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REALTOR® **RAE**

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SUMMER 2022

BUILDING IN SUSTAINABILITY

It starts with just one step

Page 10

**Expert Advice on
Strategic Planning**

Page 16

Bring Your History to Life

Page 20

**Shared Services = More
Member Benefits**

Page 30



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FEATURES

Building In Sustainability

No matter how we're defining it, sustainability offers many long-term benefits for association members and their communities. PAGE 10

The Question of Strategy, Answered by Planning

Associations can be a powerful force, and it starts with strategic planning. PAGE 16

The Association (Hi)story

Celebrating a milestone anniversary? Call on the NAR Library & Archives to help tell the story. PAGE 20

AE VOICES

AE committee chair update

Sustainability Is a Group Effort

PAGE 2

profile

The Value of 'Why?'

For Bob Hart, that question has helped drive sustainability in his association. PAGE 32

NEWS

hot topics

Short-Term Rentals Under Fire

PAGE 4

in the spotlight

HAR Tackles Rental Scams

PAGE 5

professional development

Congratulations to New RCEs

PAGE 6

good reads for AEs

High Achievers Have It

PAGE 8



10

NEED TO KNOW

MLS

Under All Is the Land

PAGE 24

governance

Top of Mind

PAGE 26

human resources

Be Good to People

PAGE 27

mind of the member

Developing Leaders Requires ... Leadership

PAGE 28

law & policy

Unrelated Business, Income, and Tax

PAGE 29

small board

Sharing Is Caring

PAGE 30

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Sustainability Is a Group Effort

“Sustainability” reminds most of us to recycle, use less water, and reuse bags. For association executives, it should also remind us of the sustainability, continuity, and long-term success and value of the REALTOR® association. To ensure the association’s continued relevance in our ever-changing world, AEs should keep sustainability at the forefront.

The sustainability of REALTOR® associations is directly tied to two of the goals established by the Association Executives Committee, namely member engagement and experience, along with the Accelerator Achievement Program.

The first goal focuses on identifying unique and innovative opportunities that enhance what we offer our members. It emphasizes member success and profitability and explores new technologies that can help associations meet members where they are by delivering services in a way that aligns with how members do business. The second goal focuses on challenging associations to continuously innovate and raise the bar to sustain relevance and provide exceptional value into the future.

To ensure the association’s continued relevance in our ever-changing world, AEs should keep sustainability at the forefront.



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Engagement and sustainability are closely intertwined. The more members engage and are involved, the more they invest in the success of and their connection to the association. Engagement can take on many different forms, like volunteering on a committee, attending events, investing in RPAC, responding to a survey, or engaging on the association’s social media channels. When we as AEs share with our members the impact we have on the industry and their business, that is critical to their continued success and that of the association.

The AEC is also focused on discovering new ways for our members to experience value. One way is by putting yourself in the shoes of a REALTOR® and offering the benefits that person needs—no matter where that person is in the transaction or the stage of business development. Striving for diamond-level performance in all that your association offers—from world-class customer service to creative programming to emerging technology—will ensure members experience and feel the impact of that value.

In addition, the AEC is challenging associations to identify innovative benefits

and services—and how to offer them—to ensure sustained relevance into the future. This means staying ahead of the curve on the issues our members face, actively monitoring trends in the industry, and being proactive rather than reactive. Programs like the National Association of REALTORS® REACH Labs have been created to foster collaboration between member expertise and organizational resources to identify game-changing technology companies that can contribute to our field.

The sustainability of the REALTOR® association is a group effort that requires all of us to strive to provide exceptional value, drive innovation, and impact the real estate industry. Having a member-first mentality will keep associations relevant and in the front of members’ minds as they look for a partner to provide valuable resources and benefits to help them succeed well into the future. ■



Ryan T. McLaughlin, CAE, RCE, is CEO of the Northern Virginia Association of REALTORS® and 2022 AEC chair.



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Short-Term Rentals Under Fire

The short-term rental market is hot, and some local governments are treating it like a fire gone out of control.

Of primary concern is rentals becoming party homes, with resulting noise, crime, and mayhem. Another worry is residents being priced out of markets by investors. As a result, municipalities have proposed restrictions such as higher permit fees or taxes, primary residence requirements, or mandating rentals of seven consecutive days or more.

It can be a divisive issue. But those restrictions, say some associations, infringe on property rights and hurt local economies that depend on tourist dollars.

New Jersey REALTORS® has advocated for compromise at the local level, says Bruce S. Shapiro, director of RPAC and regulatory affairs. “A lot of times, what it is with short-term rentals is that one [bad] situation ruins it for everyone else,” he says.

Shapiro says that his association works with mayors and city councils to encourage regulation—such as penalizing a property that garners a certain number of complaints—rather than outright bans or heavy restrictions. He’s had success in at least five municipalities, including Cherry Hill and Absecon.

He and his team also work proactively to address proposed ordinances well before they come before a city council; this is where local REALTORS® on the ground can play an active role in leveraging their relationships to help start conversations. “Compromise is key,” he says. “If you can show the town you’re willing to work with them and compromise to address both



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your concerns and theirs, that’s a win on an issue like short-term rentals.”

At the state level, Michigan REALTORS® has been working to provide information to legislators in the development of HB 4722, which at press time had been passed by the state’s House but was coming before the Senate. The bill would amend Michigan’s zoning act: Short-term rentals would be considered residential properties, they would be permitted in all residential zoning districts, and they would not require a special permit different from that of other homes in the same zone. Local governments would still regulate short-term rentals for noise, traffic, or other nuisances and could limit the total number of short-term rental units.

It’s about striking a balance between the property rights of people who own a second home in a community and the rights of full-time homeowners, say Brad Ward, vice president of public policy and

legal affairs, and Rob Campau, RCE, CAE, CEO of Michigan REALTORS®.

The bill would also firmly define short-term rentals as a residential use, a first for the state. Both Ward and Campau say it would preserve the ability of middle-class residents who have invested in lake houses to continue to afford those homes rather than sell them to investors. In addition, the availability of short-term rentals in lakeside resort areas would enable the local ice cream parlors, bookstores, and restaurants that rely on seasonal tourism to stay in business.

For associations facing similar issues in their towns or states, “building that coalition of interest and reaching out to the general public to get them to talk to legislators about this is really important,” says Ward. “We’ve also done public outreach—radio, ads, mailers, and digital advertising—to make people aware that this is a real issue and that if they typically rent every summer, their family vacation may not be available next year.”

Campau says he foresees more short-term rental ordinances popping up at the state and local levels across the U.S. “Be prepared,” he says, “and have an actively engaged membership at the local as well as the state level. ... It’s complicated, and I think it’s getting more complicated by the day in some sense. But I think the foundational argument of private property rights and the right of individuals to have quiet enjoyment of the property they own is a fundamental American principle we’re going to keep defending.” ■

HAR Tackles Rental Scams

“If it sounds too good to be true, it probably is.”

Houston Association of REALTORS® President and CEO Bob Hale sees these words on billboards every day on his way to work. They’re part of a passion project of HAR, in partnership with Crime Stoppers of Houston and Clear Channel Outdoor.

A few months ago, says Hale, families began stopping by HAR’s office to complain that they’d been scammed: A rental home is posted online, with convincing photos and a great price. The “landlord” asks for a security deposit, then arranges to show the rental over the weekend. Come the weekend, the renters show up, and they discover the home is already owned or rented by someone else. And their money? Gone.

Hale knew that HAR had to combat the problem. Rental scams aren’t new, but “what seems to have exacerbated the problem more recently is the limited inventory, so some consumers may see a great deal and think they need to move quickly to secure the property before someone else does,” he says. “Additionally, the fact that many people work remotely or meet virtually has made it seem more normal to not ever meet the ‘landlord’ or ‘property manager’ in person.”

It felt natural for the association to reach out to Crime Stoppers of Houston, a community partner. Both organizations also work with Clear Channel Outdoor, which jumped at the opportunity to donate advertising space, says Hale, through six traditional printed billboards in the greater Houston

With 38% of the Houston MSA speaking Spanish, Houston Association of REALTORS® made a point of sharing its anti-scaming messages in two languages.

Rental scams aren’t new, but “what seems to have exacerbated the problem more recently is the limited inventory.”

area—four in English and two in Spanish. Clear Channel also provided 32 digital billboards in suburban areas, plus 15 poster boards on surface streets, also in both languages. The message—which includes a link to har.com/tips to help consumers avoid rental scams—has also appeared in HAR’s own Sunday print ad in the *Houston Chronicle*.

Including ads in Spanish was important, says Hale, because scammers tend to target the Spanish-speaking community. “There is a natural language barrier in some cases, or the person may not

know how a rental transaction is supposed to work,” he says. “Many in the Spanish-speaking community are also less likely to report to authorities that a crime occurred. According to the U.S. Census Bureau, 38% of the population of the Houston MSA speaks Spanish in the home, which highlights the importance of communicating in Spanish whenever possible.”

HAR directs victims to report scams to the Federal Trade Commission or the Texas Attorney General’s Office. The campaign is set to go through the end of 2022. ■

Congratulations to New RCEs



These 22 REALTOR® association executives earned their REALTOR® association Certified Executive designation after an extensive course of study and exam. RCE is the only designation created specifically for REALTOR® association executives. It exemplifies goal-oriented AEs with drive, experience, and commitment to professional growth. For designation requirements and more information, visit nar.realtor/rce.



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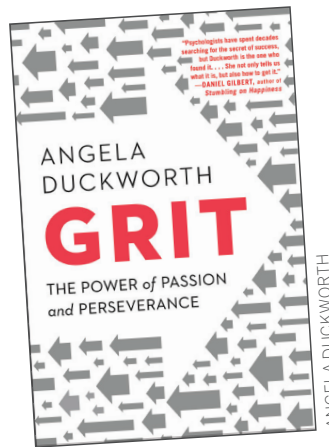
Grit offers us the staying power to succeed, not just in our jobs but in anything we pursue.

How do you define outstanding achievement? Is it natural talent that helps us achieve, or is it tremendously hard work and practicing our talent day in and day out?

I am in awe of outstanding achievers but have always wondered how they got to that achievement level. How does someone become a National Spelling Bee winner, spelling words I have never heard? How does someone go through years of rigorous training to become an Olympian—training that I could not endure for more than a day? Or how does an association executive find success and stay in the same position for 10, 20, or even 30 years?

As a newer AE, I am hungry to discover the secret to success or—as Angela Duckworth calls it—*Grit*. Fascinated by what makes someone a high achiever, Duckworth has spent her professional research career discovering how these high achievers become successful. Her research led her to develop the Grit Scale, described as more effective at predicting job retention than any other commonly measured personality trait, including extroversion and emotional stability.

Where you fall on the Grit Scale depends on your unique combination of passion and perseverance. Curious, I followed the instructions and did not overthink my answers to the questions in the version of the Grit Scale offered in the book. I was not too surprised to discover that I scored 4.3 on the 5-point scale, which means I am grittier than 80% of Americans. While I've always known I am a self-starter, I am



How does an association executive find success and stay in the same position for 10, 20, or even 30 years?

by no means a prodigy in any one subject. The good news is that the book goes on to clarify how you can grow grittier by developing four psychological assets: interest, practice, purpose, and hope.

Interest is developed by exploring what you are curious about and then continually following up on that curiosity. Encouragement from those around you can help you discover your interest. Then, to further that interest, you

need to deliberately *practice* by making it a habit. Establishing daily rituals can help create the habit of practice. *Purpose* is defined by Duckworth as “the intention to contribute to the well-being of others.” For example, knowing that we are making positive contributions to society is an important component of grit. In the case of AEs, do we see our occupation as a career or as a means of making property ownership possible for all? Finally, we also need the kind of *hope* that helps us get up after mistakes. It’s an optimism that perseveres over adversity.

One of the most interesting parts of the book discusses the culture of grit. For most of us, culture is a powerful identity shaper. The culture that surrounds us often influences our human experience. Duckworth suggests that to be grittier, we should find and join a gritty culture. If you are a leader who wants your organization to be grittier, it’s up to you to create that gritty culture.

To discover more about these secrets to success and work on your own special blend of passion and perseverance, read *Grit*. It would also be a great book for parents to help encourage their children on a healthy path to becoming a high achiever. ■



Stephanie Moody is AE at the Sussex County Association of REALTORS® in Delaware.

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BUILDING IN SUSTAINABILITY

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No matter how we're defining it, associations are embracing the many long-term benefits of sustainability for their members and their communities.

BY ROBERT BITTNER

“Sustainability is a new topic to a lot of members and a lot of association leaders,” acknowledges Amanda Stinton, director of leadership and sustainability for the National Association of REALTORS®. “It’s also pretty abstract.”

For instance, some of the language used in talking about sustainability can be fraught with social and political baggage, which can sidetrack discussions. “If we walk into a room of REALTORS® and say the words ‘climate change,’ we will turn off half the crowd,” says John M. Sebree, RCE, CEO of the California Association of REALTORS®.

Despite the challenges, REALTOR® associations across the country are embracing a wide range of approaches on what it means to be sustainable. In the process, they are improving energy efficiency, reducing long-term costs, building for the future, and impacting the lives of their members and their communities.

Leading From the Top

Stinton notes that the goals of NAR’s sustainability group are to help build sustainability awareness and provide resources for member associations. Currently, she and her team are developing a one-hour online sustainability course, scheduled for release in the third quarter of this year. “We’re also trying to help increase sustainability awareness through a joint initiative with the National Association of Home Builders, called ‘Home Performance Counts,’” she says.

Perhaps one of the group’s most influential resources so far is a comprehensive report on industry sustainability efforts published in January. The report, which categorized these efforts under the key pillars of environment, social, governance, and resilience, is known as ESG+R. “It’s a great snapshot of what’s happened over the past 12 months,” Stinton says, “but it’s also a good tool for associations to use to gather ideas and spark local conversations.”

Member Resources

Kimberly Pontius, RCE, CAE, CEO of Aspire North REALTORS® in Michigan, enthusiastically agrees. “If you don’t know anything about ‘green’ or sustainability or resilience, the ESG+R report is a great place to start,” he says. In fact, the report was the catalyst for his association’s own sustainability committee. “It was something tangible I could put in the hands of the board of directors and say, ‘This is the new value proposition for our industry,’” he says.

Aspire North is now pursuing several programs that address elements of the report’s four pillars. “For example, right now we are in the process of training [members] on septic systems, which speaks to the topic of resilience,” Pontius says. “Once you get about halfway up the Lower Peninsula of Michigan, unless you live in a metropolitan area, everything’s on septic. There are people moving here who have been used to a city sewer system, and they don’t understand the importance of maintaining a septic system.” Through its members, associations can help fill those kinds of gaps.

Associations are also helping members respond to buyers’ increasing interest in learning about a property’s green features and other factors affecting sustainability. For example, New Hampshire REALTORS® wanted to ensure its members could better earn the trust of buyers and sellers during real estate transactions when the conversation inevitably turns to energy efficiency and renewable energy. Its sustainability working group launched in 2017 to provide members with resources and educational opportunities regarding renewable energy and “green building.” The group has established a resources webpage, hosted a two-day NAR GREEN designation course multiple times, and held two symposiums. It now oversees a column in the association’s quarterly magazine and is creating sustainability-related content for the association’s annual conference in September.

“It was the intention from the beginning that this working group was to help our members be as educated as possible in this



MINNEAPOLIS AREA REALTORS®

MAR incorporated rainwater harvesting cisterns into its new exterior landscaping so it could use the runoff for irrigation.

space,” says Dave Cummings, director of communications for NHAR. “That’s why it falls under the Professional Development Committee, not public policy; we’ve been intentional about not wanting it to be an advocacy group.”

REALTORS® can find huge value and benefit in promoting the energy efficiency features of a property. That’s especially the case when those REALTORS® are using green MLS fields, says Stinton. Yet too often these fields are overlooked or underutilized. “Sometimes there’s a disconnect when it comes to MLSs actually activating and members using those fields,” she says.

It’s an area worth exploring, adds Stinton, since “REALTORS® who do use those fields are able to share the value of a property’s home performance story and cast a wider net, allowing these features to be more easily searchable and accessible to folks working with clients who prioritize sustainability, energy efficiency, and green features.”

Sustainability In Our Own Spaces

At Minneapolis Area REALTORS®, “Sustainability is one of our core values,” says CEO Carrie Chang. “Because of that, our Environmental Initiatives Committee is driving a lot of the thinking for the association’s priorities, making sure that sustainability is part of our strategic plan.”

But MAR wanted to go a step further. “We wanted to demonstrate the functionality and beauty of sustainability right here in our own space,” says Chang.

The association recently determined that its building and property—which are owned outright—could be made much more functional. While it was looking at exterior improvements, expanded outdoor space, and an enlarged parking lot, “we asked how we could accomplish those goals in a way that stewards the land and showcases sustainability best practices,” says Chang. “When members are gathered here, we want them to see in action some of the things they might learn in a class or read about.”

The project was complicated by the property’s location within a watershed district, but that turned into a silver lining. “We reached out to the district to learn more about partnership opportunities and how we can be better water stewards,” Chang says. “We were able to secure \$25,000 of grant money from the watershed district to help us improve our property in terms of runoff, drainage, irrigation. That set us on a path of looking at everything we could do regarding water conservation.”

Now, MAR has porous pavers on its patio. It has a rainwater harvesting system so that its roof runoff is channeled into two large underground cisterns, which can then be used for irrigation. In its landscaping, it chose native and prairie grasses, which are dominant in Minnesota and don’t require as much watering and management; their root systems also help to combat erosion.

“We’re a relatively large local association—almost \$8 million in annual revenue, almost 10,000 members—so a project like this does require some amount of scale,” admits Chang. “But the real challenge is defining the value proposition of a project like this. It can’t just be about beautifying the space.”

While Chang expects to see a reduction in the association’s water utility bills and some potential city credits for stormwater fees, assessing a project’s overall return on investment should go beyond weighing the financials. Chang believes it’s also about making a difference within the community, determining “how we, as leaders of the industry—as REALTOR® members trying to help homeowners—can bring sustainability to life for our community through our own property.”

From that perspective, the association is already seeing a meaningful return for building on its core values. The property, Chang says, “is a living, breathing example of what we try to teach people in classes.”

The Advocacy Piece

While some associations focus on exemplifying sustainability through developing member training and resources or taking innovative approaches to grounds and building improvements, others are in a position to lobby for change with state and local governments.

The California Association of REALTORS® has put advocacy for the housing sector at the forefront of its sustainability efforts since the early 2000s, according to Sebree. For CAR, that means focusing on the effects of the state’s changing climate: heat waves, wildfires, floods, persistent droughts, and rising sea levels. “From a legislative perspective in California, sustainability is linked to almost every policy related to new development and always under consideration as we seek to improve the efficiency of existing units,” Sebree explains.

In response, CAR has appointed a sustainability, climate change, and resilience task force to examine pending legislation and weigh the association’s possible responses. Recently, the task force also began to explore an expansion of the state’s Residential Environmental Hazards booklet, last updated in 2011, to include information related to the effects of climate change that pose a general hazard to most California property owners. “CAR is very supportive of solutions that add value to communities, while increasing resilience and improving quality of life,” Sebree says.

Such advocacy takes dedication and perseverance. It can be a challenge to avoid the hot-button reactions that often accompany

the words “climate change,” but Sebree says that shouldn’t stop the conversations from happening. “That didn’t stop me from being a delegate to the U.N. Conference on Global Climate Change when I worked for Florida REALTORS®, because I felt there was a place for us at the table,” he says. Now, Sebree is seeing a growing openness to discussions that explore “issues as they relate to the real estate versus engaging in the political debate on the larger issue” of climate change.

A Bigger Definition

While “sustainability” may often refer to environmental concerns, NAR’s ESG+R report takes a broader view. It defines sustainability as “meeting the needs of the present without compromising the ability of future generations to meet their own needs.”

Kim Cox, CEO at Ozark Gateway Association of REALTORS® in Missouri, couldn’t agree more. “My first thought when I think of sustainability is the sustainability of our association in our community,” she says. “We provide local jobs. Our conference center provides a place for groups to come together. We are often a light in our community, and we want to keep that going.”



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MINNEAPOLIS AREA REALTORS®

MAR's new back patio area features a planted meadow and quaking aspen trees, all native plants. A rainwater harvesting system is buried underground.

To help ensure the association's future within its community, in 2018, OGAR built a 1,500-square-foot office building and completely renovated a 2,600-square-foot attached conference center, incorporating as many sustainable features as possible, including solar shades, energy-efficient appliances, and LED lighting. In addition, Cox says, "We recycled our construction waste, giving it all to the Habitat for Humanity ReStore so those supplies could go to other people in the community."

Along with these more typical steps, Cox says, "We try to do things that encourage each other and lift each other up," which helps to sustain the membership. "For instance, we created a REALTORS® benevolence fund to help people financially who may be going through something unexpected or

traumatic. We launched it in 2009, and the fund is still active today. So far, we have helped over 30 members, mostly with medical-related applications."

"Make a Difference Monday" has also become a popular way of supporting both the community and the association's members. "Mondays can have a negative connotation," Cox says, "so we encourage members to do something that changes that. It can be the smallest of things: We might post something on our members-only Facebook page to remind them to help a client, help a co-worker, network with peers, maybe paint something around a client's house, or mow a yard. It's a reminder that we are here to help."

That First Step

NAR's Stinton points out that, while sustainability may seem overwhelming and unwieldy, associations can take any one of several actionable steps to make a difference. "Create a committee or task force," she suggests. "Seek out grant opportunities from the national association. Engage members through education. And then consider adding sustainability into the strategic-planning process. For both the operation side and the member-engagement side, these are activities that could help pepper sustainability throughout an association's work."

At the same time, it can be "easy to go in with a lot of enthusiasm and a lot of big ideas and then not necessarily have the resources to carry those out," says NHAR's Cummings. "So, create manageable goals for yourselves and then dive in with a lot of energy and see if momentum can build from there."

It also comes back to the members. Chang recommends consulting members who are passionate about sustainability; not only can you benefit from their expertise, but their perspective might lead to unexpected solutions. "I think sometimes this work doesn't get done because people assume it's too expensive or too difficult or they think about one tactic—like, for example, solar panels—and they glom onto that, versus really thinking about a more holistic approach," she says. "Your knowledgeable members can help you see the whole picture."

Abstract or not, sustainability initiatives are a part of the job, she adds. "If we're in the business of real estate, then the economic value of the real estate our members are helping clients transact will erode over time—literally and figuratively—if we don't take care of it," she says. "Transactions are only as good as the properties we have to transact. If the inventory is poor because it's not stewarded, not taken care of, then the whole business model is threatened. That's why sustainability is so important to REALTORS®."

Robert Bittner is a Michigan-based freelance author and journalist.

For More

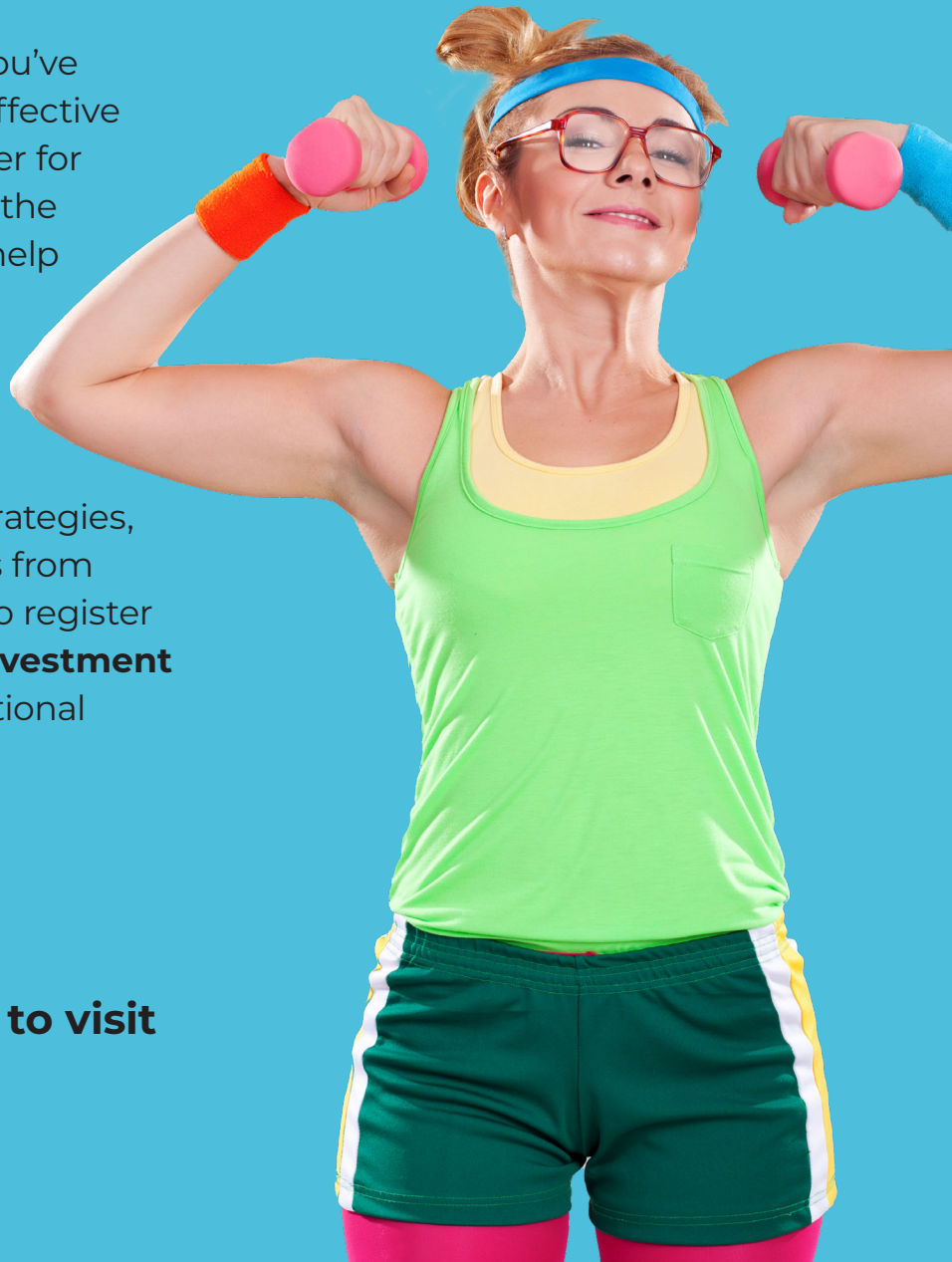
Visit nar.realtor/sustainability for sustainability resources. To learn more about Home Performance Counts, visit homeperformancecounts.info.

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Make sure your members know you've got their back when it comes to effective money management. NAR's Center for REALTOR® Financial Wellness has the tools and resources necessary to help your members strategically build their businesses and position them for long-term success.

The platform provides financial strategies, useful tips, and even special offers from Morgan Stanley. Members can also register to attend the **September 2022 Investment Summit**. Special pricing and additional event details can be found at nar.realtor/cfw/live.

Encourage your members to visit FinancialWellness.realtor





THE QUESTION OF STRATEGY, ANSWERED BY PLANNING

Associations can be a powerful force in their communities,
and it starts with strategic planning.

In a world where the only constant seems to be change—and in an industry where that change is becoming increasingly disruptive—the need for REALTOR® associations to balance strategic vision with actionable results takes on a new level of importance.

A key tool for providing focus and direction in these challenging times is the strategic plan. Associations are leaning on strategic planning now more than ever, which is why REALTOR® AE reached out to an expert for a wide-ranging Q&A covering the benefits, pitfalls, and necessities of creating a strong strategic plan.

Jim DeLizia has spent his entire career working in the association space, first with the National Association of Home Builders in Washington, D.C., and since 1997 with his own consulting practice, DeLizia Consulting Services. While not solely focused on REALTOR® issues, he has spent a great deal of time working with state and local REALTOR® associations and National Association of REALTORS® affiliates on strategic planning, leadership and organizational development, governance, and training design. He also works with the National Association of REALTORS® on its strategic plan.



REALTOR® AE: First of all, Jim, why is a well-developed strategic plan so important to a REALTOR® association?

Jim DeLizia: Right now, REALTOR® associations are dealing with a wide range of issues that are really complex and problematic. These

include technology, competition, and how to keep the REALTOR® at the center of the transaction when there are so many third-party disrupters and consumers who can't tell the difference. A strategic plan helps REALTOR® associations craft thoughtful, specific plans for overcoming such challenges.

RAE: What key elements should a strategic plan contain?

JD: An effective strategic plan should balance the need for clear direction and priority with providing flexibility for the leaders to respond to changes in the environment. That can be accomplished through three components:

- A strategic framework with the long-term view: mission, vision, pillars, long-term goals, and operating values.

- The strategic plan, which gives the midterm view: issues to address, milestones for progress, and results to be achieved within the planning cycle.
- The short-term view, with annual deliverables: concrete steps that inform committee structure and charges, budgets, and staff operating goals.

RAE: Can you break down how the strategic planning process should run?

JD: The process starts by determining the strategic planning goals: Is this simply an annual plan update, an exploration of several particularly complex issues, or a total plan reboot?

After that comes research strategy. Strategic planning is a knowledge-based process. A planning group that relies only on its own observations or experiences will produce a plan with a limited view and may miss important challenges or opportunities for the association.

Then comes preparing for and leading dynamic planning sessions. This includes summarizing the research data into a readable background document and sending it out to the planning group well before the first session, so they can be prepared to hit the ground running.

During this first planning session, I'll often conduct an exercise to set the tone. I'll break them up into small groups and give them a scenario like this: Imagine that five years from now, you're reading your favorite newsfeed. You come across a headline that reflects the impact this association has had. Without using the name of the association, write that headline.

This immediately gets them thinking about the organization's impact, the vision they have for it, and the difference they want it to make. Then, I'll ask them what it's going to take to make those headlines become a reality. This can all be done in 15 or 20 minutes and gets them where they need to be for the rest of the project. It also helps me read the group, because as a facilitator, one of my jobs is to manage group dynamics.

Along with the development of review and approval drafts, the final step includes a serious discussion of the system the association will use to structure plan implementation, track and measure plan progress and success, report progress and accomplishments, and create a planning cycle that keeps the plan fresh and updated.

RAE: Is it important to get a diverse mix of staff and members involved in the process?

JD: Different perspectives are certainly important to understand. During the *research phase*, be sure your findings reflect the diverse spectrum that makes up your membership and staff team. When you get to the *planning phase*, involve the staff management team and

members who have a clear understanding of how the association runs and its current activities.

I've done strategic planning with as few as eight and as many as 35, but ideally the group should include between 12 to 15 people. With 35, it's going to be a different process.

Bottom line: Planning is a governance function. As a result, the association board must ultimately understand and own the resulting planning decisions. Ideally, the board, plus a few emerging leaders, would constitute the planning group. If that is not feasible, they should have significant representation on the planning group, with the opportunity to provide input as part of the research strategy.

The support of an outside facilitator can also help. The added cost of hiring a facilitator should be weighed against the benefits, including allowing the leaders and staff to be full participants. As an objective third party, a facilitator can also manage group dynamics, which is often politically difficult for a leader, member, or staff member to do.

In addition, an outside facilitator can bring valuable perspective. Although industry trends are certainly important, so, too, is the need to consider macro trends, particularly for REALTOR® associations, since they can be significantly impacted by technology, cultural shifts, or the regulatory and political environments.

RAE: What are common mistakes or oversights?

JD: The biggest mistakes I see made are at the start and the end: 1) not taking the time to seek input and information to support the planning group's deliberations; and 2) not considering a solid execution strategy, structure, and process. For example, if the deliverables or action items are pulled out of the plan and not linked to the outcomes and milestones they are designed to accomplish—or if the overall plan doesn't represent a solid consensus among stakeholders—the effort will fall short.

Also, many planning groups are more comfortable simply tweaking current approaches. They often have a hard time imagining the difficult approach they need to take. One area where you see this is professional development, due to trends and expectations challenging the relevance of association education. With so many competing sources for professional development these days, associations are finding they have to rethink their educational delivery methods but may have difficulty adapting.

Another common consideration tough for planning groups to understand is the impact their decisions have on the structure, operation, and capacity of the association. This is why staff are an essential partner in the planning process. If, say, the group sets a goal to boost member engagement and broaden ways members can be involved

in the association, members alone might not understand everything involved in managing all that increased volunteer involvement.

RAE: If it derails, how can the process be put back on track?

JD: Sometimes, what's needed is to go back to a point in the process where there was general agreement and work in smaller steps to build consensus.

In other instances, it may be better to have the group frame a thorny, complex issue that is stalling the process—agreeing on the facts of the situation, the main challenges or opportunity to be addressed, and the desired outcome—and then move on, making it a priority for another, targeted group to work through.

Or it could be that strong personalities or points of view are impeding the process and limiting participation. In those cases, clear agreement of discussion rules and effective facilitation of group dynamics will be required to put things back on track.

But sometimes, it is not recoverable, and the process has lost too much credibility. In this instance, it's best to stop, regroup, and even start over after some time has passed.

RAE: How has strategic planning changed in the last five years?

JD: Rapid change has caused the planning process to become much more nimble and responsive. Time frames have shortened, and a shift to real-time evaluation has become a necessity.

The process of planning had to change dramatically to adapt to the virtual environment, and we learned a lot in the process. For instance, by “chunking” the process into small-bite discussions with space in between, members have more time for concentrated discussions and to reflect before coming back together for the next step.

These days, many of my clients are considering a mixed-method planning process—a virtual two-hour session to examine the data collected, assess implications, and draw conclusions, then an in-person session to discuss direction, goals, and milestones, then another short virtual session to define priorities, tie up loose ends, and talk through the implementation strategy.

While it may have been assumed within the association community that the exponential pace of change would make traditional strategic planning a thing of the past—and few are being hit as hard by the fast pace of technological change and competition as REALTORS®—there continues to be a need for leaders to come together to assess, agree, and act.

RAE: Finally, if you could write your own headline suggesting the impact of associations because they successfully underwent a strategic planning process, what would it be?

JD: Without a doubt, the headline would read: “REALTOR® associations emerge as powerful, undeniable force in communities for access to safe, affordable housing and homeownership for all.”

Strategic and Sustainable

While sustainability isn't necessarily a bucket item within a strategic plan, Jim DeLizia says he is seeing many associations examining their positions and attitudes around it and reconciling the complexity, definition, and divergent views they find within their membership.

“I am seeing REALTOR® associations talking more and more about it, as is NAR, which has had a sustainability task force that's been operational for years,” he says.

For many associations, DeLizia says, sustainability is much like diversity, equity, and inclusion: “It could show up for some as a part of a mission or vision of who we are and who we are seeking to become, it could show up as an operating value, and, of course, it could be an issue with defined milestones and strategies with measures for expected progress,” he says.

DeLizia points out that the planning process itself has become more sustainable because of changes brought about by the COVID-19 pandemic, where the strategic planning world, like so much else, went virtual. Now, his process is typically a smart mix of a daylong in-person session sandwiched between two shorter virtual sessions.

“That creates a significant reduction of resource expenditures—not as much flying, not as many paper handouts, not as much meeting space collateral like bottled water,” says DeLizia. “As I see myself crafting more and more hybrid processes like this, I wonder why we weren't doing this 10 years ago. Why does it take a pandemic for us to really understand what we should be doing?”

GOOD NEWS!

REALTORS® ARE GOOD NEIGHBORS



REALTORS® volunteer in their communities at nearly **3x the national average**. Celebrate your members' giving spirit by highlighting how they uplift others. When you tell these stories of community impact—to consumers, to your members, and to NAR—you show the world that REALTORS® are Good Neighbors.

Be a part of our collective force for good:

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- Launch a local Good Neighbor Award at nar.realtor/gna
- Use hashtag **#RealtorsAreGoodNeighbors** when you post about community service
- Follow us at [@RealtorsAreGoodNeighbors](https://twitter.com/RealtorsAreGoodNeighbors)



Share your story at nar.realtor/rgn



@RealtorsAreGoodNeighbors

Texas Association of REALTORS® celebrated its centennial with an art installation curated with help from the NAR Library & Archives.



Preamble to the Code of Ethics
Under all is the land. Upon its wise utilization and widespread distribution of adequate housing, the building of functioning cities, the promotion of the general welfare and the preservation of the natural resources of the State, and the maintenance of a patriotic duty to which it is the duty of every citizen to contribute. Such interests impose obligations beyond those of ordinary citizenship upon those who, with their fellow REALTORS® a common responsibility for its integrity and honor.
In recognition and appreciation of their obligations to clients, customers, the public, and each other, REALTORS® continuously strive to improve their services and take steps, through enforcement of this Code of Ethics and by assisting appropriate regulatory bodies, to eliminate practices which may damage the reputation of the profession, misappropriate of client or customer funds or property, willful discrimination, or fraud resulting in substantial economic harm, bring such practices to the attention of the appropriate regulatory bodies, and urge exclusion of such individuals from the profession. Realizing that cooperation with other real estate professionals promotes the best interests of those who utilize their services, REALTORS® urge exclusion of such individuals from the profession where their opinion is sought, or where REALTORS® believe that comment is necessary, their opinion is offered in an objective, professional manner, unaffiliated with any particular real estate firm.
The term REALTOR® has come to connote competency, fairness, and high integrity resulting from adherence to a lofty ideal of moral conduct in business relations. In the interpretation of this obligation, REALTORS® can take no safer guide than that which has been handed down through the centuries, embodied in the Golden Rule. Accepting this standard as their own, REALTORS® pledge to observe its spirit in all of their activities whether conducted personally, through associates or others.

THE ASSOCIATION (HI)STORY

TEXAS ASSOCIATION OF REALTORS®

Whether you're celebrating a milestone anniversary or need helpful references on real estate topics, AEs can rely on the NAR Library & Archives to help tell the story.

BY HEATHER MCGOWAN, MLS

In 2020, the Texas Association of REALTORS® celebrated its centennial at its state conference with a 3D art installation commissioned to allow members to click on a piece of TAR history from the past 100 years and learn about that particular point in time.

That unique and meaningful display was made possible with the help of the NAR Library & Archives.

The NAR Archives gathers and documents the history of the National Association of REALTORS® to tell the story of real estate, as well as the stories of the hundreds of associations that are the foundation of the profession across the United States.

Understanding the context and the history of your association in your community is important and valuable knowledge to possess and share. Being able to share and reflect upon your association's history—how it changed, shaped, and contributed to your community—helps you to better serve members and their customers.

Why Stories Matter

When NAR was founded in 1908, the importance of local and state associations was built into the way the association was to operate. The “three-way agreement” became formalized, with each member of NAR required to be a member of the national, state, and local associations. Because of this foundation, the NAR Archives would not be complete without documentation of the activities of local and state associations.

The Archives houses files from every local and state association, including charters, name changes, jurisdiction maps/changes,

constitutions and bylaws, and most official papers from NAR's Membership Policy & Board Jurisdiction divisions. These files tell the stories of how state and local associations came to be, how they changed over time, and how they are contributing to the advancement of their communities and the real estate profession.

Using those files, the NAR Archives is able to create association histories. We take the materials, scan the historical documents, and put together a timeline of the major events of your association. We not only provide you with information about your own association, but also help you find materials and information so you can contextualize those timeline events.

For example, we can share materials about the REALTOR® convention in a particular year. We can browse historical educational materials about how to market and sell properties. We can look through the *National Real Estate Journal* to find articles about real estate in your area. Sometimes we find hidden gems like old MLS listing cards from the 1960s or photographs of a float the association made for a community parade.

In addition to our files, we are always available for a discussion about your historical files. Whether they are in order, in 12 places, or in meticulous scrapbooks, we can help guide you to properly care for those materials, or we can take them out of your hands and use them to give a fuller picture of your history.

As associations, we want to be able to say, “We are the experts on real estate in [insert city, town, county, area, etc.] since [year].” It helps communities understand that not only can a REALTOR® be trusted, but that the association behind the REALTOR® is a



Address 1586 E. Weber Rd. Price \$ 16,000 NE 27150
 Occupied by O. Owner Phone AM3-2141 Possession Date 15
 How shown Call Broker Call Owner Call Tenant Owner O. M. Stichter
 Listing Realtor LUCIUS C. TAY Phone AM3-7080 Salesman _____ Phone _____

Financing Information Conv. or FHA
 Reason for selling Too large, buying smaller Type Property 2 story

FIRST FLOOR THIRD FLOOR EQUIPMENT:
 Liv. Rm. 12 x 22 Fin. Unfin. Range Refrig. Construction Frame
 Kitchen Modern BASEMENT Disposal Floors: Hdw. Pine Taxes 96.00 half
 Dining Rm. Dinette Full Divided Dishwasher Assessments None
 Bedrooms, No. _____ Rec. Rm. Shower Storm Windows Lot Size 40 x 150
 Baths _____ Toilet Lav. Garage 2 Car OFFICE USE ONLY
 Fireplace - Den H.W. Heater Auto Att. Det. Renewed _____
 Bed Rms., No. 3 BLKS TO: On Bus Alley Side Drive Withdrawn _____
 Baths 1 tile 6 Parochial Sch. Heat Gas Conv. Price Change _____
 Churches 3 Stores Roof New Comp. Selling Realtor _____
 Sold For \$ _____
 Terms \$ _____

REMARKS: VERY CLEAN. Extra lot 40 x 150 included. Will sell house without lot at \$15,000.

Address 1586 E. Weber Rd. Type 2 story Age 29 Units 1 Rms. 7 B. Rms. 3 Baths 1 Gar. 2 Price 16,000



Address 2465 Hamilton Ave. Price \$ 14,250 NE 27151
 Occupied by O. Owner Phone _____ Possession Date 30
 How shown Call Broker Call Owner Call Tenant Owner T. F. Coleman
 Listing Realtor LUCIUS C. TAY Phone AM3-7080 Salesman _____ Phone _____

Financing Information Conv. or FHA
 Reason for selling Too small, buying another Type Property 1 1/2 story

FIRST FLOOR THIRD FLOOR EQUIPMENT:
 Liv. Rm. 12 x 16 Fin. Unfin. Range Refrig. Construction Frame
 Kitchen Modern BASEMENT Disposal Floors: Hdw. Pine Taxes 34.00 half
 Dining Rm. Dinette Full Divided Dishwasher Assessments None
 Bedrooms, No. 2 Rec. Rm. Shower Storm Windows Lot Size 50 x 135
 Baths 1 Modern Toilet Lav. Garage 1 Car OFFICE USE ONLY
 H.W. Heater Auto Att. Det. Renewed _____
 Bed Rms., No. 1 large 6 Parochial Sch. Alley Side Drive Withdrawn _____
 Baths 1 Churches 1 Stores Roof Comp. Heat New gas Price Change _____
 Selling Realtor _____
 Sold For \$ _____
 Terms \$ _____

REMARKS: Very clean home. Lots of trees, flowers, shrubs. Outside fireplace. New wiring. 220 in.

Address 2465 Hamilton Ave. Type 1 1/2 story Age 17 Units 1 Rms. 5 B. Rms. 3 Baths 1 Gar. 1 Price 14,250

The NAR Library & Archives offers "hidden gems" like this Columbus, Ohio, MLS listing from the 1960s.

well-established and trusted organization. Since associations tend to be involved in larger ways in our communities and the longevity of those activities creates a social trust, the NAR Archives can play a role in helping to assure community members that they can rely on REALTORS® and the associations behind them to keep the best interest of their homes top of mind.

Research Ready

The NAR Library & Archives is always available to help at your request. It can create an association history, research a tricky real estate topic, or recommend a book about sustainability or managing associations. It's a valuable member benefit for understanding and celebrating not only the history of the National Association of REALTORS® and your association, but also the future of real estate. Contact the NAR Library & Archives at librarians@nar.realtor.

Prepping for Milestone Anniversaries

In 2022 and 2023 alone, more than 200 local and state associations are celebrating milestone anniversaries—that is a centennial, 75th anniversary, or 50th anniversary. Armed with your association history from the NAR Archives, you can take charge and celebrate your association's steadfast nature and longevity as a leader in your community.

Many local and state associations mark the occasion with a gala or celebration event, where they invite members to celebrate the anniversary and witness the installation of the centennial president. For example, in 2021, REALTOR® Association of the Fox Valley in Illinois hosted a gala and installation event where it shared the history of the association, celebrated the recognition the association has received and the service it has been involved in, and gave out association awards for the centennial year. Pennsylvania's REALTORS® Association of Metropolitan Pittsburgh took this even further by holding its event at the John Heinz History Center and placing artifacts from its history on display.

In addition to an event to commemorate their anniversary, many associations have celebrated in other ways. When the Virginia REALTORS® association celebrated 100 years in 2021, it published a coffee table book that tells the history of the association with images—both past and present—of Virginia REALTORS® in their communities. The Vermont Association of REALTORS® celebrated

its 75th anniversary with a legislative reception, where the governor signed a proclamation to declare Jan. 28 as Vermont REALTORS® Day. Similarly, to recognize the centennial anniversary of the Reading-Berks Association of REALTORS®, Berks County, Pa., officially proclaimed March 15 as Reading-Berks Association of REALTORS® Day, and the mayor of Reading presented R-BAR with a commendation recognizing its legacy of public service.

Beyond Histories

Beyond providing association histories, the NAR Library & Archives offers many other valuable services to associations and members. Founded in 1923, the NAR Library & Archives houses the world's largest real estate collection, including a circulating collection of books available for checkout; a 10,000-volume, and ever-growing, collection of e-books; and thousands of serials, journals, and newspapers. Through the EBSCO business research database, the library also offers access to thousands of professional and scholarly journals. Besides specific real estate topics, the library collection includes broader business and interest topics.

In addition, the library continually curates more than 150 reference pages, which give a general overview of a topic and then dive more deeply into articles, resources, and statistics to serve as a "one-stop shop" of information on those topics most important to members and associations. For example, the Sustainability reference page includes NAR's *REALTORS® & Sustainability Report*, articles relevant to sustainability in real estate, tool kits and guides to sustainability, and resources for state and local associations, including education about greening the MLS.

Along with physical and digital collections and resources, the NAR Library is an active research service for members, associations, and staff, providing statistics; recommending books, articles, and websites; or assisting with more in-depth real estate- or association-related research projects.

Shaping the Future

Celebrating the history of NAR—and the history of the associations that make up the backbone of NAR—is paramount to un-

“The NAR library is a one-stop shop of information on topics most important to members and associations.”

derstanding how our associations will shape the future of real estate. As the world seems to change by the day, it is important to ground ourselves in our history and our communities.

I would encourage you to take a look at your history and learn how your association has shaped the past, and then look forward to the ways in which you can lead your association into the future of real estate.



Heather McGowan, MLS, is an archivist and digital preservation librarian at the National Association of REALTORS®.

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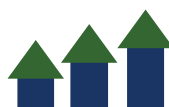


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Under All Is the Land

To steward sustainable communities, there's no better way than a green MLS.

One of the highest callings of a REALTOR® is the “wise utilization [of land] ... for the preservation of a healthful environment.” As champions for homeownership and stewards of our communities, REALTORS® are uniquely positioned to connect their clients to green building practices, making homeownership more affordable, and protecting the quality of life in our communities.

Green buildings are increasingly what consumers are looking for, too. According to the National Association of REALTORS®' 2022 *REALTORS® and Sustainability Report*, over half of REALTORS® surveyed have helped clients buy or sell a home with green features, up from 32% in 2021. In addition, 51% said that their clients were somewhat or very interested in sustainability.

It's more important than ever for REALTOR® associations to educate members—and, in turn, their clients—on the value and accessibility of green building practices. The best way we can make that happen is through the MLS.

Going Green in the MLS: Three Best Practices

In 2008, the ACTRIS MLS was one of the first MLSs in the country to launch data fields that captured energy efficiency, insulation, and green building ratings. We now have 100-plus RESO-compliant data points dedicated to green energy and sustainability in our listing input forms.

Green MLS input fields help us capture the breadth and depth of conservation and sustainability of a property as soon as a listing is entered into the MLS. Within ACTRIS MLS alone, green data points were included in more than 3,000 listings throughout 2021. Our subscribers can search for properties based on criteria

from any of the green input fields and use the historical data from sales to help consumers better price the features of these properties. If you're interested in greening up your MLS, these three best practices can keep sustainability and environmental stewardship top of mind for your members.

No. 1: Standardize Your Data

If your MLS has not yet adopted RESO standards, you should ask why. Along with API integration, data standardization is critical to protecting the value of the MLS in the long term and opening doors for industry collaboration and innovation.

In 2020, ACTRIS transitioned to 100% RESO-compliant data, which ensures that our green data fields align with those of other MLSs across the country. If your MLS is not encouraging members to utilize the RESO green fields, it's important to start that dialogue today so that your agents are better positioned to provide comparable market data for clients with green properties.

No. 2: Educate Your Members

At ACTRIS, we regularly offer continuing education courses that help agents leverage our green MLS fields in their marketing and representation of sustainable properties. During this course, agents dive deep into green MLS fields and green building practices so they can recognize, document, and market green home features. Trainings like this and the NAR GREEN designation give members the opportunity to become proficient in all aspects of green real estate.

If your association doesn't operate its own MLS, partner with others to develop classes, training materials, and client resources. Can you host a panel of affiliate

partners specializing in green building practices? Can you hold a property tour of sustainable building projects? Get creative with your programming.

No. 3: Walk the Talk

As we collectively emerge from the pandemic, every REALTOR® association is rethinking its footprint and how we can better meet our members where they are. If your association is considering an office move, expansion, or remodel, leverage this opportunity to model green building practices and energy conservation methods.

When we set out to build our 35,000-square-foot headquarters and event center eight years ago, sustainability was a core focus. By leveraging solar panels, reclaimed materials, rainwater collection systems, electric vehicle charging stations, low-flow water fixtures, drip irrigation, natural landscaping, and more, our new facility achieved LEED Gold certification, and Austin Board of REALTORS® was named an Austin Green Business Leader by the city. Furthermore, the long-term cost savings and reduced environmental footprint proved to be important points in getting our members excited about the new building.

If you find yourself in Austin, we would love for you to visit our headquarters and tour our LEED-certified building to see our commitment to going green! ■



Emily Chenevert is the CEO of the Austin Board of REALTORS® and ACTRIS MLS, serving nearly 20,000 members and subscribers across the 18-county Central Texas region.



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on the job year-round with
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NATIONAL
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Top of Mind

We dig into some of the tough questions associations are facing right now.

You asked, and we're answering. We know association executives face complicated scenarios every day. Here are two of the recent hot-button questions we've received surrounding membership and Code of Ethics training.

Q: A nonprincipal licensee with ABC Realty is a primary member of an association in a different state. She also has a license in my state, but that license hangs with XYZ Realty, a completely different firm. She wants to join our association under her license affiliated with XYZ Realty. Does her broker need to join our association first, or is this considered a secondary membership?

A: It's important to understand that both membership policy and the Designated REALTOR®, or DR, dues formula are written from the standpoint of an individual belonging to a single firm. When someone belongs to more than one firm, each firm is treated the same, with the exception that the National Association of REALTORS® never expects to be paid more than once. The reasons for this are not arbitrary, as a licensee's eligibility for REALTOR® membership, as well as his or her ethical obligations, run through the supervising broker.

In the above scenario, ABC Realty and XYZ Realty are different firms with different principal brokers, with the licensee working for both. Therefore, if she's looking to join your association with regard to her license affiliated with XYZ Realty, she would not be considered a secondary member with regard to her affiliation with ABC Realty. A principal broker of XYZ Realty would need

to join your association as the Designated REALTOR®, and state dues would be collected, while NAR dues would not.

Keep in mind that a REALTOR® belonging to two separate firms will still only have one M1 number, so inputting this information correctly into M1 can often be tricky. If you need assistance with this, you can always contact 1-800-868-3225 or nrdshelp@realtors.org.

More information on the DR dues formula can be found at nar.realtor/ae/manage-your-association/association-policy/designated-realtors-dues-formula-enforcement-kit.

Q: I've read that only those courses and equivalencies provided by a local, state, or national REALTOR® association can satisfy the Code of Ethics training requirement for this latest cycle, but that local associations can partner with a third-party training provider to create a course that satisfies the requirement. What does partnering with a provider entail, and must my association accept equivalent courses taken from other associations or their partnered providers?

A: Partnering with a provider means a local or state association of REALTORS® has vetted a course provider and confirmed that its course meets NAR's mandatory minimum criteria and learning objectives prior to members taking the course.

Consistent with current NAR policy, members who take a course at a different association of REALTORS® will satisfy the Code of Ethics training requirement.

If members take a course through a partnered provider of an association in their own state or a neighboring state, an association must accept it for the Code of Ethics training requirement. If a course is taken from a partnered provider outside of those limits, it is up to each local association whether it chooses to accept it.

Other Code of Ethics training resources, along with answers to common questions, can be found at nar.realtor/about-nar/governing-documents/code-of-ethics/code-of-ethics-training. ■



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

Ready to Govern Forward?

As a reminder, the date to provide 2023 directors to the National Association of REALTORS® is Sept. 15, a date that may require some adjustments in processes. Failure to meet this deadline will result in forfeiture of those allocated seats. For resources, visit govpag.realtor, or if you have questions about implementation of the Govern Forward changes, please email nargovernance@nar.realtor.

Be Good to People

That's all the motivation we need.

"Be Good to People." These words jumped out at me from an airport kiosk on the way home from a recent visit to an association. I thought to myself, "Well, isn't that it? Yes, that says everything."

With these few words, we can create a sustainable culture and establish a workplace where people feel respected, valued, and heard, and where they know their work is appreciated.

Creating a sustainable culture means we recognize what motivates people. I hope you've noticed I'm using the word "people," because before we are employees, we are people. So, what motivates people? Turns out it's fairly simple.

People want to be in control of their own work—able to make decisions without asking for permission and take responsibility for the outcomes of those decisions. Over the last century or so, many studies were done to see what motivates people and how they respond in various environments. Turns out, when people can solve the problems that come their way on their own—without having to go through a chain of command—they are more connected with their job, even if it's a very routine job.

People also want to belong. Everyone wants to be included in the in-crowd. We all want to be part of something larger than ourselves and to understand how management thinks so that we can attach to it and anticipate needs. When your staff members tell you that they feel like they don't know what's going on, they are really telling you that they don't have the sense of belonging they'd like to have. Sharing information and being in the know helps people understand and connect with organizational goals. Now, you might be thinking, "What happens when



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that person I just hired turns out not to be the person I thought I hired, or when someone who has been a great worker suddenly changes?" We need to remember, "Be good to people." This means giving them a chance to turn things around, helping them understand what the difficulties are, and clarifying expectations.

This starts with putting everything in a business context. If the individual is having unusual interpersonal difficulties, what is

the underlying business matter? It's productivity. So, talk to the individual in terms of how workplace behaviors are inhibiting productivity. Ask how the person can adjust or do things differently so there can be a return to the former productivity. Then, document the conversation in a factual manner in an email. Make sure to include what's not working and what was agreed upon to turn things around. Remember the magic number of three: three conversations spread out over a period of time before taking anything to another level.

Our teams are more stressed than they were several years ago, and the stress level doesn't appear to be decreasing any time soon. Some employees want to continuously grow and learn, and others prefer to be experts where they are. Be mindful of which employee has which desires and provide each person with opportunities as appropriate. This doesn't mean that employees forget the purpose of their job. It just means you're providing them with job enrichment opportunities, but these opportunities are not more significant than their actual job—the first priority.

If you have questions about employee matters or how to create a positive, sustainable culture, please feel free to reach out to me at ckaptur@nar.realtor or 312-329-8311. Most of all, remember to be good to people—and everything else should fall into place. ■



Carole Kaptur, RCE, SHRM-SCP, HCS, GRI, C2EX, is a consultant in NAR's Strategic Association Management Services, Talent Development, and Resources group.

Developing Leaders Requires ... Leadership

Are you the kind of leader you and your members need?

Leadership is critical to associations at all levels, and our members demand it. The problem is, if you want leaders, you must be leaders or be able to point to those who are.

This begs the question, “If leadership cannot be conferred by a title, and it is not something you ‘have’ after completing a class or series of classes, what is it?”

Let’s look at what an icon in management literature says about leadership. Below are Peter Drucker’s 10 traits of a leader, paraphrased for relevance.

- 1. Make sure your objectives and that of the association’s management support the association’s overall mission.** Internalize your mission, culture, vision statements, and strategic plan. They are what you should be saying you are.
- 2. Make a clear list of priorities—your strategic plan—and tackle one at a time.** This improves focus and increases the possibility that something will get accomplished.
- 3. Know how you spend your time and never waste the time of others.** Minimize meetings, traveling to meetings, and sending out irrelevant information.
- 4. Favor the future over the present or past, and focus on opportunities, not problems.** Also, do not become personally invested in something to the point that your ego gets in the way.
- 5. Staff and promote by first gaining clarity around, “What are we trying to accomplish?”** Match people’s strengths with key activities.
- 6. Invite dissent and be confident that important decisions should be controversial.** Acclimation means nobody has done the homework.

- 7. Every decision is an intervention into a system and therefore carries with it the risk of shock.** Consult with those most affected by the change before implementation to mitigate ill effects.
- 8. Don’t blame others when things go wrong.** Accountability and responsibility are the hallmarks of a leader.
- 9. The critical question is not “How can I achieve?” but “How can I contribute?”** Associations are the “organs of society” and require leaders to make a meaningful contribution.

10. Leadership is not defined by a title but instead by example. Walk the walk. For example, great leaders seldom use the words, “I,” “me,” and “my” because the work is never about them—it is about others. This truth played out at a state association meeting to elect three National Association of REALTORS® directors from a field of nine candidates. Below is the actual count of how many times those words were used as each presented the reasons they were worthy of selection, as well as the election results.

I, ME, MY

NUMBER OF TIMES USED	ELECTION RESULTS
24	LOST
18	LOST
13	LOST
12	LOST
9	LOST
6	1 LOST/1 ELECTED
5	ELECTED
4	ELECTED

During my first almost 30 years as a REALTOR®, what the association worked toward seemed inconsistent from one year

to the next. Every time a new president took the helm, there was an entirely new set of priorities, with little connection to those of the previous year. Thus, as the industry changes, the association does not. Over time, this desensitizes the management team to the mission, frustrates potential volunteers, and reduces the number of those willing to serve.

On the other hand, good association leadership obligates those within the senior paid staff, those on the board of directors, and, most specifically, the association’s officers to embrace the strategic plan. This allows for an orderly transition of power because the volunteer leadership never takes the association’s eye off its long-range goals.

My local association executive once presented me with the list of 18 lessons taken from “A Leadership Primer” by Gen. Colin Powell. It, too, has been paraphrased in some instances to fit real estate and is in my office, where I can be reminded of it daily. A few lessons include:

- Being responsible sometimes means making people unhappy.
- When people stop bringing you their problems, you have stopped leading.
- The person in the field is always right and the person back at headquarters is wrong, unless proved otherwise.

Your members—potential leaders—are always watching. Are you the example of the leader you want them to be? ■



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

Unrelated Business, Income, and Tax

Certain activities could put your association in the crosshairs of tax liability.

Over the last two years, REALTOR® associations have remained resilient throughout the COVID-19 pandemic while adapting to the economic pressures of a new normal. This fiscal year, you may be considering ways to pivot, expand, or even monetize certain activities to meet short- or long-term financial goals.

Before you make any decisions, be sure you understand how the IRS treats income generated from unrelated activities of tax-exempt organizations. In general, REALTOR® associations are not-for-profit business organizations that enjoy federal tax exemption. This is a great financial benefit for an association, especially when it undertakes certain activities to expand the association's purpose. But what happens when an association engages in activities not substantially related to its tax-exempt purpose? Will the association continue to enjoy the benefit of federal income tax exemption?

Be aware that when tax-exempt organizations, like REALTOR® associations, engage in activities substantially unrelated to their exempt purpose, the income generated from those activities may be subject to federal income tax liability. This tax liability is known as unrelated business income tax, or UBIT, and may come as a surprise to some, especially if UBIT obligations are not factored into the association's financial projections. To determine whether income generated from a certain activity is subject to UBIT, a REALTOR® association should first determine whether the activity meets the following three-part test:



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UBIT Three-Part Test

1. Is the activity a trade or business?

This is any activity conducted with the intent to make a profit from selling goods or performing services.

2. Is the activity regularly carried on?

This means any activity, conducted with frequency and continuity, pursued similarly to a comparable commercial activity of a for-profit business.

3. Is the activity not substantially related?

This means the activity does not contribute importantly to accomplishing the association's exempt purpose. This will depend on the facts of each case, such as whether the activity is reasonably necessary to perform the association's exempt purpose.

The three-part test is centered around the activity. Whether the association uses the profits derived from the activity does not, alone, make the activity substantially related to the association's exempt purpose.

If an activity meets the three-part test and the gross income derived from the

activity is \$1,000 or more, the association will likely be subject to UBIT and required to file Form 990-T. Unrelated business income must be calculated for each activity that meets the three-part test.

For every rule, there is usually an exception. Generally, royalties, qualified sponsorship payments, certain rental income, and a trade or business where substantially all the work is performed by volunteers receiving no compensation are not subject to UBIT.

As your REALTOR® association considers new or existing activities, remember that the activity must meet all three parts of the test to trigger tax liability. If an activity is conducted as a trade or business and is regularly carried on *but* the activity substantially relates to the association's exempt purpose, then the activity fails the three-part test. The association will likely avoid UBIT on the income generated from the activity.

If your association finds itself generating an excessive amount of unrelated business income relative to its tax-exempt related activities, then your association may want to reconsider its activities to avoid jeopardizing its tax-exempt status. Consulting with qualified legal counsel and tax professionals can ensure that your association's income-generating activities keep you in line to meet fiscal goals, while protecting your tax-exempt status. ■



Maame Nyamekye is a staff attorney with the National Association of REALTORS®.

Sharing Is Caring

Want to offer more member benefits? Consider shared services.

For many organizations, shared services have proven to be a great success, and REALTOR® associations in particular are leaders in the shared services arena.

Shared services help associations expand services and streamline management by creating strategic partnerships. Another key benefit to sharing services is helping associations meet Core Standards requirements of the National Association of REALTORS®. With no association jurisdiction boundaries to shared services, technology is also allowing us to look at shared services on a nationwide level.

It's different from outsourcing with third-party vendors, with the added cost for those. Its positive aspects include reductions in cost, time, and staff effort. Shared services also create partnerships with like-minded associations and organizations, such as educational institutions. Ultimately, shared services bring a higher level of service to all members with better quality of trainers, instructors, education, and programs. For example, NASA's Kenneth Newton noted in a 2014 article for *The EvoLLLution* that the 2006 switch to a shared services model at NASA is realizing nearly \$20 million in savings annually.

Illinois REALTORS® offers shared services for professional standards, including hearings, an ethics citation program, mediation, and ombudsman services. Local associations partner with the state association to offer the best professional standards services for members and clients. This saves time and money for the local association and provides a more efficient and well-rounded program in regard to ethics and arbitration proceedings.

"There are several advantages to local associations using the services offered by

Illinois REALTORS®," says Becky Carraher, director of ethics and professional standards for Illinois REALTORS®. "Besides the cost savings, it centralizes the professional standards process; the state association has a pool of trained members to use as an ombudsman, hearing panel member, or mediator; and there are dedicated full-time staff to address issues as they arise."

Illinois REALTORS® also provides governmental affairs directors for local associations. The GADs each represent more than one association and work together as a team to provide exceptional services in the advocacy arena. For example, Neeley Erickson, a local GAD for the state association, offers REALTOR® Reads, a series of live events—either online or in person. The series aims to empower attendees with skills to battle bias, champion diversity, and discuss uncomfortable truths, with the ultimate goal of furthering fair housing and diversity, equity, and inclusion. No matter where they live, Illinois REALTORS® can attend the hybrid book club/speaker series, which is sponsored by a local partnering association.

One of the best shared services that members and their clients benefit from is the MLS. For example, Midwest Real Estate Data, or MRED, is a regional MLS in Illinois that partners with 16 local associations and serves nearly 50,000 real estate professionals, with listings throughout northern Illinois, southern Wisconsin, northwestern Indiana, and Iowa. "Sharing services can be a win-win for associations," says Jon Broadbooks, chief communications officer, MRED. "Certainly, such agreements have the potential to save money, but more important is the opportunity to enhance a member's experience with the association.

"It's hard for any association to be an expert on everything. As the real estate business becomes more complex, sharing services can provide added expertise to match a fast-changing world. These agreements really can magnify an association's impact and relevance for its membership."

Associations that work together with shared services can save time and the cost of duplication of services. Why not benefit from programs that other associations have already developed? Or, if you have a great program, consider offering the service to other associations. Association executives with success in shared services are open to collaborating to create successful partnerships, benefiting all members of each association or organization involved. It makes them stronger, more efficient, and more effective overall. Together, we are better! ■



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For More

The National Association of REALTORS® has made available a Shared Services Toolkit, which can be found at nar.realtor/ae/manage-your-association/shared-services. Case studies are also available at nar.realtor/ae/manage-your-association/shared-services/case-studies.

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The Value of ‘Why?’

For Bob Hart, that one question has helped drive sustainability for his association.

Bob Hart’s favorite question might be, “Why?” As CEO for the Santa Barbara Association of REALTORS®, Hart, RCE, was reviewing the association’s water bill when he glanced outside at its lush, green lawn. He realized the association could save water and maintenance costs, while redirecting that money to the membership, by making just a few changes.

SBAOR’s demonstration garden of drought-tolerant plants has reduced monthly water usage by 75% and has resulted in a significant savings of member dues dollars.

REALTOR® AE talked to Hart about the value of “why,” how sustainability is now a natural part of his association’s culture, and making his mark on the profession.

Q: Can you share your other sustainability wins?

Hart: What I’d like to address is resource management: How can we do a better job of accomplishing our goals while using fewer resources, remembering that our resources are not just material things but also include money and time?

Since we are in a drought area, our first efforts were on water conservation, but then we looked at our use of electricity. Did all the lights need to be on all the time? We replaced all incandescent bulbs with LEDs, then reconfigured the fluorescent fixtures—more than 100 bulbs. Not only did we reduce the electric load from 160 watts per fixture to 14 by going to LED, but it also eliminated the flicker and buzz of the fluorescent tubes—a much nicer environment for our staff and members.



SANTA BARBARA ASSOCIATION OF REALTORS®

Q: How much in savings have you realized?

Hart: Here’s just one example: Knowing we had reserves in the bank at less than 0.5% interest per year, we realized we could get a much higher return by investing in a solar photovoltaic system. We had been paying roughly \$1,000 per month for electricity. With our solar system in place, we now pay less than \$100—and while closed for the COVID-19 pandemic, the electric company paid us! Saving \$900 per month works out to a return on the \$56,000 investment of over 19% per year—a significant improvement over the \$280 per year we would have earned leaving it in the bank.

It is also important to realize that at 5.5 years, our system was completely paid for, yet our monthly savings continue and will actually increase as electric rates rise.

With our expenses down, it gives our board of directors more latitude when they do have programs that they want to implement. Most importantly, we have not had a dues increase in at least 15 years due to properly managing our members’ money.

Q: You’ve also successfully advocated for greater professionalism. What advice would you offer to other association executives?

Hart: A very simple action is to stop calling what our members do an “industry.” REALTORS® do not make things; they are not industrial. They are professional. If we all refer to the real estate “profession” instead of the real estate industry, it can lead to our members seeing themselves as professionals and therefore acting more professionally.

Q: How have you stayed motivated to make big changes happen?

Hart: For anyone who doesn’t like change, we just remind them, “Nothing can be improved upon if it isn’t changed.” Why would we want to remain stagnant if we have an opportunity to make things better? I’ve also learned that it is much easier to get buy-in when the board of directors comes up with the idea. I do my best to provide information so they can come to the conclusion that something needs to be done, such as investing in solar.

Q: What’s one challenge that you’d like to see AEs take on?

Hart: I encourage every AE to analyze their use of resources—in other words, ask “Why?” Do you need to print everything? If so, are you using both sides of the paper? How long has it been since you reviewed contracts for your phones, copier, alarm system, trash, etc.? I was shocked at how much of our members’ money I have been able to save because I looked at alternatives. ■

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