PLANNING TOOLS FOR CORE STANDARDS

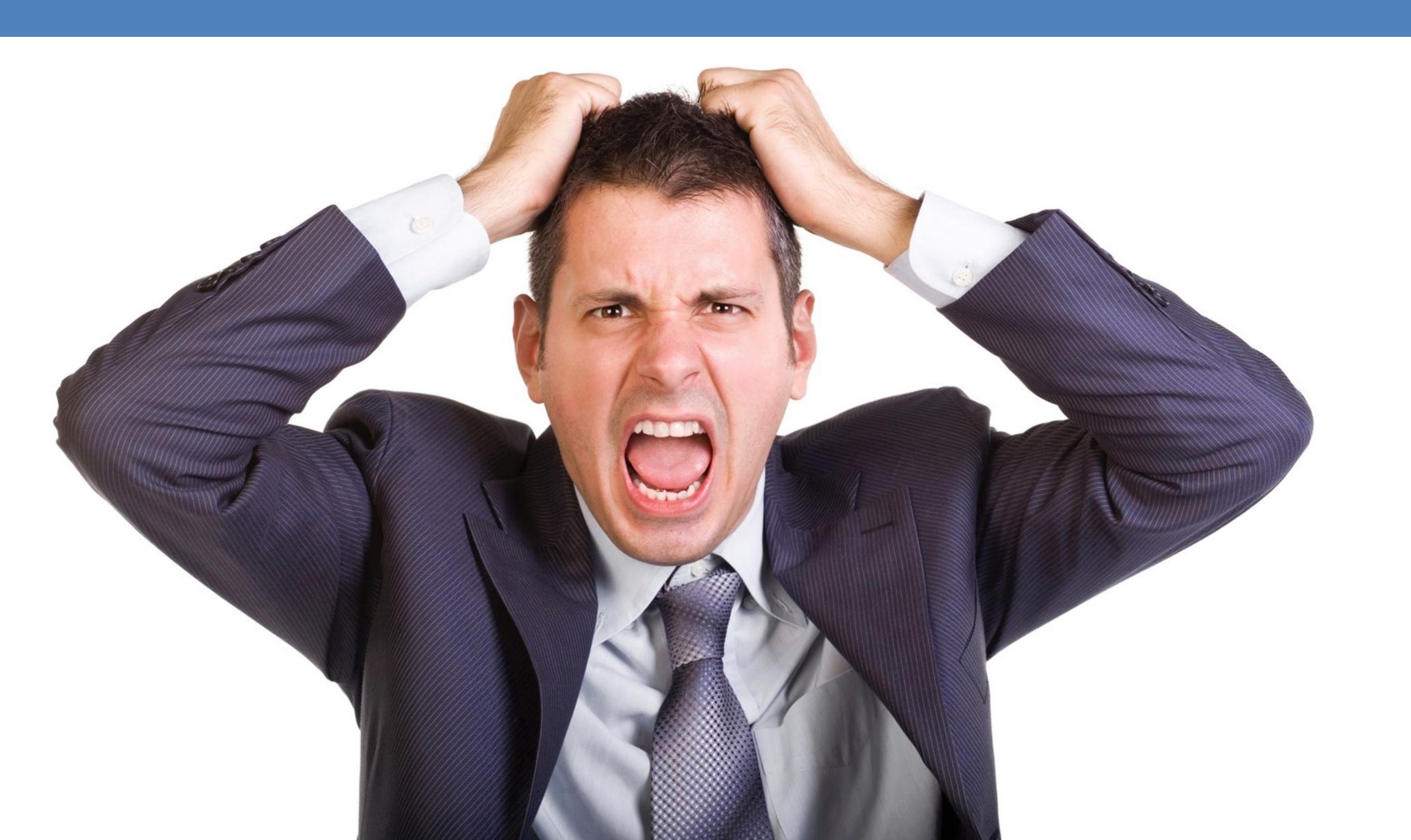








WE'LL HELP TAKE YOU FROM THIS . . .





TO THIS...





SWOOD HOLLINGS

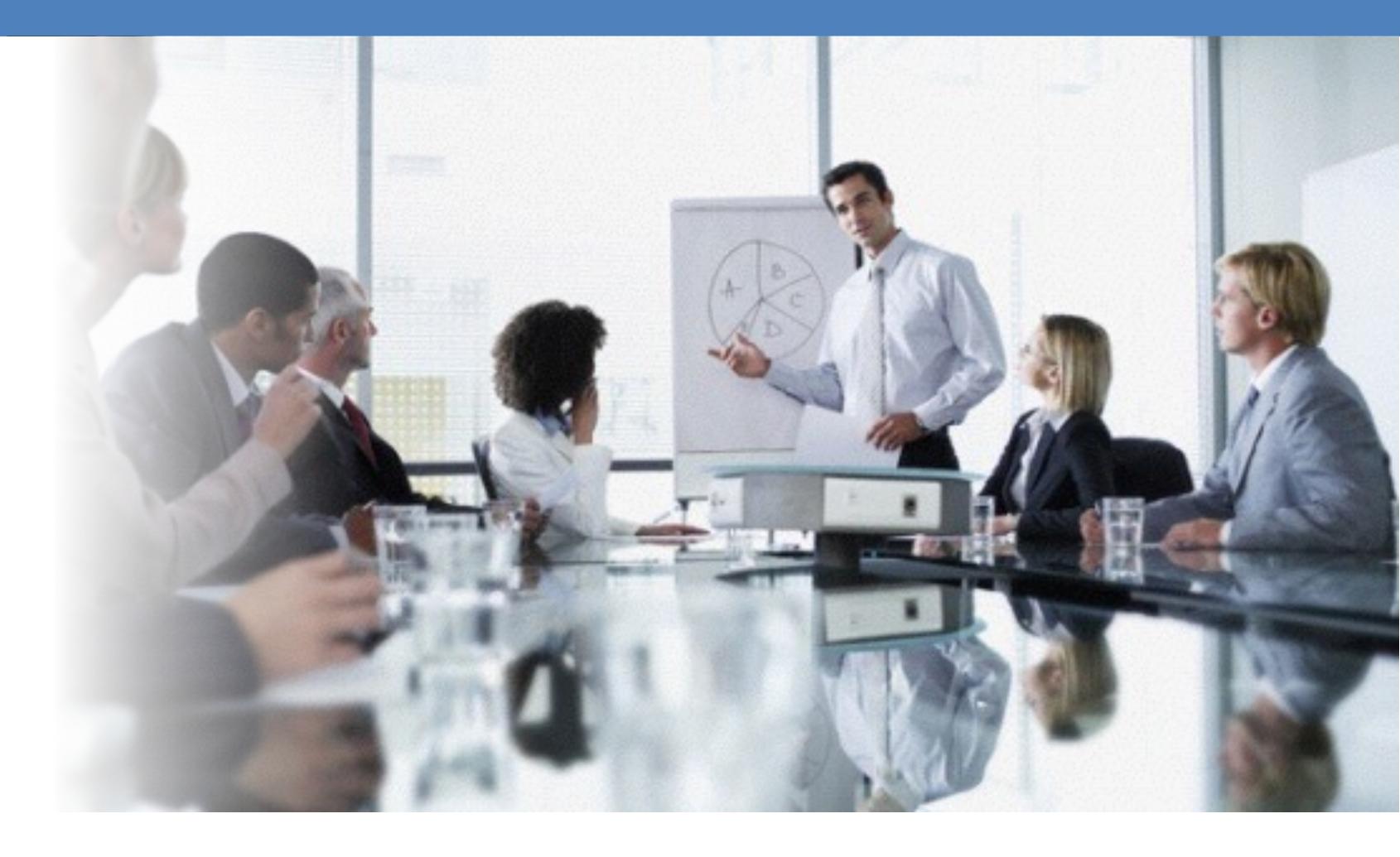






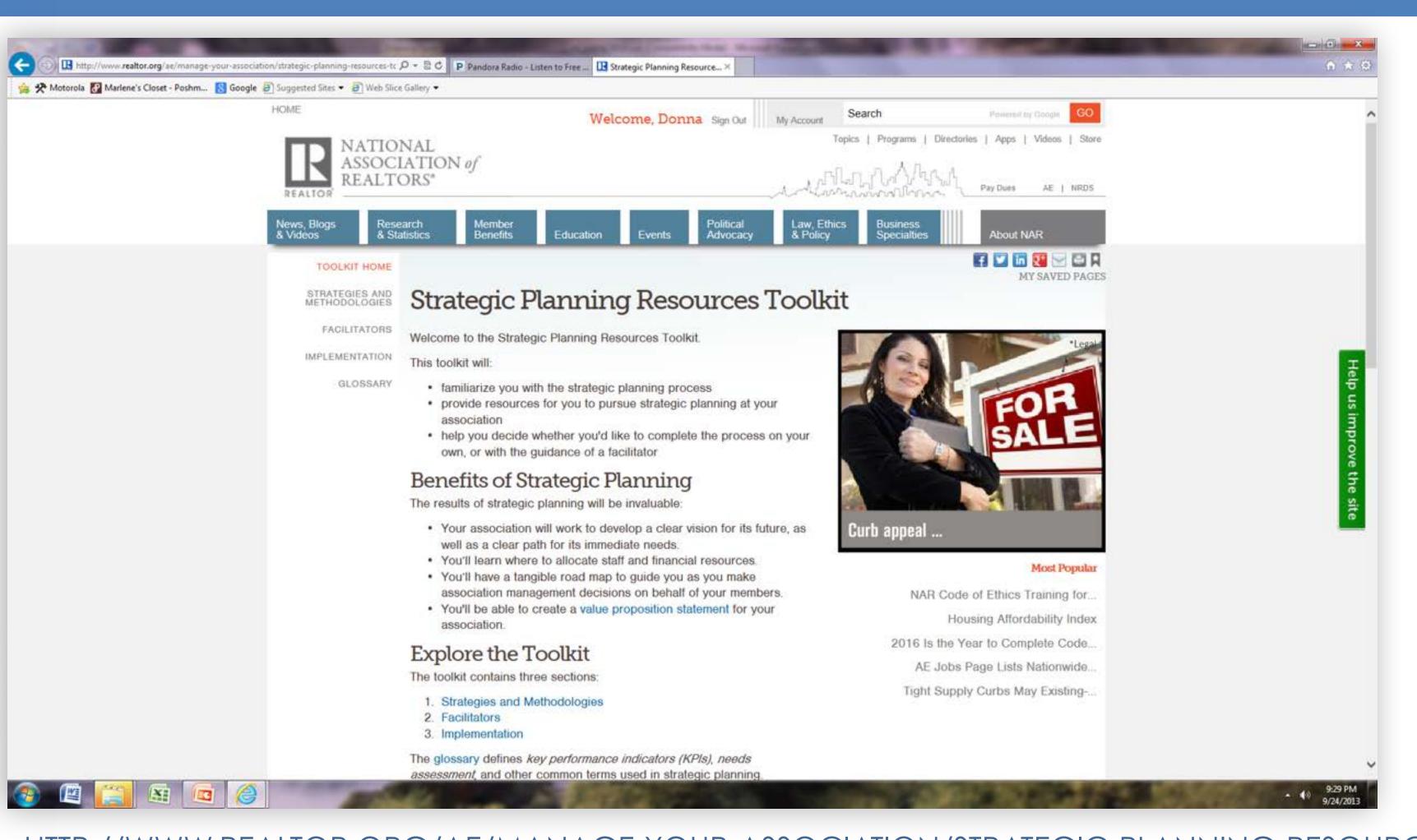


STRATEGIC PLANNING





STRATEGIC PLANNING TOOLKIT



AT YOUR FINGERIPS!

HTTP://WWW.REALTOR.ORG/AE/MANAGE-YOUR-ASSOCIATION/STRATEGIC-PLANNING-RESOURCES-TOOLKIT



STRATEGIC PLANNING TOOLKIT

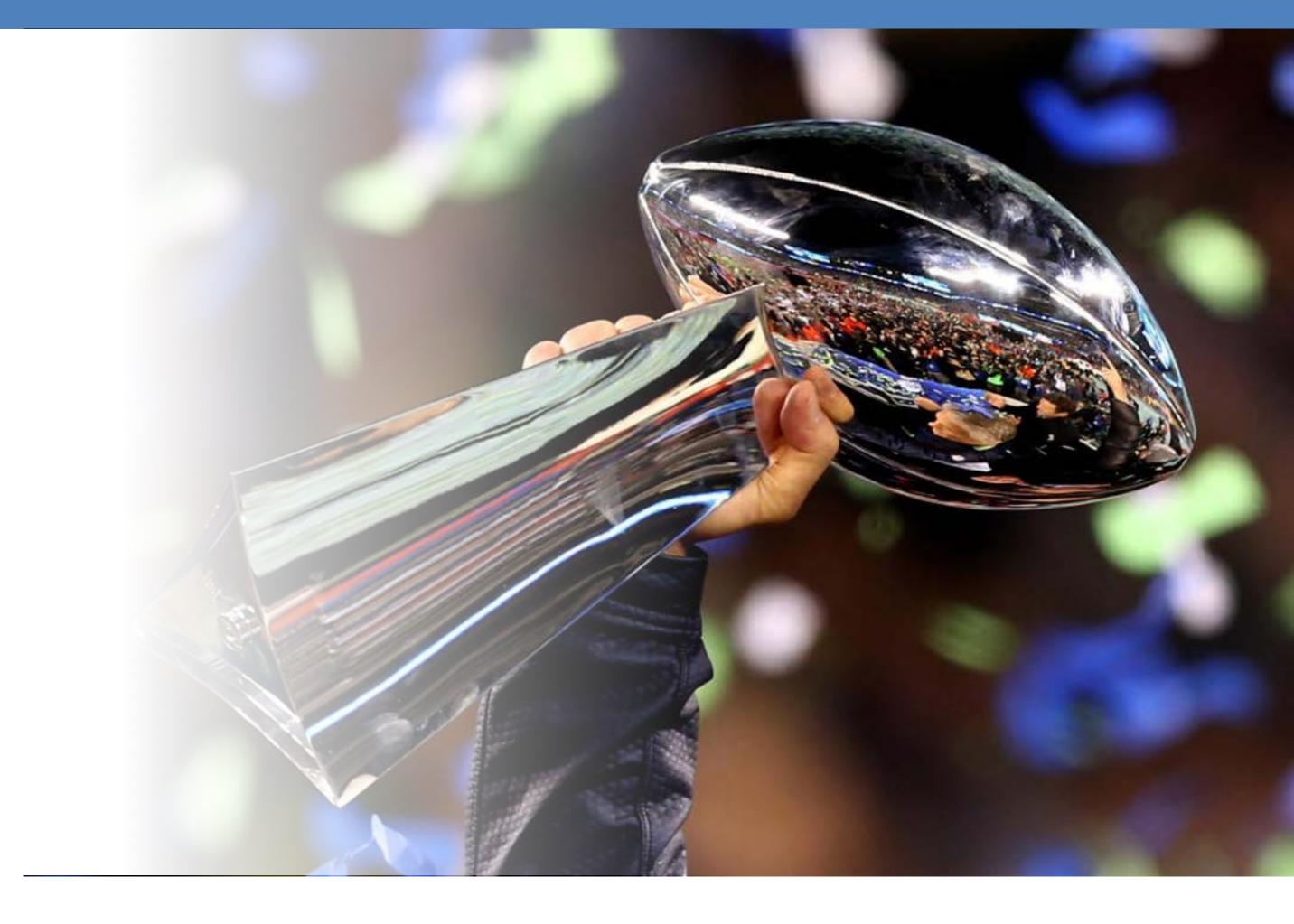
Resources and Guidance on:

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



PLANNING AND ACCOUNTABILITY

Lead to SUCCESS!





PHASEI – 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

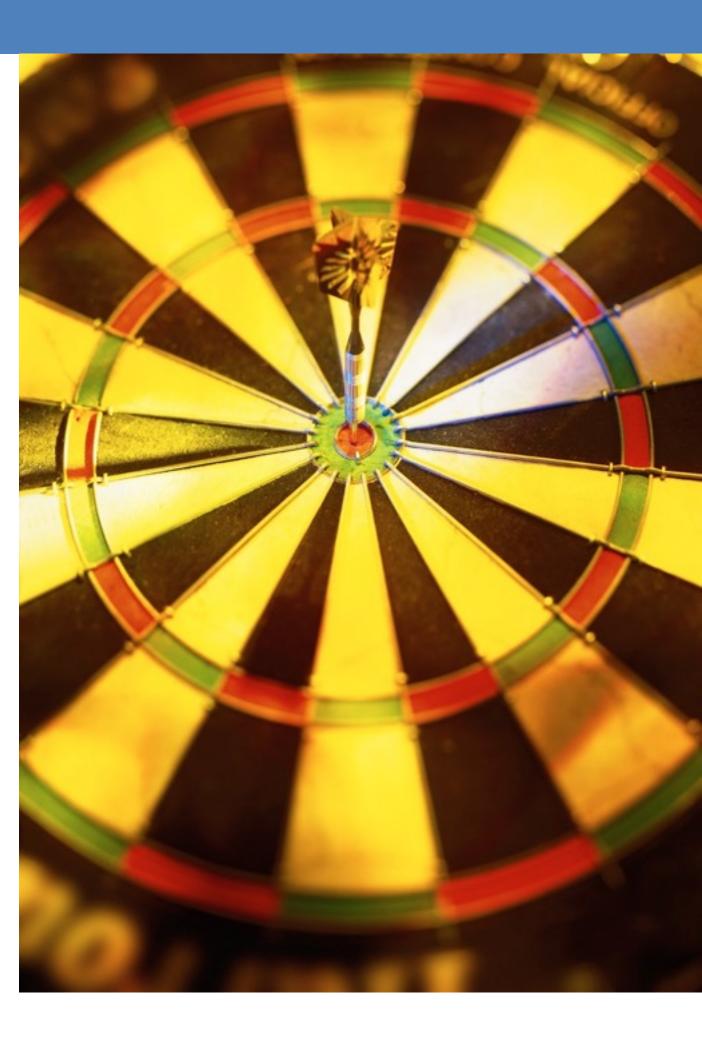
Specific

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!



SWOOD H



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 stregthen 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

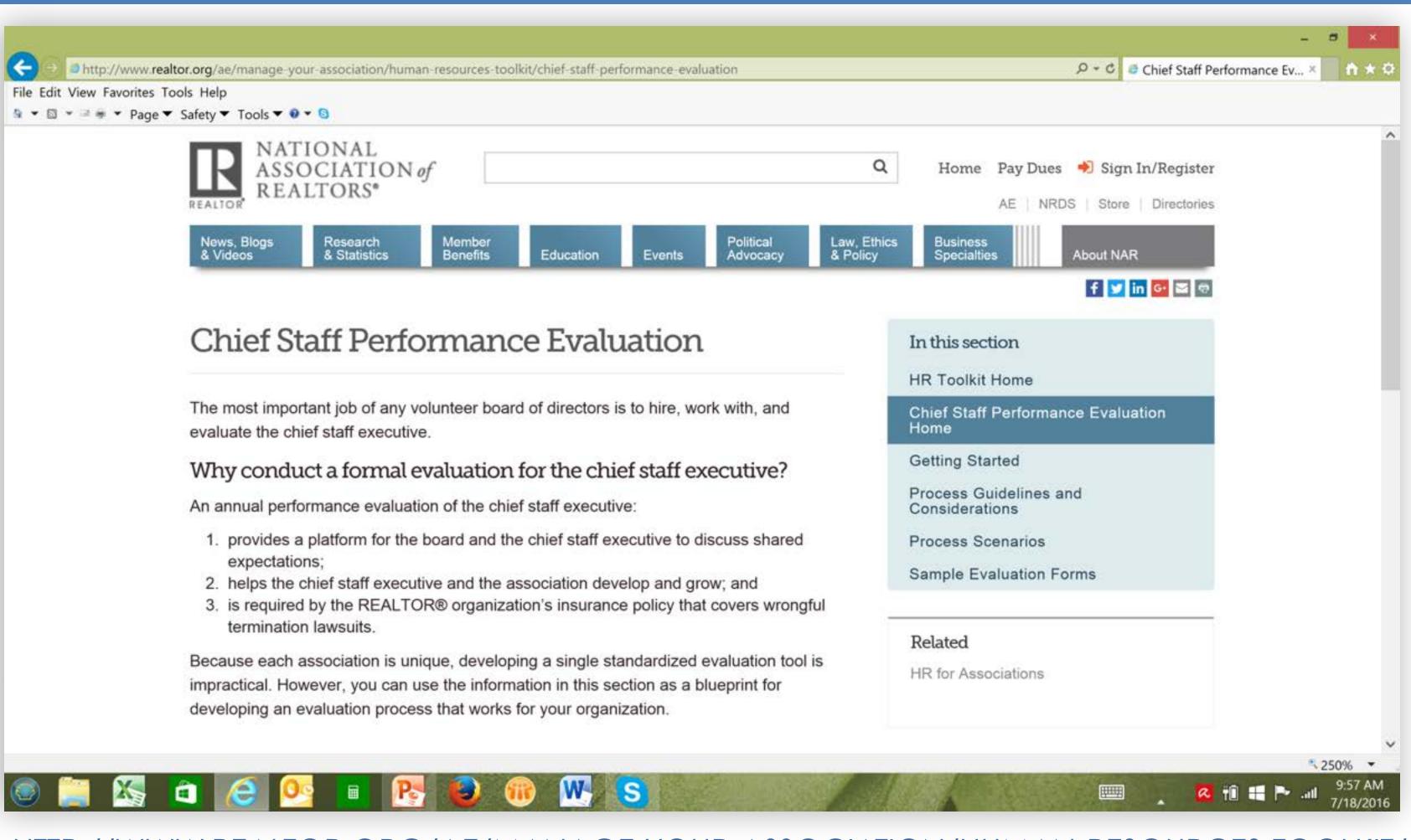


CEO REVIEW





CHIEF STAFF PERFORMANCE EVALUATION TOOLS



AT YOUR FINGERIPS!

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





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

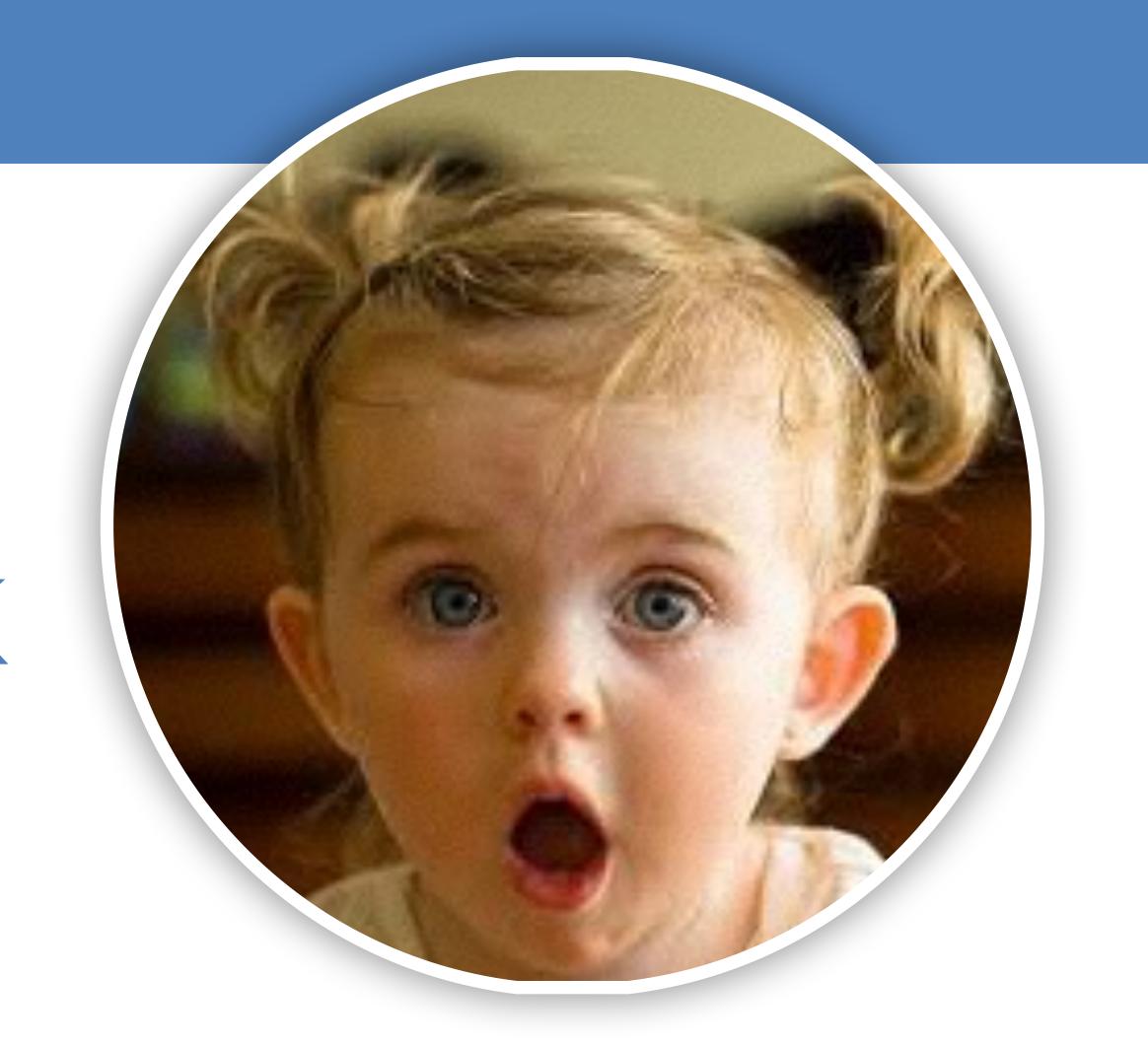


- In writing
- In private
- Gauge performance based on the Strategic Plan
- Use evaluation forms available in the Toolkit
- 3, 4, 5 point scale
- Summary
- Confidential
- AE should be given the opportunity to comment



NO SURPRISES

DISCUSSIONS/FEEDBACK SHOULD BE ONGOING





WHEN ALL ELSE FAILS...







YOU'RE NEVER ALONE...

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



Donna Garcia (dgarcia@realtors.org) 312/329-8311

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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@hrbizpartner



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Strategic Association Management (S.A.M.) Group https://www.facebook.com/groups/AssociationExecs





STRATEGIC BUSINESS PLANNING FOR BROKERS

Let's Connect!



Invite your Brokers to:

Strategic Business Planning Group for Brokers https://www.facebook.com/groups/REBrokers/

and







THANK YOU



REVOLUUTION 2016 LEADERSHIP SUMMIT

