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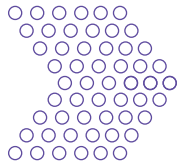
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# AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS

## SUSTAINABILITY

### Green Day

How can you keep sustainability top of mind for REALTOR® members and association staff while promoting ongoing awareness? Here are a few practical ideas from the 23 state and local associations who received National Association of REALTORS® sustainability grants of up to \$5,000 last year.

- **Chicago Association of REALTORS®** invested in a Climate Action Museum, which will engage with the public and provide awareness and education on green building. After hours, the space will also host programming, education and meetings.
- **Central Oregon Association of REALTORS®** will update its association office landscaping, using xeriscape technology to showcase water conservation. It will also incorporate a pollinator garden to promote growth of the local bee population. Local organizations and community groups are set to help develop the garden and landscaping.
- **REALTORS® of Metropolitan Pittsburgh** partnered with its local U.S. Green Building Council to tour a modular building factory where high-performance homes and light commercial buildings are fabricated. It also held a net-zero concept home presentation for members.
- **Kankakee-Iroquois-Ford Association of REALTORS®** hosted its third tire recycling drive to address waste issues affecting the community. It also added motor oil collection. “We collected 1,402 tires that day in just a little over an hour,” says Tina Franklin, C2EX, AHWD, executive officer. The grant helped improve community health, wellness and responsible environmental protection.

🗓️ NAR’s next Sustainability Grant window opens in the first quarter of 2024. For more information, visit [nar.realtor/sustainability-grant](http://nar.realtor/sustainability-grant).



Clockwise from top: A Climate Action Museum, high-performance modular homes and a tire recycling drive are among the sustainability projects supported by NAR grants to associations.

## MEMBER RETENTION

### Think Positive

It takes three positive experiences to overcome one negative one. But positive interactions don’t have to be big, just meaningful. Try some of these easy ways to maintain positive member relationships—and boost retention, too.

“Remember [members’] names! And give them thanks publicly for [their] ideas.”  
—Shawna Whorton, Four Corners REALTORS®, Neosho, Mo.

“Office visits. It makes members feel valued and appreciated.”  
—Alisha Ake, Sierra North Valley REALTORS®, Chico, Calif.

“I call every member every six to 12 months.”  
—Steve Denney, SFR, Henderson Audubon Board of REALTORS®, Henderson, Ky.

“If you have a Facebook page, spotlight things members are doing and how they’re giving back to the community.”  
—Dale P. Zahn, RCE, West Michigan Lakeshore Association of REALTORS®, Grand Haven, Mich.

“Ask [members] about their expectations of the local board. Provide them the opportunity to be heard and meet them with the resources and time that you have.”  
—David Payne, executive director, Lake of the Ozarks Board of REALTORS®, Sunrise Beach, Mo.

TOP: CHICAGO ASSOCIATION OF REALTORS®; BOTTOM LEFT: KANKAKEE-IROQUOIS-FORD ASSOCIATION OF REALTORS®; BOTTOM RIGHT: STRUCTURAL MODULAR INNOVATIONS LLC

## Support Group

Association second-in-commands join forces

Kathy Harbaugh, RCE, AHWD, wears a lot of different hats: “Right now, I’m looking into new elevators for our eight-story building.”

As chief operating officer at Indiana Association of REALTORS®, Harbaugh might review the operations of her state association’s real estate school one day or work with her controller to fund a new program the next.

COOs are a growing role at state and larger local associations, supporting association executives with tactical strategies to fulfill their visions. Several years ago, Harbaugh says, she knew only a handful. But when she and two other “seconds” decided to pull together a meeting at 2022’s AE Institute, more than 30 others joined to share information on how to do their jobs better for their members. “Not



one of us wants to reinvent the wheel,” says Harbaugh. “We all want to be efficient. Having others to gain insight from is invaluable.”

The informal group is going through a relaunch after two founding members left their association roles. If you’re interested in attending a meeting of the group at AE Institute, March 12–15 in San Diego, email [kharbaugh@indianarealtors.com](mailto:kharbaugh@indianarealtors.com). You can also join the Local and State REALTOR® Associations Second-in-Command Facebook group, [facebook.com/groups/944948096528480](https://facebook.com/groups/944948096528480).



**Help! A member brought, of all things, a tiny live monkey to a recent meeting. I’m all about animals, but it was extremely distracting—and what if it bit someone? What type of animal policy should an association have?**

Believe it or not, this was a real scenario faced by Amanda Fowler, CEO of Northwest Mississippi REALTORS® in Nesbit. After reaching out to fellow AEs on the AEI Year-Round Facebook group for ideas, Fowler says, “I reached out to our association attorney for further assistance. Using a resource provided by another AE and ChatGPT, we created a short statement to be published on all events moving forward: ‘NO PET POLICY—No animals shall be permitted on NWMR property and/or NWMR associated events without specific prior approval.’

“A longer explanation (much from ChatGPT) is available as needed. The board of directors met and approved the policy, then staff were made aware of all the information and how to handle any situation.

“We reached out to the broker and member letting them know the new policy, and the monkey has not been back! Members who were at the meeting with the animal are thankful the policy is in place; the member who brought the monkey didn’t reply.

“We love animals, we support local shelters and whatnot, but to have an animal at events or

meetings creates a huge liability and distraction from business. We hope the policy will help give us legs in the future if another issue comes up.”



AE INSTITUTE

## Tips for First-Timers

Attending AE Institute this year in San Diego, March 12–15? Get the most out of the meeting by following advice from AEs who’ve been there, done that.



**“Bring cards. Bring questions. Step out of your comfort zone and meet people. Be prepared to contribute your thoughts and ideas, and be prepared to listen to other people’s thoughts and ideas. Know you will be exhausted mentally by the last day.”**

—Lance M. Evans, RCE, EPRO, executive officer, Jefferson-Lewis Board of REALTORS® & St. Lawrence County Board of REALTORS®, Watertown, N.Y.

**“If you are in a session that isn’t a fit, get up and try a different one. It’s your time!”**

—Marti Kaiser, RCE, CAE, CEO, FM REALTORS®, Fargo, N.D.

**“Take more pictures of people than places—you will appreciate the memories.”**

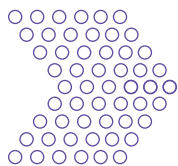
—Jo Ann Johnston, RCE, CEO, Clark County Association of REALTORS®, Vancouver, Wash.

**“Don’t bring high heels. Bring a sweater, because sometimes the rooms are cold!”**

—Donna Medina, association executive, Trinity County Association of REALTORS®, Weaverville, Calif.

**“Attend the First-Time AEI Orientation session. A few of us ‘veterans’ will provide you with hints and tips.”**

—Jim Haisler, RCE, MRE, CEO, Heartland REALTOR® Organization, Crystal Lake, Ill.



BEST PRACTICES

## Tips from a Seasoned Pro

Retiring AE shares the top five things he's learned in his career

When Steve Francks, RCE, CAE, retired last year as CEO from Washington REALTORS® after 26 years serving the REALTOR® family, AExperience wondered what words of wisdom he'd like to pass along to his fellow AEs. "There are a lot of ideas I could share, most of which I've picked up from others along the way," he says. "Here are five."

- 1 Treat your staff like grownups.** Be intentional about building a supportive, respectful and collaborative staff culture. Be willing to put your job on the line to protect them if necessary.
- 2 Understand and honor the distinctive role of volunteers.** Serving as president may be the highlight of a member's professional life, so help your presidents have a great year—within the bounds of the strategic plan. When the volunteer-staff partnership is clicking, we can achieve great things for our members and communities, and that's when the fun really starts.
- 3 Make sure your strategic plan reflects the association's direction and goals.** The president's primary job is to help advance the association's strategic plan, not pursue personal initiatives. Continually monitor the plan's progress; this holds the association and the AE accountable and helps you demonstrate your value.
- 4 Never get complacent.** Strive for a culture of continuous improvement that encourages responsible risk-taking and openness to change. Change requires courage, and remember that "the time to repair the roof is when the sun is shining" (John F. Kennedy).
- 5 Be flexible but true to your principles.** As AEs, we are constantly making choices and decisions. Do we stand on principle or encourage pragmatic compromise? We must be flexible and willing to change our minds (pro tip: listen to your staff), but we can't be perceived as feckless or wishy-washy. When making decisions, stay true to your core beliefs. This requires constant introspection, but it's indispensable to everything you do.



### Have More Tips?

We'd love to hear from you! Message Senior Editor Danielle Moores at [danielle.moores@theygsgroup.com](mailto:danielle.moores@theygsgroup.com).



WINNERS

## Theo Wins Magel Award

Wisconsin REALTORS® Association CEO Michael Theo, RCE, CAE, was named the winner of the 2023 William R. Magel Award of Excellence by the National

Association of REALTORS®. Theo, who retired at the end of 2023, will be recognized at AE Institute in San Diego in March.

## A Spotlight on the Smith Society Inductees



John Gormley



Michele Holen



Wil Riley

John Gormley, RCE, CAE, CEO, Mainstreet Organization of REALTORS®, Illinois; Michele Holen, RCE, CAE, CEO, Portland Metropolitan Association of REALTORS®, Oregon; and Wil Riley, RCE, CAE, CEO, Charleston Trident Association of REALTORS®, South Carolina, are this year's inductees into the Smith Society. Members of the Dr. Almon R. (Bud) Smith, RCE, AE Leadership Society are leading contributors to the industry and the profession.

*Hear more from this year's Smith Society inductees in "Growing an Inclusive Culture," page 20.*





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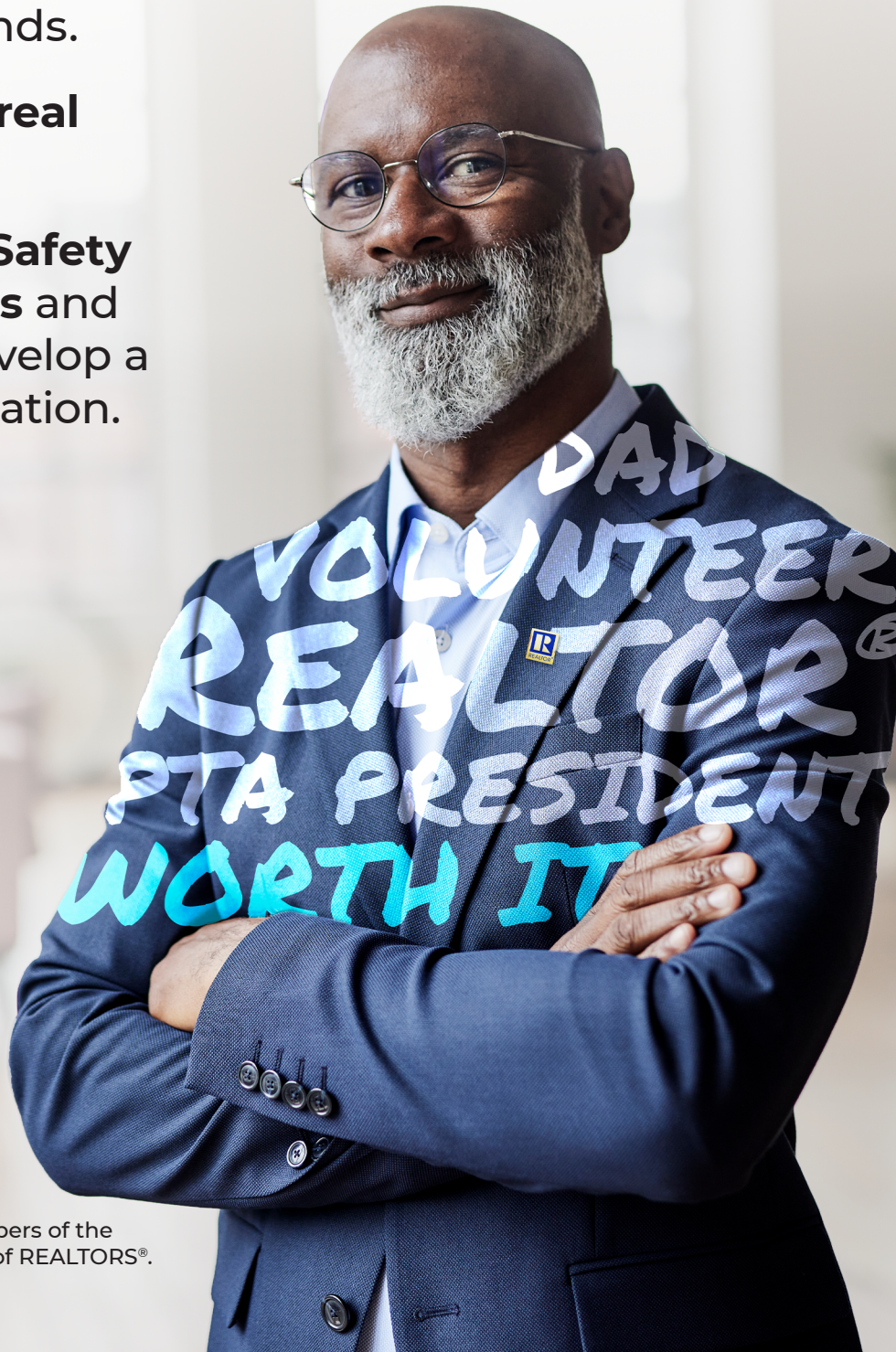


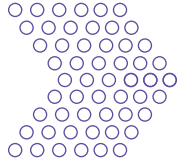
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# AOR IN ACTION

NEWS AND IDEAS FROM YOUR PEERS

## Congratulations to New RCEs



**Kaydee Albritton, RCE**  
Central Panhandle Association of REALTORS®, Fla.



**Julie Franklin, RCE**  
Greater Lansing Association of REALTORS®, Mich.



**Collin Powers, RCE**  
California Association of REALTORS®



**Kevin Besserer, RCE**  
Royal Palm Coast REALTOR® Association, Fla.



**Missy German, RCE**  
Greater Manchester/Nashua Board of REALTORS®, N.H.



**Sheri Richards, RCE**  
Saint Paul Area Association of REALTORS®, Minn.



**Maxwell Brandow, RCE**  
REALTOR® Association of Sarasota & Manatee, Fla.



**Lesli Langslet, RCE**  
Coastal Mendocino Association of REALTORS®, Calif.



**Robert Rivas, RCE**  
Pacific West Association of REALTORS®, Calif.



**Josh Branum, RCE**  
Greater Chattanooga REALTORS®, Tenn.



**Craig Lewis, RCE**  
Orlando Regional REALTOR® Association, Fla.



**Jesse Sunday, RCE**  
REALTOR® Association of Sarasota & Manatee, Fla.



**Heather Cook, RCE**  
Lakeland REALTORS®, Fla.



**Wendy Lopez, RCE**  
Rancho Southeast REALTORS®, Calif.



**Kandy Sweeney, RCE**  
Marco Island Area Association of REALTORS®, Fla.



**Dirissy Doan, RCE**  
Orange County REALTORS®, Calif.



**Darcie McLachlan, RCE**  
Chautauqua-Cattaraugus Board of REALTORS®, N.Y.



**Kyle Tetzlaff, RCE**  
Kentucky REALTORS®



**Dan Douglas, RCE**  
Dayton REALTORS®, Ohio



**Ashton Musgrove, RCE**  
Florida Realtors®



**Douglas Tomson, RCE**  
New Jersey REALTORS®



**Mark Fisher, RCE**  
Indiana Association of REALTORS®



**Mary Pope, RCE**  
Atlanta REALTORS® Association, Ga.



**Nikki Vasquez, RCE**  
South Bay Association of REALTORS®, Calif.



EDUCATION

## Grow Your Community *and* Your Expertise

**AEs, REALTORS® explore new planning and zoning elective course.**

Association executives and REALTOR® leaders have a new opportunity to expand their expertise and be active participants in resilient community planning and advocacy for smart growth. The Center for REALTOR® Development’s Planning and Zoning Certificate course, an Accredited Buyer’s Representative elective course, provides AEs and members with actionable ways that they can help local stakeholders understand the economic, environmental and housing aspects of effective land development.

The certificate course empowers attendees to effect positive change while gaining a competitive business advantage. Learning objectives include:

- Understanding how planning, zoning and smart growth benefit your community and your business.
- Identifying key components and stakeholders of the comprehensive planning process and how they play a role in community development.
- Summarizing how zoning has evolved and how this history has discriminated against and negatively impacted histori-

cally marginalized communities.

- Explaining how smart growth is changing the way real estate professionals approach business and how it will help meet the changing demands of home buyers and sellers.
- Discussing ways that you can implement smart growth principles in your town to enhance the community and build your business.

You can offer this course locally by connecting with a CRD-licensed provider. You may be able to underwrite the cost with a Smart Growth Grant in the Level 1 category for up to \$3,000. The National Association of REALTORS® Community Outreach program, which supports state and local associations’ smart growth initiatives, opened for applications Jan. 2, 2024.

[abr.realtor/abr-course-and-electives/electives](https://abr.realtor/abr-course-and-electives/electives)

[realtorparty.realtor/community-outreach](https://realtorparty.realtor/community-outreach)



**Zack Wahlquist, RCE, CAE**  
Chicago REALTORS®, Ill.



**Christina Wereski, RCE, CAE**  
Chicago REALTORS®, Ill.



**Bonnie White, RCE**  
Johnston County Association of REALTORS®, N.C.



**Lindsay Wright, RCE**  
Greater Texoma Association of REALTORS®, Texas



**Ayca Yavuz, RCE**  
REALTOR®  
Association of Pioneer Valley, Mass.

## Grow Your Community Outreach With Grants

Want to write a more compelling grant application? Sign up for a Community Outreach Planning Session to get a one-on-one virtual overview of critical steps for developing ideas and standing out from the crowd.

NAR’s Community Outreach program offers state and local REALTOR® associations five different grants to match their objectives in the categories of housing opportunity, smart growth, placemaking, rural outreach and fair housing.

Level 1 grants support trainings, speakers or stakeholder meetings (up to \$3,000); Level 2 grants support partnership-led policy forums, ordinance development, visioning sessions and studies (up to \$7,500); and Level 3 grants support comprehensive policy and program initiatives leading to long-term impact (up to \$15,000). Each association can receive one grant per level each year, and grant applications are available online (login required).

[realtorparty.realtor/community-outreach-planning-sessions](https://realtorparty.realtor/community-outreach-planning-sessions)

# WHY ARE YOU AN AE?

Association executives share the inspiring, challenging and laugh-out-loud stories of what it's really like to lead a REALTOR® association.

BY DANIELLE WONG MOORES

**I** don't think anyone dreams about or plans to become a REALTOR® association executive," says Sarah Rayne, RCE, CAE, CEO at the Howard County Association of REALTORS®, Columbia, Md. But for Rayne and others, it's a position that has become a perfect fit.

"The AE role is perfect for me," says Lauri Rottmayer, EPRO, AHWD, AE at the North Central Board of REALTORS®, Mountain Home, Ark. "I love going 20 directions at once and helping people. I also love the AE community. This is truly the toughest job I've ever loved."

AExperience spoke to Rayne, Rottmayer and several other AEs about why they chose this role, their greatest challenges and—yes—the laugh-out-loud stories that are part of the day-to-day business of leading a REALTOR® association.

## Why did you decide to become an AE?

**Kim Cox:** After my husband and I packed up our three teenage daughters and moved from California to Missouri to start a new adventure and be closer to family, my mother introduced me to an agent friend to help us find a house. After the closing, the agent asked us if we would be looking for work. We both said yes—

my husband was in sales, and I was looking for an administrative position. He told me that his local "board office" was hiring. After about 20 minutes, I got a call from the AE [of the Ozark Gateway Association of REALTORS®]. Long story short, she interviewed me that Friday, and I started on Monday. After I had worked nine years in education and MLS, my [former] AE retired, and the board of directors asked me to step into the AE position. It's been almost 20 years since that conversation with our agent. So thankful to have met him!

**Rayne:** I was a political newspaper reporter when I stumbled across a government affairs director position at an association. The print news industry is tough, so I literally had nothing to lose. I ended up loving the work and wanted to see where it would take me. I'm proud of myself for where I've ended up, and I'm grateful to the REALTOR® family for the opportunity.

**Allison Woodham:** I worked at my local newspaper for three years and had hit a lull in enjoying what I was covering every day. A friend of mine sent me the job description for the then-communications/events director at my association, and I went in just to see what it was about, honestly not expecting much.

Two hours later, I left with a job offer. My then-AE said she'd never offered someone a job during their first interview.

That same day, the women at the newspaper took a group photo for a women's appreciation special publication. Three months later, I was at strategic planning with my association, and on the console table was a publication with that photo on it staring back at me—full circle moment!

**Marlene S. Merkle:** In 1982, I applied for the AE position in Venice [Fla.] along with a couple of other opportunities. I was offered another job but decided to take the AE position instead. It was almost exactly what I did in my previous role as a director of volunteer services at a hospital: working with volunteers, budgeting, fundraising, public speaking, written and oral communication skills. I also have a bachelor's degree in sociology, a minor in psychology and a master's in counseling—I have used these skills a lot in working with members and the public.

The funny thing is that when I took the position, I had no idea that being a REALTOR® was different than being a licensed real estate agent. This is such a common misconception within the public. I am happy to say I quickly learned the difference.



### Share a memory or situation you think back on where you tell yourself, “This is why I’m an AE.”

**Michelle Pointer:** That would have to be when my members in Marshall, Mo., packed the city council meeting during which council members were trying to pass an ordinance that was not good for our home sellers or buyers: requiring a city inspection and additional conditions for transfer of ownership following a third-party inspection. The presence in that room was impressive, and the council thought so, too. Then I filed for the Transforming Neighborhoods grant for \$20,000 to help the city with the issue of maintenance of occupied dwellings. That was the first time I had seen the powers that be and REALTORS® working together for the greater good of American homeownership.

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**My members packed the city council meeting during which council members were trying to pass an ordinance that was not good for our home sellers or buyers. ... The presence in that room was impressive, and the council thought so, too.**

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**Cox:** I once had a really frustrated member come into my office to talk through a scenario she was facing. The agent was consumed by self-doubt and frustration but clearly wanted to do right by her clients. It almost seemed like she just needed someone to hear her out and really listen. We talked about some of the rules and regulations that applied to her situation, forms that she’d need to ask her broker about, and the Code of Ethics. At the end of the conversation, it seemed like she just needed a reminder that “the right way to do things” is what truly separates REALTORS® from the rest and that she needed to wear [her credentials] like a badge of honor. The agent thanked me for always being a resource and avid supporter and for sharing my time.

**Rayne:** Mentoring my staff is my favorite part of this job. Whenever I support them in accomplishing something big and I see how proud they are of themselves, I remember why I’m an AE.

**Rottmayer:** I’m newly returned to my role as AE. I left to be a real estate agent, something I always wanted to do because my dad was in the business. It wasn’t for me, and I missed my AE job every day. I was so happy when it became available again and I was able to be back where I belong.

**Woodham:** I have a folder in my email titled “Feel Goods,” and it’s full of “good jobs,” words of wisdom or something funny I’ve received from a member or staff. Anytime I’m having a bad day, a quick scroll through those not only brightens my mood but reminds me why I do what I do.

### What’s one of the toughest challenges you’ve had to face as an AE—and how did you turn that negative into a positive?

**Cox:** About 12 years ago, our area was hit with a natural disaster. We had to absolutely scramble to get a plan together to assist our members and community. It took months to learn what we should have done, could have done better and would have done if only we had known. Since then, we have created a disaster plan and feel way more prepared should something happen again in the future. *(Read more on Cox’s experience at [nar.realtor/aex/disaster-what-i-learned](http://nar.realtor/aex/disaster-what-i-learned).)*

**Pointer:** One of the toughest for me is getting members to read my emails. How do you turn that negative into a positive? I found out I was sending too many emails, and the members weren’t reading any of the messages. I now send a newsletter once a month—with enough information to choke a horse—and I send one final notice about meetings. I tell every new member, “If you get an email from me, *open it*. I don’t send you any email that isn’t important.” I now have an average 67% open rate on all my emails.

**Rayne:** Navigating the different personalities, backgrounds, experiences and beliefs of my board members is the biggest challenge in my job, but I try to learn and grow every day, and I lean on my fellow AEs and the amazing staff at the National Association of REALTORS® to help me work through any difficult situations.

### What’s one of the funniest situations you’ve dealt with as an AE?

**Rayne:** When I was a government affairs director at my last association, I accidentally left a REALTOR® on an island! We’d gotten a placemaking grant to build a pocket park on Smith Island, which is in the middle of the Chesapeake Bay and is accessible only by boat. On build day, we were loading up the boat to head back to the mainland, and I noticed one of our members was missing. But someone told me he was in the boat restroom, so I gave the captain the green light to head out. About halfway back, we got a call on the radio letting us know that we’d left someone behind. The captain said he could not turn around, but the REALTOR®

## The AEs



**Michelle Pointer**  
Association Executive  
Central Missouri Board  
of REALTORS®  
Marshall, Mo.



**Sarah Rayne, RCE, CAE**  
CEO  
Howard County Association  
of REALTORS®  
Columbia, Md.



**Lauri Rottmayer, EPRO,  
AHWD**  
Association Executive  
North Central Board of  
REALTORS®  
Mountain Home, Ark.



**Kim Cox, GRI**  
CEO  
Ozark Gateway Association  
of REALTORS®  
Joplin, Mo.



**Marlene S. Merkle,  
M.A.**  
CEO  
Venice Area Board of  
REALTORS®  
Venice, Fla.



**Allison Woodham, RCE**  
Education Director  
Baldwin REALTORS®  
Robertsdale, Ala.

was going to catch a ride back on a fishing boat. I was horrified. Luckily, the member was cool about it, but he made fun of me for years.

**Merkle:** Probably one of the funniest situations was when my president was sitting across from me at my desk, and I stood up when he was leaving. I inadvertently bumped my large desk calendar, and it knocked his coffee all over his pants. Maybe not so funny, but I was in such shock I had to laugh!

**Cox:** As an AE, we wear a lot of hats, and we always want to do whatever we can to help. One day, many moons ago, my membership director was out for the day, and I needed to help process a new agent, as well as help him upload his photo to the MLS. The new agent came into my office and handed me a flash drive for me to open and pull up his photo. As I was clicking away on the drives, a photo of a cat popped up on my screen, and I practically squealed, “Oh my goodness! Your cat looks *just* like my cat!” As I swiveled around in my chair to point at a picture of my cat on the wall, he politely said, “Ummm ... that *is* your cat; you clicked on the wrong drive.”

### What's a piece of advice or life lesson you'd like to share with other AEs, and how did you come upon that advice or life lesson?

**Cox:** My life lesson, at home and in my association, is to make sure to always hear from everyone in the room when it comes to important discussions. Oftentimes you will sit in a meeting and only a few of the more vocal people will be heard from on any given topic—when in reality, we are only going to grow and learn if we hear from all parties. Just because someone might be more shy or introverted doesn't mean they don't have something to say. As a matter of fact, they usually have plenty to say, and many times I can remember someone making a real difference in our plans

after we made an effort to hear from the entire room. You'll be surprised at the conversation that kicks up when hearing from a variety of personalities in a room.

**Rayne:** If you don't feel appreciated, look for validation within yourself. We all love working with REALTORS®, but we also do this job for our own personal and professional growth, which we can be proud of no matter how others may make us feel.

**Pointer:** I haven't been an AE as long as most, but I have learned not to schedule anything in July. We are a small board, so I can pretty much work wherever my laptop is for a short time, but it took me about 10 years to realize that most members take vacation in July. We don't have a general membership meeting that month (due to lack of attendance), no RPAC events, no committee meetings, nothing if it can be helped. I now use that month to get caught up on anything and everything!

**Merkle:** As far as pieces of advice are concerned, I have a lot of those, some geared toward new AEs. In fact, I did a brief program last year at the Florida Realtors® AE Workshop, offering these tips:

- Sit back and listen before you act, and get to know the key players, especially in a new job role.
- Seek out an intermediary to help with conflict resolution.
- Let your volunteers and staff members take the public credit; don't put yourself in the photo op.
- Always mind your manners, especially at social events.
- Keep personal information personal.
- Don't try to cover up a mistake; own it and fix it.
- Be humble. ●

*Danielle Wong Moores is the senior editor of AExperience.*

## The Key to Stronger Associations?

# TEAM-BUILDING

Whether it's a simple lunch meeting or an evening of mechanical bull-riding, association executives are nurturing connections among staff and their fellow associations.

BY TINA NAZERIAN

Sometimes, when Ryan McLaughlin and his team at the Northern Virginia Association of REALTORS® are at work, they're actually not.

That's because McLaughlin, RCE, CAE, the association's CEO, plans deliberate "offsites" that aren't just for learning and strategic planning, although those are some of the objectives. They're also an opportunity for team members to connect with each other through meals, a fun activity (recently, it was a wine and painting session) and simple, spontaneous moments. In addition to the annual offsites, he also organizes team activities, such as a mini golf night a few months ago where staff members brought their family members along, and training sessions where staff receive professional development.

"We can kind of unplug a little bit and refocus on each other and the organization," McLaughlin says.

While navigating through all the usual challenges of association leadership and confronting the cultural and legal challenges facing the industry, it's crucial to find time to prioritize team building at work. That's the core of McLaughlin's approach, he says, to the point where the acronym TEAM comprises NVAR's corporate values: T stands for team player, E for excellence, A for ambitious and M for motivated. "We try to live that in everything that we do," he says.

Importantly, team-building activities remove "silos that might exist or could potentially build up," McLaughlin says, and give staff a "stronger sense of organizational ownership." Team members know who they are as people, take initiative, understand how they fit into the bigger picture of the association and support each other's successes.









From left: NVAR staff and family at mini-golf; Jim Haisler with his team at Heartland REALTOR® Organization; games at a Texas REALTORS® staff holiday party.



## No Association Is the Same

Terrie Suit, RCE, CAE, CEO of Virginia REALTORS®, oversees a 38-person staff that works remotely most of the time. What has worked for her is open communication—particularly cross-functional communication—through virtual means. But like McLaughlin, Suit gathers team members in person on projects, and the association organizes regular, in-person touchpoints throughout the year at set times. This includes summer cookouts, a holiday lunch and twice-yearly “staff morale events,” where staff members drive in from across the state to bond over a fun activity.

“We’ve done Topgolf,” she says. “We’ve rented out an arcade twice. We did a river cruise one year.”

John Sebree, RCE, CEO of the California Association of REALTORS®, faces a different challenge. “With 150 staff members, it is not easy to have a lot of quality one-on-one time with everyone,” he says. “But they have access to my calendar and can schedule lunches and quick meetings.”

For senior staff members, Sebree hosts a monthly offsite meeting. “We spend an entire day together,” he says. “This has really been successful as it allows us to concentrate on many issues in one day with no interruptions. And we have a good meal or two together at the same time.”

Travis Kessler, RCE, CAE, the president and CEO of Texas REALTORS®—which has a staff of 78—agrees on the value of a good meal to facilitate team building. Lunch and learns are one example, where staff members may receive training or updates from different departments at the association. But there are other activities as well, such as happy hours, regular socials and seasonal activities, to help everyone “get to know each other a little bit better,” says Kessler. “We bring in snacks, food, drinks and games that we play in groups to further enhance working together.”

Some noteworthy fun activities featured at previous events? Bowling, ring toss and, in true Texas style, riding a mechanical bull.

Roughly 50 miles northwest of Chicago, Jim Haisler, RCE, MRE, the CEO of the Heartland REALTOR® Organization, is on the other end of the size spectrum. Including himself, his association has just four staff members. He prioritizes

creating an inclusive environment by “finding commonality” through activities that staff enjoy.

When it comes to selecting events, Haisler’s team members have a say. For instance, when the board of directors gave Haisler a Ticketmaster gift card for AE Appreciation Day on Sept. 28, he encouraged his staff to find a show so they could all go together.

“I really feel that’s important for us, just to recognize each other as humans,” he says. “When you work closely together and spend a lot of time together as a group, it’s always business, business, business, and sometimes you get some friction.”

Haisler also recognizes the value of giving people time and space to clear their minds. One staff member who enjoys going on walks carves out 15- to 20-minute breaks each workday. Haisler also hosts twice-a-month meditation sessions on Zoom for staff and other association executives.

Ultimately, though, an association doesn’t have “unlimited funds” for team-building activities, he says, so he finds other ways to form a work environment people want to stay in. Flexibility and the option to work remotely are two ways he does so.

“It goes a long way with people in general, that flexibility—that appreciation for who they are as a person,” Haisler says.

## Building Bonds With Local Associations

In addition to supporting their staff, state association AEs also focus on supporting and building relationships with their local associations.

“We’re all independent associations, but the point of entry to all three levels is the local association,” says Suit, who, as CEO at Virginia REALTORS®, serves 28 local associations. “That’s where the members have the most engagement. So, as a state association, what we try to do is really support our local associations and help them be as successful as possible.”

Her staff regularly meets with locals to give talks and provide advice and insight, and Suit works to promote a sense of teamwork among the local AEs through biannual “peer-to-peer” retreats. “Probably the most value during our retreats is the time for the AEs to all get to know each other and to develop camaraderie and relationships—really a support system of other peers,” Suit says.

In California, Sebree leads a state with many local associations—99, to be exact. And he has made it his goal to visit every single



one. He's been in his role since February 2022, having joined after a long stint as the CEO of Missouri REALTORS®. While he hasn't yet visited all 99, he's well on his way.

"That means a lot of time on the road, but I think it's important because they want to know me, and it's the best way for me to get to know the members and the issues that are impacting them," Sebree says.

As part of his outreach, he may help an association with strategic planning or participate on a panel. While the state association hosts an annual retreat for local AEs, Sebree hosts an additional three business meetings yearly, where he has a small dinner with several local AEs.

"It's a great way for me to have one-on-one time with a smaller group of association executives, and it's a different group each time," says Sebree. A staff member ensures that each meeting includes a mix of new and seasoned AEs representing large, medium and small associations.

Kessler explains that he and other Texas leaders work together to build "a collaborative, synergy-based team." Notably, every year, the state association holds a two-day leadership summit in Austin for local board presidents and local AEs.

For the state's 72 local associations, the state association offers one-day strategic planning sessions at no cost. Kessler emphasizes that the offer is completely optional and done upon request. His team conducts roughly 15 to 18 local board strategic sessions annually, helping put the state and local associations on a "common path" with shared strategic plans.

"It helps us tie in the benefits of the state association, but it also gives us the opportunity to hear what the issues and trends are at the local level," Kessler says.

Ultimately, that's Sebree's best advice: Listen to what local AEs have to say. "Hear what their pain points are," he says. "If one association is having that pain, it's likely others are having similar pain, and there may be a state solution."

Sebree also advises AEs not to be "afraid to shake things up." If local associations are having issues, he says, it could be because the state association needs to make an "easy tweak" to a complicated process, such as reimbursement.

Sebree's last piece of advice is one that applies both to team building with local associations and with association staff: the



## Try Improv for a Fun Team Building Activity

Association executives looking to build stronger bonds among their staff might try comedy.

Improv comedy, specifically, is great for team building because of the spontaneity it facilitates. That spontaneity, in turn, bolsters communications skills, according to Nancy Howland Walker, the executive director of Chicago Improv Associates, a company that's been offering improv training to businesses for more than three decades.

"It requires soft skills that are essential for any team," she says. In addition to communication skills, that includes creativity, trust, acceptance, being present, embracing mistakes, flexibility, commitment, and the ability to give and take control. "Improv is a highly effective approach to learning these skills because it's fun and playful, which is the best way to learn," she says.

AEs who want to sign up their teams for improv workshops should do their due diligence, Howland Walker urges. "I highly recommend making sure that [the trainers] have been actually performing improv for at least five to 10 years," she says.

"Improv is made up on the spot from audience suggestions," Howland Walker explains, meaning the people involved must work together to create comedic scenes right then and there.

There are three keys to successfully leveraging improv for team building, she notes. First, team members need to learn to say, "Yes and ...?"

"This simply means that they accept whatever is said or done on stage as reality and then add to it in some way," says Howland Walker. "If you start a scene by saying, 'Let's build a robot!' and I say, 'No,' then boom! The scene stops dead."

Next, she says, team members must learn how to be present—if they worry about what just occurred instead of what is currently occurring, they'll lose track of what's going on, and ultimately, the "scene suffers."

Finally, she stresses the importance of teaching team members to "embrace mistakes."

"No matter what someone says or does in an improv scene, it's a wonderful gift," Howland Walker says. "Even the worst mistake can take you in amazing directions."

importance of meeting people on their "home turf. You get to see what they're experiencing every day," he says. ●

*Tina Nazerian is a writer based in Houston, whose work has appeared in various publications including Mobility, ASJA Magazine and Literacy Today.*



# Growing an Inclusive Culture



## Associations are doing the hard work to ensure their cultures promote a safe environment for both staff and members.

BY M. DIANE MCCORMICK

**F**or the past several years, REALTOR® associations have been taking an active role in creating welcoming cultures, moving diversity, equity and inclusion and personal safety out of the pages of strategic plans and into the workplace and gatherings. By breathing new life into listening sessions and giving members a voice, leaders continue to influence and inspire cultural growth.

“We have gone through some seismic shifts in society that have affected our organization,” says John Gormley, RCE, CAE, CEO of Mainstreet Organization of REALTORS® in Downers Grove, Ill. “In the last few years, we have learned a lot. We have made a lot of changes in our priorities and have grown because of it. Or maybe despite the challenges, we’ve been able to grow, not only in terms of our membership, but in terms of how we look at our culture [within our association].”

### Acting on Policy

In summer 2023, Portland Metropolitan Association of REALTORS® CEO Michele Holen, RCE, CAE, convened staff to air concerns and acknowledge sexual harassment in the industry. Realizing that acknowledgement and action were needed, she received full support from PMAR President Tony Kelly for a statement issued to reassure staff, members and leadership that policies were in place and under review.

Intentionally using the term “harassment” to envelop any kind of unacceptable behavior, whether sexual harassment or discrimination, the statement expressed PMAR’s commitment “to creating an inclusive environment that is free from discrimination and harassment and having protocols in place to deter and detect inappropriate conduct.”

As the statement promised, Holen directed legal counsel to review PMAR’s harassment, social media and whistleblower policies for timeliness and compliance with state law. “We wanted to make sure that those policies and procedures were in place, everybody understood them, and everybody was committed to them,” Holen says. “If something were to happen to you or you witness something, you can feel empowered to recognize it and identify it, report it and expect action by our leadership.”

Policies should be reviewed every three to four years, says Holen. This latest round clarified verbiage in PMAR’s social media policy to avoid infringing on individual expression while continuing to regulate staff conduct that could reflect on the

organization. PMAR's reporting procedures, which include alternatives in case the complaint is against leadership, didn't change but were aired among staff and board members to raise awareness of their existence and the procedures to follow in case of possible violations. More importantly, the dialogues among staff members and leadership brought the issue of harassment forward, dusting off the policies that people sign and raising the comfort level around discussing them.

"I don't think there were any changes in who [should report an incident] or how [to report one]," says Holen. "It's just making sure everybody knew who and how."

### Ensuring Core Values 'Live and Breathe'

When it comes to creating a welcoming, safe and inclusive culture, Mainstreet Organization of REALTORS® intentionally didn't hire a diversity officer; rather, it seeded diversity and inclusion throughout the organizational structure. The pillars of Mainstreet's new strategic plan stand for PLACE—Promote, Lead, Advocate, Community, Educate—and they "don't just live in the DE&I Committee," says Gormley. "They live and breathe throughout the organization."

Cross-pollination among Mainstreet committees is helping seed that initiative. The DE&I Committee recently led a training segment for the Professional Standards Committee to raise awareness of potential cultural differences and unintended bias. Putting discussions of DEI and organizational culture on agendas helps build "a more open and welcoming culture for everyone over time," Gormley says. "People tell their stories. You don't have to talk if you don't want to, but other people are telling their stories, so that creates a safe space."

Enforcement also makes policies tangible and instills safety. At Mainstreet, one former member's repeated harassment of staff compelled Gormley to consult an attorney and get a restraining order. "It's not a decision taken lightly," he says. "Real estate can feel like life and death for some people. I get that, but it's not worth intimidating or bullying anyone or making someone feel unsafe, whether it's a member or staff. We're just fortunate we have the leadership here that doesn't waver on that."

While Mainstreet's new strategic planning doesn't change its pillars, the mission, vision and values are no longer stuffy and opaque.

They now express expectations in unmistakable terms. One states, "We always do the right thing, no matter what."

"Another core value is, 'We're really, really nice,'" says Gormley. "That's actually a core value."

### Listen and Learn

At Charleston Trident Association of REALTORS® in South Carolina, one of its key values on the road to culture change is listening. CTAR Director of Inclusion Kravonda Forrest-Simmons solicits member suggestions for DEI committee informational sessions and encourages members to bring guests, which helps grow the committee roster and constantly refresh the ideas and perspectives it considers. She also engages leadership in anti-bias training that focuses on spotting and engaging with potential leaders.

"I would say we do a lot of listening, and listening allows us to fulfill our members' expressed needs," says Forrest-Simmons. "When members see their requests and suggestions being fulfilled, they are more willing to participate because they understand that when they communicate needs, we will deliver."

CTAR CEO Wil Riley, RCE, CAE, agrees. He and his team are intentional about extending invitations and bringing new voices into conversations. "I'm stepping into rooms I would not have gone into in the past in order to break the ice,

extend a hand and encourage people to come and be part of what we're doing," Riley says.

CTAR's new Pathways to Leadership document is one of its most significant initiatives, adds Riley. The simple document condenses 10 pages of thought into a single page that lists a diversity of experiences such as military and community service—hence, attracting a diversity of people to association leadership. "This isn't just about differences in color or nationality," says Forrest-Simmons. "It's more so diversity in education, experience and service."

Adds CTAR Vice President of Communications Meghan Byrnes Weinreich: "We haven't just invited people for the sake of inviting them. We make them understand that their opinion is important, that they're a valuable part of the association."

### Safe Spaces, Without Question

With policies in place and a commitment to core values, the demonstrated action of volunteer leaders can elevate "safe space" from concept to impact, says Nicola Esposito, an agent with Gilsenan & Co., Ridgewood, N.J., and vice president, Greater Bergen Association of REALTORS®.

"If you're able to allow someone to speak and they feel heard, other people will recognize that this is a safe space to speak, and also a safe space where they're not going to be ousted



PMAR made its support of two local affinity groups official by signing a memorandum of understanding with Oregon Realtists, NAREB and AREAA Portland. Each will receive \$5,000 in annual support from PMAR.



Mainstreet doesn't have a DE&I officer, but is seeding a welcoming, safe and inclusive culture throughout its organization.

or ridiculed," he says. "It's a space where we can promulgate ideas."

During the REALTORS® Excelling in Association Leadership course, Esposito—who was also accepted into NAR's Leadership Academy in 2022—learned how to engage people "according to their ways." So, for example, if a member regularly attends meetings but doesn't speak, leaders can solicit that person's input afterward and show that they value the member's opinion.

"Some people are introverts," he says. "They don't want to talk at a meeting. They don't feel comfortable. It's important to figure out how to engage members to speak comfortably, whether in a meeting in front of everybody or one on one."

Esposito also believes in holding others accountable for misbehavior or insensitive comments. "If something goes wrong, you have to approach that person who's maybe not handling the situation in the right way," he says. "You have to pull them aside to say, 'That might not have been the right way to do things. I understand your intentions are good, but we have to pull this back, because maybe the person you're speaking to in that manner doesn't like to be spoken to that way.'"

When PMAR realized it had no code of conduct for meetings, Holen received permission from her local chamber of commerce to adapt its code for the association. Like the chamber, PMAR requires that registrants click to acknowledge their willingness to abide. That extra layer of safety puts boundaries on nonmembers as well as members.

"You can't control everything, but at least you can control the fact that we have policies in place," says Holen. "We can now take action if they don't abide by them."

Soon, CTAR's board is expected to approve an internally drafted association anti-harassment policy and code of conduct for meetings, Riley adds.

### It Takes Commitment

As PMAR was reviewing its policies on harassment, PMAR's president kept association leaders informed at every step. "Leadership was working hand in hand with us to make sure that everybody felt safe, protected and able to take action," Holen says.

Board members and committee chairs are now expressing their commitment to PMAR's harassment and whistleblower policies, signing them annually just as they have signed the association's conflict of interest and social media policies before beginning their terms. The topic of harassment will also be added to annual board training. As Holen vets facilitators for those January sessions, the ability to lead such discussions will be on her checklist of qualifications.

At the staff level, PMAR is now highlighting its anti-harassment policies during annual staff training to give them more stickiness, beyond simply requiring a signature.

"It's just bringing it to the forefront, acknowledging that this can be a problem, and acknowledging our responsibility to keep people safe and to have an inclusive envi-

ronment that's harassment-free," says Holen. "I think we have created some confidence among the staff that leadership has their best interests in mind and cares about their safety and well-being."

Since coming to CTAR in 2013, Riley has avoided micromanaging and, instead, empowers staff members to do their jobs. His open-door policy creates a safe space where staff can share any concerns. Extensive policies also empower staff to bring any concerns directly to him or, if the complaints concern him, directly to the CTAR president. "We have an inclusive culture with our staff, and it's not words, it's action," says Weinreich. "That's why we've been successful in implementing new initiatives with both staff and members. We always walk the walk."

As they do the hard work to transform their cultures, association executives and leaders are seeing spinoff benefits in renewed energy and organizational vigor.

"We are learning, and our members are constantly learning," says CTAR's Forrest-Simmons. "We encourage members to respect perspectives and celebrate differences. You don't have to agree. It's fine to not agree, but respect someone else's perspective, because that perspective is coming from experience. It is coming from social norms, from things that have taken place in their lives. We have learned, and we are teaching to respect perspectives." ●

*M. Diane McCormick is a Pennsylvania-based freelance writer and author.*



## It's About Respect

These nine best practices can help prevent and address workplace harassment and discrimination. **BY LESLEY MUCHOW**



Workplace harassment and discrimination can have significant impact on any organization's culture, morale and overall productivity. Association executives can get out in front of these complex issues by implementing policies and regular training and by maintaining an ongoing dialogue about expectations and appropriate conduct. Failure to mitigate and properly address misconduct can result in legal liability—leading not only to costly litigation and reputational damage but also harm to your staff and culture. Follow these best practices to create a respectful and inclusive workplace environment.

**1. Create a comprehensive anti-harassment policy.** A robust anti-harassment and antidiscrimination policy should be at the core of every organization. Membership organizations such as REALTOR® associations should have policies for both staff and member conduct. As with the National Association of REALTORS® Member Code of Conduct, the policy should clearly define what constitutes harassment and discrimination, explain reporting procedures, and outline consequences for violations. In addition, the policy should make clear that retaliation for making a complaint of discrimination or harassment will never be tolerated.

**2. Provide regular training.** Regular training sessions help staff and management understand what harassment and discrimination look like and how to prevent both. Training should be tailored to management and non-management staff within the organization and should focus on real-world scenarios that incorporate examples of various types of harassment, discrimination and retaliation.

**3. Establish clear reporting channels.** Staffers need to know how to report harassment or discrimination without fear of retaliation. AEs can build trust in the process, by dedicating personnel for handling complaints, opening multiple avenues to report issues and ensuring supervisors understand their roles and responsibilities when it comes to reporting misconduct.

As an example, the NAR Member Code of Conduct makes it clear that all complaints of discrimination, harassment, retaliation or any other inappropriate conduct must be reported to one of the following: NAR's general counsel, senior vice president of talent development resources or CEO. Clear direction on how to report misconduct ensures that any incident will be properly addressed.

**4. Promote a culture of respect and inclusion.** A respectful workplace is less likely to foster harassment and discrimination. Associations should actively promote diversity, equity and inclusion by encouraging collaboration, open communication and the sharing of diverse perspectives. These values are reiterated throughout NAR policies, including its Statement of Appropriate Event Conduct.

**5. Implement swift and appropriate action.** Once a complaint is made, it must be handled promptly and impartially. Moreover, all complaints must be taken seriously. If reasonable, a designated investigation team should be appointed to ensure fairness and thoroughness. This team could include human resource professionals, in-house counsel or an outside investigator or outside counsel. Action taken must reflect the seriousness of the offense and be consistent with association policy or the code of conduct.

**6. Monitor the workplace environment.** Regular surveys and informal check-ins can help monitor the effectiveness of anti-harassment measures and reveal areas for improvement. By keeping a finger on the pulse of the association's culture, AEs can identify and address potential issues.

**7. Engage leadership.** Leadership commitment is essential in setting the tone

and example for appropriate behavior. AEs and managers must consistently model respectful behavior and hold themselves accountable to the same standards they expect from their team.

**8. Collaborate with legal experts.** Employment law can be complex, and regulations may vary by jurisdiction. Collaborating with legal experts ensures that policies, procedures and actions are compliant with relevant laws.

**9. Focus on continuous improvement.** An effective harassment and discrimination prevention program is never static. Regular reviews, updates and improvements to policies and training programs are necessary to reflect the evolving needs of the workplace and legal landscape. Associations must be committed to evolving and implementing best practices.

### A Moral Imperative

Preventing workplace harassment and discrimination is not merely a legal necessity—it's a moral imperative. By fostering a culture that emphasizes respect, fairness and inclusion, associations not only minimize risks but also create an environment where every individual can thrive.



*Lesley Muchow is general counsel and vice president of legal affairs and antitrust compliance at the National Association of REALTORS®.*





## POLICY

# Policy Clarifications

NAR's Member Policy team answers your top questions.

BY DANIEL DOEPKE



Are you ready to jump into Core Standards? Or maybe you're looking even further ahead to the National Association of REALTORS®' new Fair Housing training requirement for 2025? We're diving into your top questions.

### Q: In the "Financial Solvency" section of Core Standards, there is a list of recommended policies. Where can we get help crafting those policies?

A: First, it's important to note that these policies listed in the Core Standards form (fraud awareness and prevention, budgeting, dues collection, etc.) are not mandatory. As an example, an association may not need a staff travel policy if staff does not travel and there is no budget for it. However, many of the recommended policies are beneficial for an association to ensure financial solvency and integrity.

Fortunately, NAR has model documents that can be amended and tailored as needed to fit your association's needs, with the help of your local legal counsel. Your legal counsel can also be a great resource for crafting any other policies that your association might want to have to maintain a healthy financial outlook well into the future.

### Q: Our association was hoping to implement our Fair Housing training requirement sooner than 2025. May we? What about any other educational requirements we'd like to have locally?

A: There are two Official Interpretations of NAR Bylaws ([nar.realtor/about-nar/governing-documents/nar-constitution-bylaws#Interpretations](http://nar.realtor/about-nar/governing-documents/nar-constitution-bylaws#Interpretations)) that are relevant when it comes to any education or training that a local association wants to require as a condition of membership. Both interpretations lay out with specificity what subjects can be taught in any mandatory instructional program, and fair housing law is one.

One is Interpretation No. 18, which reads:

*"A Board rule which seeks to attain the aspirational objectives of the Code of Ethics by requiring, as a condition of Board membership, completion of an objective and non-discriminatory Indoctrination Course with a stated passing grade in an examination thereon is not an inequitable limitation on its membership."*

*[In other words], a board rule requiring the applicants for REALTOR® or REALTOR-ASSOCIATE® membership satisfactorily complete an objective and non-discriminatory indoctrination course covering the Constitution and Bylaws of the local Board, State Association, and National*

*Association, the Code of Ethics of the National Association, and anti-trust laws, fair housing laws, and agency laws is not an inequitable limitation.*

The other is Interpretation No. 37, which reads, in pertinent part:

*"A Board rule requiring that Board Members attend, on at least a biennial basis, a continuing education program comprised of not more than six (6) cumulative hours of instruction with respect to Board or Member practices that might result in a significant legal vulnerability and possible liability to the Board and its Members, such as violations of anti-trust laws, agency laws, civil rights laws, the Code of Ethics of the National Association, or other similar public policies, is not an inequitable limitation upon membership."*

*[As further explanation,] the National Association has long maintained a policy that it is inappropriate for a Board to have any mandated educational requirements other than a requirement for prospective Members or current Members to be familiar with the Constitution and Bylaws of the local Board, State Association, and National Association, the Code of Ethics of the National Association, and any rules, regulations, practices, policies or pro-*

*cedures of the Board that relate to being a knowledgeable and informed Member of the Board.*

*It is not appropriate to require competency and licensure training, which is provided by the state. However, when there is a clear and present danger that policies and practices of the Board or of its Members may result in significant legal vulnerability and liability to the organization and its members, it is reasonable to require that Board Member participate in a program sponsored by the Board to assist and educate Members in areas of high legal vulnerability.*

*Mandatory attendance should only be required at programs related to matters that, if education were not provided, might result in a significant legal vulnerability and possible liability to the Board and its members, such as violations of anti-trust laws, agency laws, civil rights laws, the Code of Ethics of the National Association, or other similar public policies.*

Beyond that, you should ensure that any mandatory education your association wants to prescribe falls within the subjects listed. ●



Daniel Doepke is director of member

policy at the National Association of REALTORS®.



### Learn More

Find model documents for Core Standards-recommended policies at [nar.realtor/ae/core-standards-financial-resources](http://nar.realtor/ae/core-standards-financial-resources).



## TECHNOLOGY

# A System That Adapts

As RAMCO celebrates its 15th anniversary this year, it's still innovating to meet the needs of diverse associations.



early two decades ago, a group of REALTOR® association executives envisioned an association management system that could serve the entire REALTOR® organization.

State and local AEs involved in shaping that vision included retired CEOs Rob Authier, RCE, CAE, of Massachusetts REALTORS®, Belton Jennings of Orlando REALTORS® and later the Virgin Islands REALTORS®, and Texas REALTORS® CEO Travis Kessler (then with the San Antonio association). The founders had struggled with third-party systems that were expensive and slow to adapt to their needs. They dreamed of giving associations and MLSs a central place to manage member data, and one that would integrate with current and future industry platforms.

Their vision became RAMCO, which marks 15 years of operation in 2024. Since its inception in 2009, RAMCO has been run by the National Association of REALTORS® as a nonprofit subsidiary to offer a competitive and cost-efficient option in the market. Today, more than half of all state associations and roughly 120 local associations are RAMCO users.

“The AE leadership knew that no two associations operate the same way, so any system had to be flexible enough to accommodate that diversity,” says Mike Cutlip, RAMCO product leader.

To meet that need, they chose an industry-leading technology, Microsoft Dynamics, as the underlying platform.

“It’s a great system for associations with four or more staff,” says Laura Vinci, director of association technology services for NAR. Smaller associations, she says, may find everything they need from the evolving REALTORS® M1 platform.

Those who haven’t considered RAMCO or who haven’t seen a demo lately will be surprised at how user-friendly the system is, says Cutlip: “Over the years, we’ve worked with associations to streamline processes, reducing system complexity while continuing to build functionality.”

“I highly recommend RAMCO as an exceptional partner,” says Rachel Tristano, CAE, RCE, CEO of South Shore REALTORS® in Massachusetts. “Throughout our history of subscribing, RAMCO has consistently delivered innovative technological improvements, significantly improving our operations and efficiency.”

According to Cutlip, the system is near infinitely customizable, allowing associations to add their own fields, data types, reporting and business automations. “This capability

comes from the underlying Microsoft Dynamics platform we chose at the beginning,” he says.

Amy Moloney, membership manager for Tucson REALTORS® and MLS of Southern Arizona, says her association has enjoyed new options for reviewing online applications, which helps reduce any mistakes in member input. “It has cut down our processing time for a complete application from four days to one day—and in some cases, we can even get them approved in a matter of hours,” she says.

“Associations are always looking to differentiate themselves,” says Cutlip. “Miami REALTORS® provides one of many examples. They offer education discounts for early dues payments, and the discounts are automated using RAMCO’s flexible business rules. Our subscribers are always coming up with unique offerings, and it’s exciting to see how they share [these ideas] through our community and meetings.”

Training is essential, so RAMCO staff operate three free training calls each week. There’s also training offered each year at the REALTORS® Legislative and NAR NXT meetings. And every April,

RAMCO hosts an annual user group meeting where association staff members who work with the system can learn what’s new, compare notes on usage and collaborate on solutions.

“We like to reinforce the collaborative nature of this product,” Vinci says. “New users buddy with experienced users for ideas on how to meet their needs.”

Because Microsoft technologies form the backbone of NAR’s RAMCO, REALTORS® M1 and e-commerce solutions, users can depend on regular security updates and technology upgrades. In the future, for example, RAMCO will benefit from Microsoft’s leadership building artificial intelligence into its applications. “It’s convenient that all our systems are married under this technology,” Vinci says.

Says Cutlip, “Our commitment to REALTOR® associations and Microsoft’s commitment to pushing the envelope when it comes to business technology set us apart. We’re excited about where we’re able to take our subscribers in the future—and to fulfill the vision of our founding board members.” ●



Mike Cutlip



Laura Vinci



## MIND OF THE MEMBER



# How to Become a Futurist

When you're an association executive, that's the job.

BY BOB TAYLOR

**T**he timeline of humanity demonstrates that how we do things, how we think about things, and how we communicate with each other always changes. This requires us to effectively figure out how to wisely transition from the past, through the present, into the future. Yet while the transitions and changes may be different, the process of effectively transitioning is timeless, applicable to all generations, and is best led by “futurists”—people who study and predict the future based on current trends.

For REALTOR® associations, the character traits of futurists usually reside with the association executive.

I recall listening to a skit my kids were watching on *Sesame Street*, which was trying to teach viewers about consequences. The idea was to think about the current situation, consider a course of action and evaluate how that action would change the way things were. It sounds pretty boring on paper, but in reality, this practice is the beginning of being a futurist.

Why is being a futurist important? Because it minimizes how much the future catches you by surprise. When you are part of an association, this is important. But when you are an AE, being prepared for the future is your job.

So, can you become a futurist, or is it a mindset you are born with? Yes and yes—but in both instances, it requires training and clarity.

**1 Know the difference between a wave and a tide.** Waves are fads, and tides are trends. Be curious beyond what you see, looking instead for the root causes. Be prepared to challenge your own understanding. This may be the most difficult task because unless you are willing to do so, you may be getting in the way of what you need to see.

**2 Look for the small signals, not the big signs.** By the time you see the big sign, the future is upon you. For example, 30 years ago, the melting in the Arctic told scientists

who were looking for the small signs that the planet is warming. Want an example you can see at home? Put a pat of butter in a saucepan on the stovetop and turn the burner to low. While you know that eventually the entire pat of butter will melt, it does so at the edges first.

**3 Become a historian.** Because you cannot see into the future, the only data you have available is the past. While history does not exactly repeat itself, patterns do repeat. Consider how the printing press, invented in approximately 1440, raised concerns that the device could lead to the spreading of multiple perspectives and viewpoints—and potentially misinformation. Today, the internet and artificial intelligence raise the same concerns regarding truthfulness, or lack thereof.

**4 Define how you are doing things.** At any given time, two trends are likely to exist simultaneously. One tracks how you do things today, and the second tracks how you will do things tomorrow. During times of stability, the former is the dominant pattern. In times of change, the latter emerges.

**5 During times of change, learn as if you are an “orphan.”** Residential real estate practitioners playfully refer to those moving into a new home more than six miles from their previous residence as orphans, or sometimes immigrants. Regardless of which term is used, the notion behind the label is that everything is

new—shopping, schools, municipal practices—and even the routes to work or to visit family members change. Associations should think of themselves no differently as the paradigms within which they currently exist start to change and innovation becomes imperative to survive.

**6 Be collaborative.** The ability to be a futurist requires multiple perspectives in a collaborative environment. Interestingly, while many entrepreneurs are futurists when they create their enterprises, they frequently fall into the trap of surrounding themselves with people who tell them what they want to hear—a leading cause of why most new businesses fail. One of my favorite insights into the importance of diverse thinking states, “When two or more people think alike, all but one is unnecessary.”

Finally, “Make it so.”

When put into practice, that line frequently uttered by Patrick Stewart in his role as Jean-Luc Picard, captain of *Star Trek: The Next Generation’s* Enterprise, is both a command and a wish. It assumes that everything needed for the journey is in place. It further assumes that once the journey begins, life happens. So, your ability to complete the journey depends on your ability to adjust the course, because far too much is outside your control. ●



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



### Future Forward

To further prepare for the journey of being a futurist:

1. Become a generalist when gathering information.
2. Find a mindless activity to occupy your conscious mind. Your subconscious mind may then create something quite useful.
3. Attend industry gatherings and ask questions.
4. Be childlike in your curiosity and do not accept, “We have always done it that way.”
5. Put forward ideas with as much background as possible and listen to feedback.
6. Write down ideas to coalesce them into concise, logical thoughts before sharing.



## INNOVATION

# Bold Move

Buying a moving truck to offer as a member benefit was the right decision for our association.

BY MEIGHAN HARRIS



he real estate industry is known for its competitiveness. Agents are always looking for ways to differentiate themselves from their peers. To further member retention, REALTOR® associations need to set themselves apart, too.

One way that some REALTOR® associations have been able to stand out is by providing unique and valuable benefits to their members. Recently, I presented to my board of directors the idea of purchasing a moving truck for our members and their clients to use, free of charge, as a member benefit.

This idea of real estate professionals providing a self-branded moving truck to clients is not a new one, but it is relatively uncommon for an association to provide that service. However, our REALTOR® association recognized that the bother of obtaining a moving truck is a common pain point for movers and decided to act.

The decision to buy a moving truck was not made lightly. The board had to consider the cost of the truck, ongoing maintenance and insurance costs, and the logistics of managing the truck and scheduling its use. One bonus is the tax deduction for vehicles that are over a certain weight, which is a full deduction that is not amortized over the years. After careful consideration, our board members saw more pros than cons and determined that the benefits to our members and their clients outweighed the costs.

In December 2022, we purchased a 16-foot box truck on a Ford E250 frame, which cost \$65,000, including the vehicle wrap fees. Our monthly insurance cost is roughly \$275.

### A Selling Point

For members, having access to a moving truck can make a big difference in their business. It allows them to provide an additional service to their clients that sets them apart from other real estate agents in the area. For some clients, it may eliminate the need to rent a truck, reducing the hassle and cost of moving, especially important if they're on a tight budget after buying a home. It's a great selling point for an agent's listing presentations.

Of course, association staff love using the truck as a display at member and community events. It's also been useful in transporting auction items for our golf tournament as well as moving centerpieces, AV equipment and hundreds of awards



BONITA SPRINGS-ESTERO REALTORS®

for our awards ceremony. Plus, last year, we held a "Stuff the Truck" fundraiser to fill the moving truck with school supplies for local schools.

### Some Setup Required

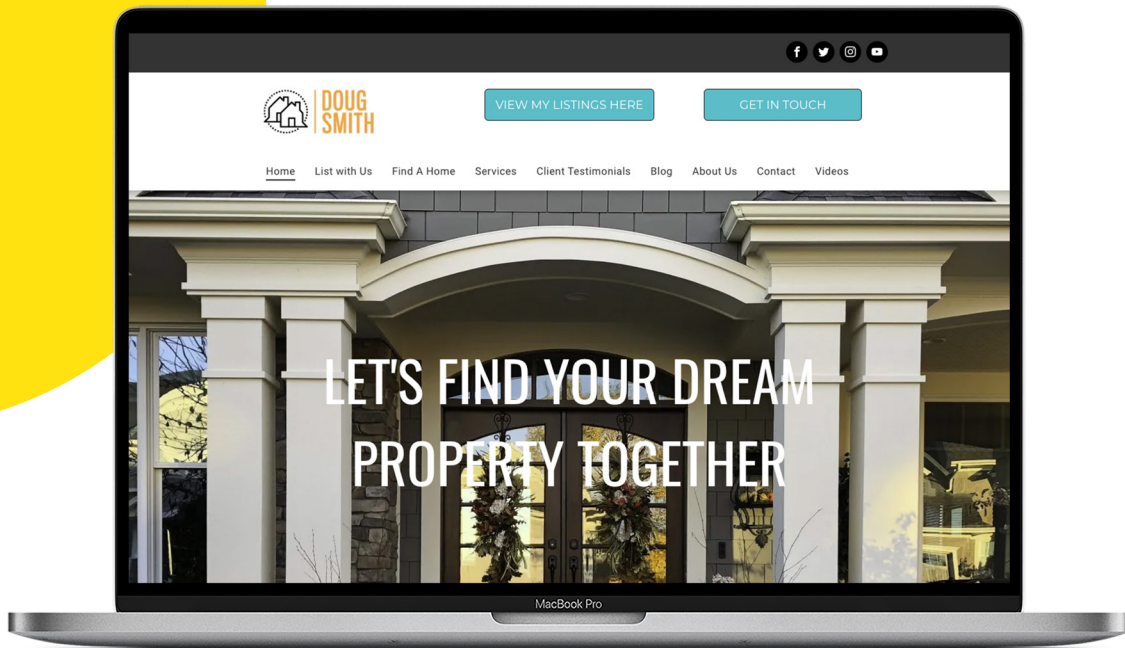
There are some logistics involved in having a moving truck as a member benefit. Our association has established guidelines, including scheduling procedures, insurance requirements and rules for returning the truck in good condition. We created a rental form through our association management software, and we provide a link and calendar showing availability. We also installed a GPS tracker, which monitors the truck's location and rate of speed as well as mileage. In addition, we have to make sure the truck is properly maintained and serviced to ensure that it remains in good condition for users.

The decision to purchase a moving truck was a bold move by our association. Despite the logistical challenges, it has proved to be a valuable benefit. Members and their clients have expressed appreciation, and the association has received positive attention for its innovative approach to supporting members.

"I had the opportunity to use our new box truck yesterday," wrote REALTOR® member Wade Abed of Royal Shell Real Estate in a recent Facebook post. "You would not believe how many people recognized me driving down the road. What a great form of advertising. ... It was an awesome experience. Spread the word; what a great surprise for your buyers and sellers!" ●



Meghan Harris, RCE, is CEO of Bonita Springs-Estero REALTORS®, Fla.



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## Family Man

Bluegrass REALTORS®  
CEO Justin Landon

Although his grandmother and father were REALTOR® volunteer leaders, Justin Landon, RCE, AHWD, CEO of Bluegrass REALTORS®, says a career in real estate was never part of his plan. But after 10 years working on the Hill, joining a REALTOR® association gave him the opportunity to make a more local impact. “It felt like coming home,” he says. Here, Landon talks about what still inspires him, his team and his members every day.

### **Q: What do you love most about being an association executive?**

Real estate has put food on my family’s table for three generations. It is one of the truest meritocracies left in the world, and I’m proud to be a small part of ensuring the profession continues to be there for generations yet to come.

### **Q: How do you help create that same passion in your staff?**

Association staff function best when everyone believes in what they’re doing. I spend a lot of time with my team on our members’ businesses and the industry we support. I

want them to understand the profession—how our members help people reach the American dream and how they make a living.

### **Q: How are you helping your REALTOR® members contend with real estate market challenges?**

Mostly with data. We spend a lot of time and resources helping our members understand the marketplace. Like the National Association of REALTORS®, we’ve made wellness a strategic focus for 2024, with programming around both financial and mental health. Limited inventory and buyers frustrated with rising interest rates have put tremendous pressure on our members, and we want to help anywhere we can.

### **Q: You were named an AE Leader of Tomorrow Young Professionals Award recipient in 2021. What’s your vision of what it takes to be a successful REALTOR® AE?**

The most successful AEs have transitioned from being managers to being leaders. That’s not easy, because as an AE, you’re often leading from the back and expected to be ready to lead from the front if needed. We serve a lot of different personalities and business types. Acknowledge those differences, be vulnerable about the challenges and—like in fifth grade math class—always show your work.

### **Q: You’ve said you are an avid—but bad—golfer, love basketball and are always reading. We want to know more.**

My best round was an 89—par for my 21 handicap! PGA, here I come ... unless my Los Angeles Lakers sign me to a 10-day contract. I’m keeping my options open. In the meantime, I’m reading *She Who Became the Sun*, a novel set in 14th-century China, by Shelley Parker-Chan. ●



# Good Neighbor Awards

**We see 20 to 25 new families a week now. I have people walking into the pantry with the REALTOR® Magazine article in their hands. People who need us are finding us because of the Good Neighbor Award.**

*Karen DeMarco  
Founder, The Food Brigade*

REALTOR® Karen DeMarco began by cooking and delivering meals during the pandemic. It was her way of paying it forward after her community took care of her when she had cancer. Today, the Food Brigade has three locations and fed **67,000** people in 2023.



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Man Huynh  
Real Estate Agent  
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Felicia Mares  
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