

PLANNING TOOLS FOR CORE STANDARDS



#NARLEADERSHIPSSUMMIT





STRATEGIC PLANNING AE REVIEW

WE'LL HELP TAKE YOU FROM THIS . . .



TO THIS . . .



HOW?



BY GIVING
YOU TOOLS TO
REVOLUTIONIZE
YOUR PROCESSES!



STRATEGIC PLANNING



STRATEGIC PLANNING TOOLKIT

The screenshot shows a web browser displaying the National Association of Realtors' Strategic Planning Resources Toolkit. The page features a navigation menu with categories like News, Blogs & Videos, Research & Statistics, Member Benefits, Education, Events, Political Advocacy, Law, Ethics & Policy, Business Specialties, and About NAR. The main content area is titled "Strategic Planning Resources Toolkit" and includes a welcome message, a list of benefits, and a section for exploring the toolkit. A sidebar on the right lists "Most Popular" articles such as "NAR Code of Ethics Training for..." and "Housing Affordability Index".

HOME Welcome, Donna Sign Out My Account Search Powered by Google GO
Topics | Programs | Directories | Apps | Videos | Store
Pay Dues AE | NRDS
News, Blogs & Videos Research & Statistics Member Benefits Education Events Political Advocacy Law, Ethics & Policy Business Specialties About NAR
TOOLKIT HOME
STRATEGIES AND METHODOLOGIES
FACILITATORS
IMPLEMENTATION
GLOSSARY
Strategic Planning Resources Toolkit
Welcome to the Strategic Planning Resources Toolkit.
This toolkit will:

- familiarize you with the strategic planning process
- provide resources for you to pursue strategic planning at your association
- help you decide whether you'd like to complete the process on your own, or with the guidance of a facilitator

Benefits of Strategic Planning
The results of strategic planning will be invaluable:

- Your association will work to develop a clear vision for its future, as well as a clear path for its immediate needs.
- You'll learn where to allocate staff and financial resources.
- You'll have a tangible road map to guide you as you make association management decisions on behalf of your members.
- You'll be able to create a [value proposition statement](#) for your association.

Explore the Toolkit
The toolkit contains three sections:

- Strategies and Methodologies
- Facilitators
- Implementation

The glossary defines *key performance indicators (KPIs)*, *needs assessment*, and other common terms used in strategic planning

Curb appeal ...

Most Popular
NAR Code of Ethics Training for...
Housing Affordability Index
2016 is the Year to Complete Code...
AE Jobs Page Lists Nationwide...
Tight Supply Curbs May Existing...

Help us improve the site

AT YOUR
FINGERTIPS!

[HTTP://WWW.REALTOR.ORG/AE/MANAGE-YOUR-ASSOCIATION/STRATEGIC-PLANNING-RESOURCES-TOOLKIT](http://www.realtor.org/ae/manage-your-association/strategic-planning-resources-toolkit)

STRATEGIC PLANNING TOOLKIT

Resources and Guidance on:

- How to identify member needs
- Establishing performance measures
- How to find a facilitator
- List of NAR – approved facilitators

PLANNING AND ACCOUNTABILITY

Lead to **SUCCESS!**



PHASE I – RE-EVALUATE

DAVE PHILLIPS' (PA AOR CEO) – RE-EVALUATE EVERY PROGRAM/SERVICE EVERY YEAR

SACRED COW BBQ CHECKLIST

- What was the original purpose of this program/service?
- Has the purpose or circumstances related to this program/service changed?
- What other options are available for fulfilling this member need?
- Is this program/service called for in our Strategic Plan?
- Should we continue this program/service, or are our limited resources better spent elsewhere?



PHASE II – HOW?

Set **SMART** Goals and Objectives that align with your Strategic Plan

Specific

Measurable

Attainable

Results focused and relevant to the mission

Timely



PHASE III – WHO/WHEN?

- Identify **WHO** is accountable;
WHEN tasks are to be completed
- Accountability –
– CEO, staff, and/or committees
- Write it down
- Set milestones
- *Check in – Follow up!*



PHASE III – WHO/WHEN?



Mission:	Initiatives – “What” needs to be done	Action Plan – “How” it’s going to get done	Start Date	Due Date	Status	Timeline Resources Performance (Notes)	Accountability – “Who” is responsible? (Sets CEO, Staff and Committee Goals)
Brand Identity	VALUE PROPOSITION / DEFINING CORE SERVICES						
	1. Develop Member Benefit Brochure to promote our Value Proposition	Define the values and develop the value proposition, clearly delineating the value of the programs and services offered	1/16/17	2/20/17		3 Months Graphic Designer Printer Brochure and Collateral Material	Communications Committee and MarCom Staff

Excellent tracking tool for AE performance review

SCORECARD IS YOUR “VALUE PROPOSITION”

- Records year’s accomplishments
- Sets Staff and Committee goals
 - Report to BOD/Membership meetings – “Value Proposition”
 - *If Committees do not reach their goals, what action can be taken?*
 - AE Performance – were goals met?
 - Promote during dues billing – What have you done for me lately?

NEW INITIATIVES/UNFORESEEN ISSUES

- As much as you try, you can't plan for everything
- Legislation
- Policy
- Membership shifts/numbers or focus
- Personal agendas



“IF IT DOESN'T ALIGN, DON'T
WASTE YOUR TIME.”

Donna's rule to live by!

HOW?



New Program Justification Form (Jim Peters, former AE for SC AOR)

Q1	Have members indicated a need for the program?	Yes	No
Q2	Do we have the capacity to put on the program with existing resources and if not what resources need to be added?		
Q3	What will our position be if we do or do not offer this program?		
Q4	Will the program strengthen or weaken our relationship with Large Firms and Stakeholders?	Strengthen	Weaken

NEW PROGRAM JUSTIFICATION FORM

- Is someone else currently doing this?
(Why reinvent the wheel?)
- Can we form a partnership – other Association, external organizations
(Chamber of Commerce, University, etc.)
- What's the cost?
 - Staff time **AND** hard dollars?

NEW PROGRAM JUSTIFICATION FORM

- If no alignment exists
 - Determine whether the initiative could be a potential future initiative and discuss at next planning session
 - Dismissed
- *Needs Leadership/BOD support to ensure process is followed*

CEO REVIEW



CHIEF STAFF PERFORMANCE EVALUATION TOOLS

The screenshot displays a web browser window with the URL <http://www.realtor.org/ae/manage-your-association/human-resources-toolkit/chief-staff-performance-evaluation>. The page features the National Association of Realtors logo and navigation links such as Home, Pay Dues, and Sign In/Register. A main navigation bar includes categories like News, Blogs & Videos, Research & Statistics, Member Benefits, Education, Events, Political Advocacy, Law, Ethics & Policy, Business Specialties, and About NAR. The page title is "Chief Staff Performance Evaluation". The main content area explains the importance of evaluating the chief staff executive and provides a list of reasons for conducting a formal evaluation. A sidebar on the right lists related content under "In this section" and "Related".

Chief Staff Performance Evaluation

The most important job of any volunteer board of directors is to hire, work with, and evaluate the chief staff executive.

Why conduct a formal evaluation for the chief staff executive?

An annual performance evaluation of the chief staff executive:

1. provides a platform for the board and the chief staff executive to discuss shared expectations;
2. helps the chief staff executive and the association develop and grow; and
3. is required by the REALTOR® organization's insurance policy that covers wrongful termination lawsuits.

Because each association is unique, developing a single standardized evaluation tool is impractical. However, you can use the information in this section as a blueprint for developing an evaluation process that works for your organization.

In this section

- HR Toolkit Home
- Chief Staff Performance Evaluation Home**
- Getting Started
- Process Guidelines and Considerations
- Process Scenarios
- Sample Evaluation Forms

Related

- HR for Associations

AT YOUR
FINGERTIPS!

[HTTP://WWW.REALTOR.ORG/AE/MANAGE-YOUR-ASSOCIATION/HUMAN-RESOURCES-TOOLKIT/CHIEF-STAFF-PERFORMANCE-EVALUATION](http://www.realtor.org/ae/manage-your-association/human-resources-toolkit/chief-staff-performance-evaluation)

WHY CONDUCT A REVIEW?

- They can't fix what they don't know
- Sets priorities
- Clear expectations
- Need feedback
 - Not just the negative
- Compensation/bonus considerations

WHO?

- AE should know who's responsible for conducting the review
- Typically, leadership
 - Immediate Past President
 - President
 - Secretary
 - Treasurer

HOW?

- In writing
- In private
- Gauge performance based on the Strategic Plan
- Use evaluation forms available in the Toolkit
 - 3, 4, 5 point scale
 - Summary
- Confidential
- AE should be given the opportunity to comment

NO SURPRISES

DISCUSSIONS/FEEDBACK
SHOULD BE ONGOING



WHEN ALL ELSE FAILS...



**KEEP
CALM
AND
THINK
S.A.M.**



YOU'RE NEVER ALONE . . .

Your Strategic Association Management
(S.A.M.) Advisors *to the rescue!*



Donna Garcia (dgarcia@realtors.org)

312/329-8311

OR

Kelsi Dunn (kdunn@realtors.org)

312/329-8518

(Staff recruiting/Compensation Analysis)

YOU'RE NEVER ALONE . . .

Your Strategic Association Management (S.A.M.) Advisors can help you:

- Develop your Strategic Plan
- Conduct Strategic Workforce Planning
- AE/Staff Recruiting
- Compensation studies
- And more



STRATEGIC ASSOCIATION MANAGEMENT (S.A.M.) SERVICES



Let's Connect! (For AEs and Staff)



**Strategic Association Management
(S.A.M.) Group**



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THANK YOU

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