

# How to Share Executive and Administrative Services

**Yakima Association of REALTORS®**

**Yakima, Washington**

**Jeannette Biddle, Former EO**

**Case Study Source: National Association of REALTORS®**

In this case study, a small board (300 members) provides executive services for two smaller neighboring boards (100 and 50 members, respectively).

The Executive Officer of the Yakima Association of REALTORS® provides executive staff services for the Lower Yakima Valley Association of REALTORS® (50 members) and the Kittitas County Association of REALTORS® (100 members). The two smaller associations each pay a fee to the Yakima Association.

The relationship with the Lower Yakima Valley Association evolved from NAR professional standards mandates regarding the minimum member pool for appointing a hearing panel. The Lower Yakima Valley Association executive oversees grievance matters for the Board, including training classes. The Yakima Association takes over the process once Grievance sends it on. The Yakima Association also presents member orientation programs for the Lower Yakima Valley Association and charges a \$10-per-head fee.

The relationship with the Kittitas County Association started with provision of professional standards services and has expanded to other services, such as newsletter publication, communication facilitation with the state and national

associations, bylaw compliance, new member orientation, and access to staff and legal counsel. The service agreement fosters an amicable relationship, as the smaller board is able to maintain its identity and control over local market issues. Kittitas pays a fee for these services.

As a side benefit, the service relationships have fostered networking among the members of all three organizations. The three boards caucus together at state association meetings and include each other in their social events and functions.

It took about a year to define the service package, negotiate the agreements, and implement service provisions. In developing the service contracts, the executive officer stressed the importance of clearly defining the time commitments, keeping track of hours worked on behalf of the other organizations, and building flexibility into the contract so that the scope of the time commitment can be adjusted or canceled with agreed-upon advance notice.

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## Greater Fairfield Board of REALTORS®

Fairfield, Connecticut

Fran Cormier, EO

For over ten years, staff at the Greater Fairfield Board of REALTORS® has been serving as staff for the Newtown Board. When the smaller Newton Board no longer had a physical location for their office, they began using the Greater Fairfield Board's address.

The Greater Fairfield chief staff executive stepped in to assist the Newtown Board with executive and administrative services. These include attending Board of Director meetings, writing weekly newsletters, and coordinating membership meetings and continuing education courses. The chief staff executive also oversees dues collection and new member orientation, as well as any other business that arises.

The arrangement has been beneficial to both associations. For the Greater Fairfield Board, it is a source of non-dues income and keeps the dues for their members from increasing. It has also allowed the Newtown Board to remain a separate organization, proving successful with the help of very involved leadership.

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Texas Association of REALTORS®

Austin, Texas

Travis Kessler, CEO

Since January 1995, the Texas REALTORS® have provided a Multi-Board Management Program, built around the Organizational Standards set by the National Association of REALTORS®. The program serves 15 associations, each of which has fewer than 250 members.

The program offers various services related to the management of local associations of REALTORS®, such as:

- Education Session Coordination
- Dues Billing/Collection
- Bookkeeping Services
- Multiple Listing Services (MLS)
- Government Relations Services/Political Affairs
- Legal Counsel
- Assistance with NAR Core Standards Compliance
- Professional Standards Services
- Records Maintenance
- Minutes Preparation

Webinars are conducted to inform the multi-board associations of updates, conduct trainings in areas such as finances, parliamentary procedures, TREPAC fundraising, etc., allowing staff to fortify the rapport with associations that are located throughout the state of Texas.

In order to standardize procedures and allow staff to operate efficiently, associations must enter a yearly agreement that further details the services provided by the program. The multi-board associations don't house local staff, therefore, we collectively serve the people.

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## Jefferson-Lewis Board of REALTORS®

Watertown, New York

Lance Evans, CEO

The Jefferson-Lewis Board of REALTORS® in upstate New York has been providing executive and administrative services for the neighboring St. Lawrence County Board of REALTORS® since 2001. Services include: executive officer involvement; member data POE; Professional Standards training and administration; phone line support; MLS oversight and support; and continuing education courses. In addition, a part-time staff member of the Jefferson-Lewis Board dedicates most of her time to support the St. Lawrence County membership.

Prior to contracting with the Jefferson-Lewis Board, the St. Lawrence County Board tried to “go it alone” to meet the minimum service criteria. First, they contracted with a local housing council for professional services; an arrangement that was terminated when the local council obtained a major program grant and, as a result, was no longer able to provide the services. Efforts to hire through a temporary help agency as well as hire an independent contractor were unsatisfactory, primarily because no one was available to train the new staff.

Jefferson-Lewis Board members who were involved in real estate transactions in the other board's territory saw a critical need for greater coordination of the St. Lawrence County Board's activities.

Since the Jefferson-Lewis Board was already providing POE member data services, it seemed a natural progression to propose a broadened package of services. The Jefferson-Lewis Board's first proposal was turned down, but within a year, when the St. Lawrence County's experience with temporary help proved unsatisfactory, a second proposal was made and accepted. Personal networking relationships and lots of informal preliminary discussion facilitated formalization and implementation of the agreement. Merger was not an option either board wanted to attempt; the St. Lawrence County Board wanted to maintain its own identity, and the Jefferson-Lewis Board did not want to get involved in the paperwork and complications of working out a merger. Geography does not favor a merger because although the St. Lawrence Board is small in terms of number of members, its territory is one of the largest in the state, with some members as far as 100 miles from the Board office.

The Jefferson-Lewis Board EO meets monthly with the St. Lawrence County Board of Directors. He also travels to the Board to conduct Professional Standards training and hearings. He carries a copy of all of the Board's records and forms on a laptop computer for quick access. For example, at professional standards hearings, there is no delay in processing paperwork because forms are completed electronically during the hearing and printed out on site.

The St. Lawrence County Board members have experienced an increase in value for their dues dollars. They now have well-coordinated board activities and, with phone line support, they can talk to an "actual person" instead of leaving a voicemail message and hoping for a timely callback. Jefferson-Lewis Board members are pleased with the enhanced professionalism that has been fostered by the agreement. Networking relationships between the Boards' members are promoted through joint meetings and social events. Communications between the state and national association have been improved for the St. Lawrence

County Board, as they now have professional staff who can alert members about important issues and explain the impact.

In order to make the time commitment necessary to provide the executive services for the other Board, the Executive Officer reported that it was really necessary to take a look at the tasks he was performing and delegate some to other staff. He recommended “taking a look at the tasks you are doing, questioning why *you* must do the task, and then train other staff to take on those tasks.”

In developing procedures for the other board, he recommended putting aside the assumption that what works in one board will work in the other. It’s best to examine both boards’ procedures, get input from members and staff, and develop new ways of doing things.

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