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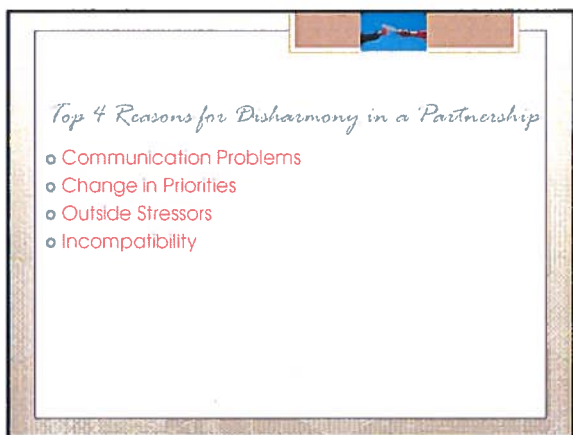
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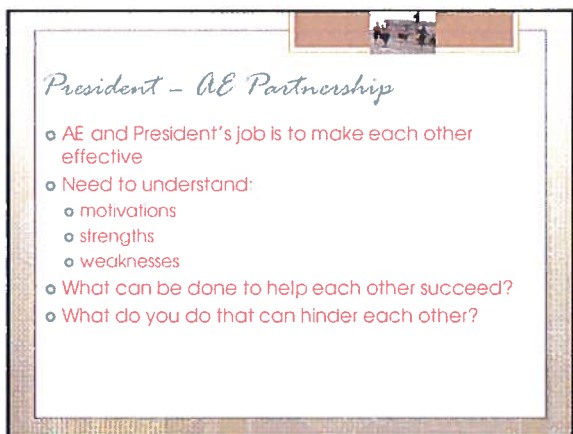
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### President - AE Partnership

- Know each others' expectations
- Communication is key
- Don't over commit and under deliver
- Create a relationship of **TRUST**
- Complete the President/AE Task List each year



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### President - AE Partnership

- You are both human (really)
  - You can't "fix" each other
- You can only work with one another
  - You are emotional beings
  - Try to see each others' interests

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### 7 Habits of Highly Effective Dialogue

- Be proactive
- Begin with the end in mind
- Put first things first
- Think win/win
- Seek first to understand then to be understood
- Synergize
- Sharpen the saw

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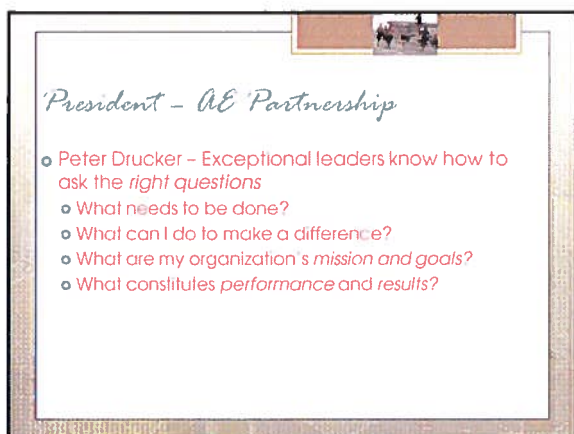
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*President - AE Partnership*

- Peter Drucker – Exceptional leaders know how to ask the *right questions*
  - What needs to be done?
  - What can I do to make a difference?
  - What are my organization's *mission and goals*?
  - What constitutes *performance and results*?

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*President - AE Partnership*

- Goal Setting
- Delegation
- Daily Communication
- Performance Appraisals
- Providing Feedback
- AE Contracts

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*President - AE Partnership*

Goal Setting- SMART Goals

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**ealistic
- **T**ime frame

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### President – AE Partnership

- Art of delegation
  - What's the **RESULT**?
  - Who's accountable and responsible?
  - By when?
  - Let it go!**

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### President – AE Communication Tips

- Communication is **CRUCIAL**
  - WHEN**
  - HOW**
  - WHAT**

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Communication Record		
Date	I Said	He/She Said

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Communication Record		
Date	I Said	She Said
10/2		
	Monthly financials – positive variance \$50k	
	Decrease Saturday office hours	
	Ethics complaint against John Smith	

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Communication Record		
Date	I Said	She Said
10/2		
X	Monthly financials – positive variance \$50k	Put it on agenda for Finance committee
X	Decrease Saturday office hours	OK for winter months only
X	Ethics complaint against John Smith	Inform Chair of ethics committee

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President – AE Communication Tips		
<ul style="list-style-type: none"> <li>Effective e-mail communication.             <ul style="list-style-type: none"> <li>Subject lines are headlines</li> <li>Make 1 point per email</li> <li>Convey facts not emotions</li> <li>Specify the response you want</li> <li>Once you send it – it never goes away</li> </ul> </li> </ul>		

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Alleviate *stress* by . . .

WRITING IT DOWN!

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The "TO DO" List

THINGS TO DO TODAY:

DUE FROM OTHERS:

PERSONAL ACTIVITIES/APPOINTMENTS:

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The Better "To Do" List

THINGS TO DO TODAY: PRIORITY (1,2,3)

DUE FROM OTHERS:

PERSONAL ACTIVITIES/APPOINTMENTS:

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## The BEST "To Do" List

TIME	TASKS
8:00-9:00	Complete Performance Review for Jim Nayzum
11:00-Noon	Finalize Financial Reports
2-2:30p	Conference call with Suzy Q

### PERSONAL ACTIVITIES:

6:30p Parent/Teacher Conference - Becca

DUE FROM OTHERS:  
Survey results from Lisa

## President - AE Partnership

- o Performance Appraisals
  - o Yearly
  - o Use job description **AND** Strategic Plan Initiatives as a guide
  - o Must be in writing
  - o No surprises

## Guidance and Sample Forms - [www.realtor.org/hrtoolkit](http://www.realtor.org/hrtoolkit)

The screenshot shows the 'Chief Staff Performance Evaluation' page on the Realtor.org HR Toolkit. The page includes a navigation bar with links like 'Home', 'About Us', 'Contact Us', 'FAQ', 'Privacy Policy', and 'Terms of Use'. The main content area is titled 'Chief Staff Performance Evaluation' and contains text about the importance of performance evaluations. It lists three reasons why you should conduct a formal evaluation for new staff: 1. provides a platform for the board and the staff to discuss the direction of work, 2. identifies areas for improvement, and 3. is required by the REALTOR® organization's insurance policy. The page also features a sidebar with links to 'In this section', 'New Staff Evaluation', 'Performance Evaluation', 'Sample Evaluation Forms', and 'Form 1'.

*Guidance and Sample Forms -*  
[www.realtor.org/hrtoolkit](http://www.realtor.org/hrtoolkit)

- Purpose
- Who should conduct the review?
  - BOD
  - Executive Committee
  - Personnel Committee
- 3, 4, 5 point scale
- Summary

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*Providing Feedback*

- Discussions may take place more than once before a formal "Performance Improvement Plan" is established
- President meets with AE to discuss performance deficiencies and restate the expectations of satisfactory performance
- Goals, objectives and standards may be reconfirmed

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*Providing Feedback*

- A time frame for improvement may be defined
- This discussion may be documented by the President for future reference
- Direct line of communication between the President and AE and vice versa

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### Providing Feedback

- A formal Performance Improvement Plan may be established if current performance is deficient to the extent that termination is being considered. OR
- Performance has not reached a satisfactory level as established in STEP ONE discussions and time frames

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### Providing Feedback

- The Performance Improvement Plan may consist of:
  - written documentation of performance deficiencies,
  - expected standards of performance; and
  - established time frames for improvement
- In most cases, the consequences for not meeting expectations should be clearly stated (e.g., demotion, termination)
- Review contract provisions - *more on that later*

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### President's and AE's Roles

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## Areas of Responsibility

- Governance of Association Structures and Organizational Operations
- Physical and Financial Resources
- Member Services
- Outreach and Advocacy
- Internal Relations

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## Governance of Association Structures and Organizational Operations

### President

- Lead the Board of Directors in determining the strategic vision and objectives
- Consult for AE recommendations on which committees will be formed to meet objectives
- Set parameters for AE empowerment to identify initiatives for goal implementation
- Monitor goal implementation; offer guidance when goals are not being met
- Delegate to AE to make all operational/ staff decisions within budgetary guidelines

### AE

- Ensure Association's legal documents and membership data are up to date and maintained for safeguarding
- Hire staff with talent needed to drive Association's goals
- Provide liaison and staff support for committees
- Ex Officio non-voting member of the Executive Committee and Board of Directors

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## Physical and Financial Resources

### President

- Approve budget as developed by staff
- Empower AE to make budget adjustments and expenditures within established guidelines
  - Budget/Finance Committee to set parameters, BOD approval

### AE

- Prepare and manage annual budget based on strategic outcomes and volunteer approval
- Ensure all funds, physical assets, and other Association property are appropriately safeguarded and administered
- Ensure strong financial position and revenue sources to operate the Association at optimum and future levels with suitable funding available to act quickly on opportunities, threats and new initiatives

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### *Member Services*

<p><b>President</b></p> <ul style="list-style-type: none"> <li>◦ Lead an ongoing analysis that envisions, identifies, and implements strategic initiatives based on member needs</li> <li>◦ Support Member recruitment, retention and orientation efforts</li> <li>◦ Collaborate with committee leaders and AE to identify and review current and new programs that impact member initiatives and professionalism</li> <li>◦ Assume a visible leadership role at networking and social events</li> </ul>	<p><b>AE</b></p> <ul style="list-style-type: none"> <li>◦ Enforce the Code of Ethics</li> <li>◦ Develop and implement programs, products and services which meet members' needs</li> <li>◦ Recommend new initiatives or direction based on trends, demographics or legislation</li> <li>◦ Poll membership on a regular basis to identify their needs and develop products, programs and services to meet those needs</li> <li>◦ Create outreach efforts to specific targeted real estate groups, potential client inquiries, and culturally and ethnically diverse groups</li> </ul>
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### *Outreach/Advocacy*

<p><b>President</b></p> <ul style="list-style-type: none"> <li>◦ Team with AE in fostering effective and synergistic relationships with:             <ul style="list-style-type: none"> <li>◦ Local government to address and legislate</li> <li>◦ Chamber of Commerce</li> <li>◦ Industry leaders</li> <li>◦ Media</li> <li>◦ Community Groups</li> </ul> </li> <li>◦ Support and promote political awareness and fundraising campaigns</li> <li>◦ Partner with AE to implement government advocacy activities at the local, state and national levels</li> </ul>	<p><b>AE</b></p> <ul style="list-style-type: none"> <li>◦ Keep abreast of issues impacting the real estate industry</li> <li>◦ Keep membership informed of issues and recommend products, programs and services to proactively address these issues</li> <li>◦ Active in the community and with government officials</li> <li>◦ Liaison between Leadership and community/government officials</li> <li>◦ Advocate the Association's legislative position and purpose in the community and among government officials</li> <li>◦ Assist Leadership with Public Relations and spokesperson activities as needed</li> </ul>
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### *Internal Relations*

<p><b>President</b></p> <ul style="list-style-type: none"> <li>◦ Set AE performance objectives and timeline</li> <li>◦ Clarify roles/responsibilities (completes the President/AE link list)</li> <li>◦ Provide constructive feedback</li> <li>◦ Meet on a bi-weekly basis to discuss or complete needs/ issues, upcoming issues/ meetings/events (Use communication tool)</li> <li>◦ Conduct annual performance review (includes past President and President Elect)</li> <li>◦ Work with AE to identify, develop and nurture future volunteer leaders</li> <li>◦ Cultivate synergistic relationships</li> </ul>	<p><b>AE</b></p> <ul style="list-style-type: none"> <li>◦ Serve as the visionary leader of the Association, delegate day to day operations to other staff</li> <li>◦ Maintain an environment in which staff takes initiative and are able to make decisions within their realm of authority</li> <li>◦ Promptly address employee relations issues and seek legal counsel when legal liability may exist</li> <li>◦ Offer constructive feedback to staff to assist in their growth and development</li> <li>◦ Develop, lead, assess and, when necessary, terminate staff</li> </ul>
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### Potential Areas of Conflict

- o Clarify roles from the start:
- o President leads the Association - the AE runs the Association
- o AE makes the personnel decisions
- o Micro management vs. absentee management

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### Potential Areas of Conflict

- o Clarify roles from the start:
- o President leads the Association - the AE runs the Association
- o AE makes the personnel decisions
- o Micro management vs. absentee management

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### Hiring Tips




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### Hiring Tips

- Define the job
- Develop position description
  - Responsibilities
  - % of time spent/frequency
  - Essential functions
- Determine FLSA Status (Exempt / non-exempt)
- Skills, experience, physical requirements, education
- College degree required?

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### Job Descriptions – Why?

- Keep 5-10% "Other duties as assigned"
- Identifies the most important responsibilities for recruiting/interviewing purposes
- Lets employees know what's expected of them

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### Job Descriptions – Why?

- Helps you to determine FLSA status
- It's your gauge for performance
- Helps identify the "essential functions" for ADA-15+ees

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### Job Descriptions – Why?

- Helps guard against legal liability
- The EEOC states that “(I) f the individual is qualified to perform essential job functions except for limitations caused by a disability, the employer must consider whether the individual could perform these functions with a reasonable accommodation. If a written job description has been prepared in advance of advertising or interviewing applicants for a job, this will be considered as evidence, although not conclusive evidence, of the essential functions of the job.”

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### Job Descriptions – Why?

- What should be included?
  - Title
  - Supervisor name
  - Supervisor title
  - FLSA
  - Date job description was last updated
  - Primary duties/responsibilities/frequency
  - If position is supervisory, names and titles of other employees under the supervisor's span of control
  - Experience, skills (**physical and technical**), **education required**

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### Job Descriptions and Performance

- Job description is your “gauge” if the employee is not performing
- In writing
- Identify where improvement is needed
- Set a timeline with clear objectives
- Observe *and* document (+/-)
- Follow up – don't let the deadline slip!
- Review/update every 1-2 years or when major change in responsibilities

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### Sample Job Description

PRIMARY DUTIES AND RESPONSIBILITIES	FREQUENCY (D, W, M, A)	% OF ANNUAL TIME
	Daily	75%
<p>1. Effectively and efficiently receive incoming phone calls. Provide answers to member inquiries and forward calls to the appropriate staff member. Maintain desk reference with information on staff members, department key contacts, hot topics for the month, facsimile machine phone numbers, State and Local Board phone numbers and contacts. Handle inquiries from vendors and the public. Provide information on locations and phone numbers to state and local associations when inquiries are received.</p> <p><b>Decisions:</b> Who is the appropriate staff member to receive the call? Answer to routine calls. When to update contact list. When to refer questions to state and local boards.</p> <p><b>Recommendations:</b> Checklists to answer calls more effectively, ways in which to receive updated information more quickly.</p>		

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### *Placing Your Ad*

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### Yes or No? – Placing your ad

- You have a receptionist position available. You'd like your ad to read "Young, energetic, female wanted . . ."
- You post an ad which states "Recent college grad wanted . . ."
- 5 years supervisory experience required
- Equal opportunity employer

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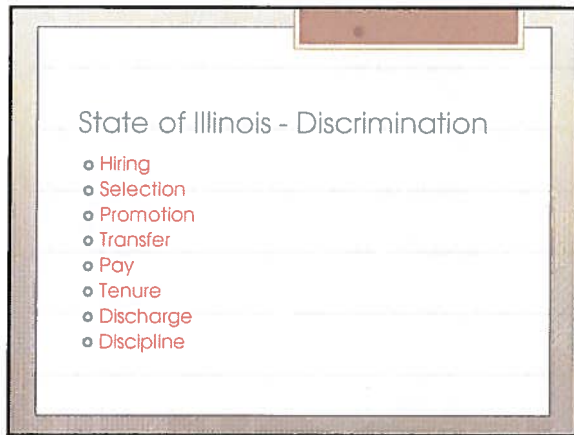
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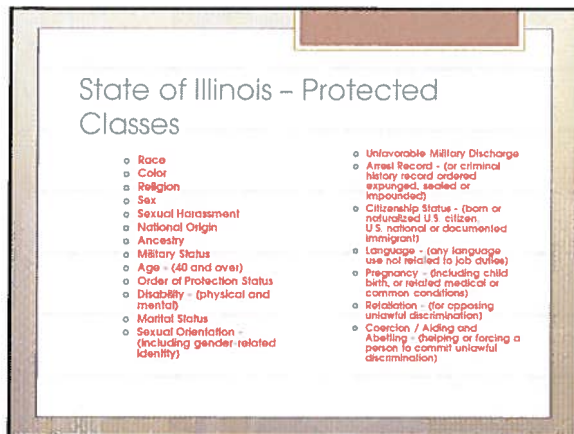
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### Protected Classes-Federal Law

- Age
- Disability
- Equal Pay/Compensation
- Genetic Information
- Harassment
- National Origin
- Pregnancy
- Race/Color
- Religion
- Retaliation
- Sex
- Sexual Harassment

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### Interviewing Tips

- Review resumes
  - Highlight points needed for clarification
  - Keep drilling
  - (4 Ws)
  - Examples of statements found in resumes
    - Performed reconciliation of monthly reports
    - Resolved system errors
    - Respond to routine calls

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### Phone Interview

- Introduce yourself
- Is now a convenient time?
- Confirm salary required – if not in your range, end the call
- Ask behavioral questions
  - What interested you about the position?
  - What do you like about your current job?
  - With what type of supervisor/work environment do you work best?
- Review highlights of the job with the applicant
- Listen for
  - Enthusiasm
  - Personality
  - Communication skills

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## Testing

- Test must be required for the job
- Must be valid and reliable
  - Typing
  - Spelling
  - Grammar
  - Machinery to be used

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## Interviewing Tips

- Establish rapport, make the applicant comfortable
- Be consistent – ask all applicants the same questions
- Listen – less than 30% of **your time** should be spent talking
- Silence is **golden**
- Take notes
- Review the job description
- Solicit questions

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## Interviewing Tips

- Did the applicant prepare?
  - Dress for the occasion
  - On time
  - Conduct research on your Association
  - Ask relevant questions
- Obtain references (personal and business)
- Close the interview
- Conduct reference/background checks

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### Yes or No-Interview questions

- The job requires overtime, can you ask whether the applicant has small children at home?
- Have you ever been arrested?
- What language is typically spoken at home?
- Questions **must** be relevant to the **job!**

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### Impermissible Questions

Age	Emergency contact information
Arrest record	English language skills
Credit information	Height and weight
Citizenship	Marital or family status
Disability	Child care arrangements
Driver's license	Race, color, sex, national origin
Educational attainment	Military records

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### Permissible Questions

- This job requires travel. Can you meet that requirement?
- Can you, after accepting employment, submit verification of your ability to work legally in the United States? (You may give accepted forms of ID, but do not ask what ID the person will be bringing with them after accepting employment)
- This job requires overtime. Will you be able to meet that requirement?

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### Behavioral Interview Questions

- "Can you give me an example of ..."
- "Describe a situation when you were called upon to ..."
- "Give me an example of a time when you ..."
- "Explain your role in ..."
- "What type of supervisors do you find easier to work with?"

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### Reference Checks

- Introduce yourself and your company
- Tell the person who referred you to them and why
- Ask if now is a convenient time for them to spend a few minutes with you to discuss the applicant
- If not, reschedule for a different time and follow through
- Set the person at ease
- Clarify their answers
- Thank them for their time

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### Reference Check Questions

- How long have you known the candidate?
- How did you become acquainted?
- What types of projects have you worked on together?
- What were your roles?
- What are the candidate's strengths?
- Describe a time when you observed the candidate in a stressful situation. What was the situation and how was it handled?
- Knowing that we're not all perfect, what is one area where the candidate can improve?

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## Background Checks

- Verify education, current employer, pay
- Highly recommended for finance, IT or human resources positions
- Authorization form
- Look back 7 years, unless earning \$75,000+
- Conduct a ssn trace
  - Provides you with other states applicant lived
  - Check all states/counties
  - May need additional authorization for other states

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## Closing the deal

- Extend the offer
- Be prepared for counter-offer
- Offer letter – do not list annual salary
- Send reject letters to those who interviewed

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## *Planning Your Exit Strategy*

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## WHAT IS SUCCESSION PLANNING?

Replacement v. Succession Planning

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## Replacement v. Succession

Variable	Replacement Planning	Succession Planning
Timeframe	0-12 Months	12-36 months
Readiness	Best candidate available	Candidate with the best development potential
Commitment Level	Designated preferred replacement candidate	Merely possibilities until vacancies occur
Planning Focus	Vertical lines of succession within units or functions	A pool of talented candidates with capabilities for several assignments
Planning Development	Usually informal, a status report on strengths and weaknesses	Specific plans and goals set for the individual
Flexibility	Limited by plan structure, however, in practice has a great deal of flexibility	Flexible plans that are intended to promote development and thinking about alternatives
Plan Basis	Each manager's best judgment based on observation and experience	The result of input and discussion among multiple managers
Evaluation	Observation of performance on the job over time; demonstrated competence; progress through the unit	Multiple evaluations by different managers on different assignments, testing and broadening early in career

Source: Adapted from James W. Wooten, Human Resource Strategy, New York: McGraw-Hill, 1993.

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Why is succession planning important?

- You never know what can happen




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Why is succession planning important?

- You never know what can happen




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Why is succession planning important?

- You never know what can happen




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Why is succession planning important?

- You never know what can happen




**Plan for the unexpected!**

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### Why is succession planning important?

- Helps to attract and retain employees
- Recognizes top performers
- Keeps your Association running
- The burden doesn't all fall on you
  - ...*IF you can let it go!*

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### WHEN IS THE BEST TIME TO PLAN?

**YESTERDAY**

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### What's the process?

It's not all about you . . .

- Key positions that are difficult to fill
- Unique to the REALTOR® Family
  - MLS
  - Professional Standards

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### Succession Planning Checklist

- Develop policies/procedures for all positions
- Operational Procedures at a Glance
  - Committee appointments, member/staff travel policies
  - State/NAR Leadership requirements
  - AE Operational Responsibilities
    - Budgetary constraints
    - Passwords
    - Association Counsel
    - Insurance/Benefits Administration
    - Employee Manual

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### Succession Planning Checklist

- Guidance on HR Toolkit
- Develop policies/procedures for all positions
- Operational Procedures at a Glance
  - Dues Administration
    - When collected, late fee/reinstatement policies
  - MLS Administration
    - Structure, vendor contracts, billing cycle
  - Facilities
    - Keys, maintenance, insurance, office equipment, vendor contracts

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### Succession Planning Checklist

- Develop policies/procedures for all positions
- Operational Procedures at a Glance
  - Education
    - Fees, Leadership Development, Board Orientation
  - Professional Standards
  - Financials
    - Check signing authority
    - Bank accounts
    - Credit cards

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Succession Planning Checklist

- Develop policies/procedures for all positions
- Organizational Assessment Checklist
  - Legal Documents
    - Articles of Incorporation, Bylaws, IRS Tax Exempt Status, Tax Filings
  - Governance Structure and Responsibilities
    - Board of Directors
    - Committees
  - Internal/External Communications
  - Technology

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Succession Planning Checklist

- Key competencies/skills needed



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Succession Planning Checklist

- Key competencies/skills needed
  - Ability to work with various personalities
  - Management v. Leadership
  - Financial Management
  - Leadership Support

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What skills/competencies are needed?

- PATIENCE
- FLEXIBILITY
- EMPATHY
- Oral/written communication and presentation skills
- Social/approachable
- Knowledge of our industry and its challenges
- Ability to see the **BIG PICTURE**

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What skills/competencies are needed?

- Legislative exposure
  - Understand the issues and how it impacts our members
- Understands Associations' operations – systems, processes, people, departments and their impact/interaction
- Strategic Planning – What? How? Who? When?
- Accountability

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WHAT'S THE PROCESS?

RECRUITING

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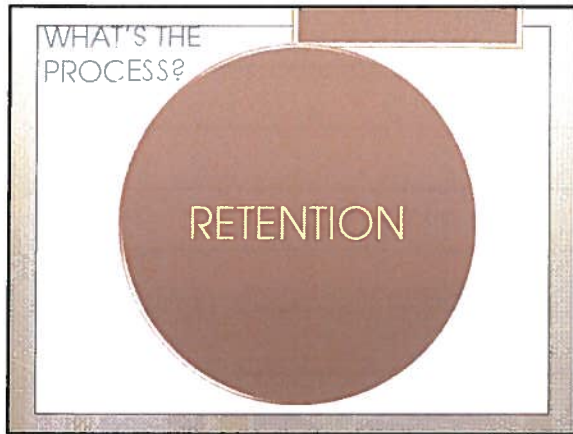
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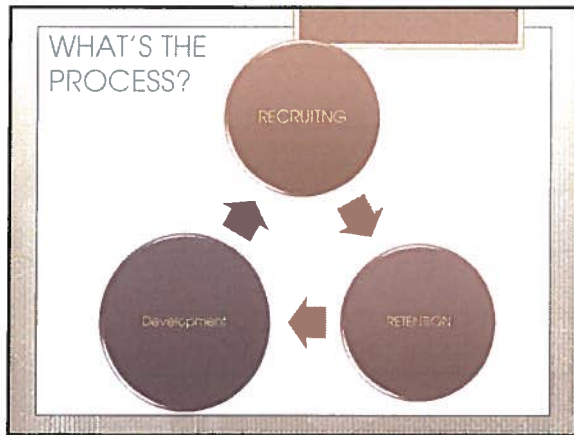
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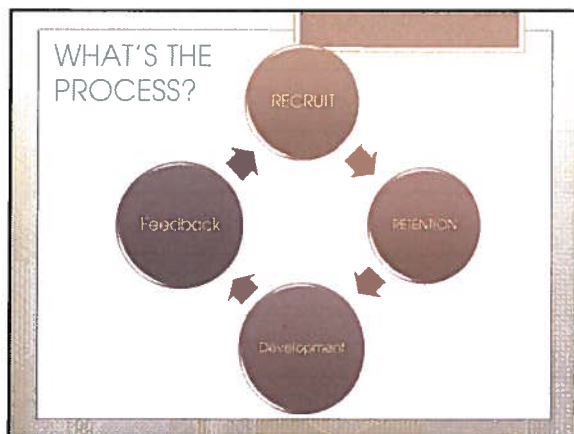
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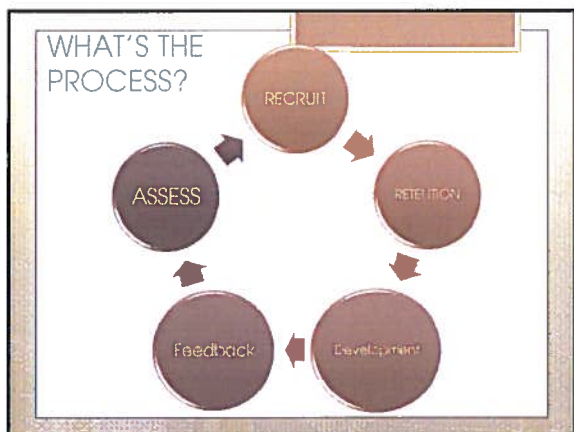
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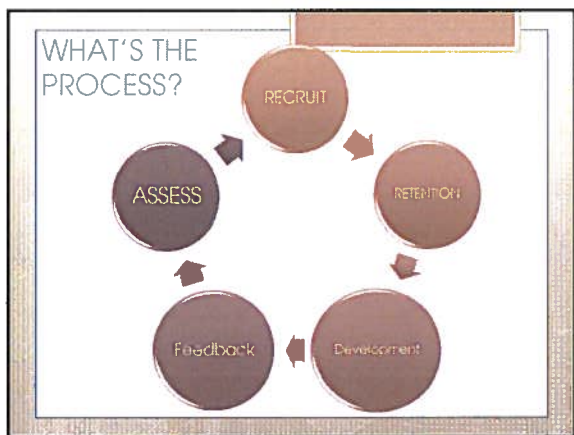
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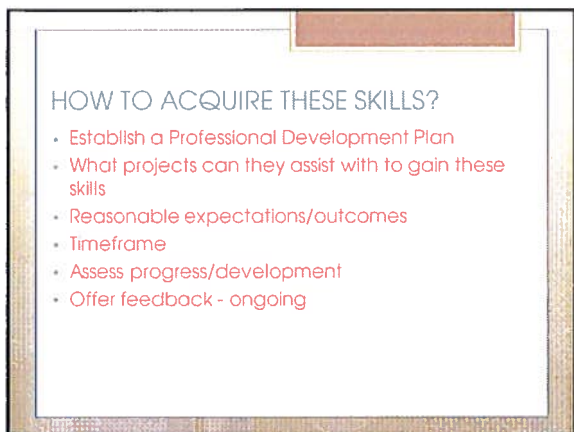
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## Development is crucial

- When key staff leave or ...

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## You decide to move on ...



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## HOW DO I MAKE MY EXIT?

- AE Resigns
  - When should notice be given?
  - It depends ...
- Relationship with Leadership and your BOD
- Be prepared

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## HOW DO I MAKE MY EXIT?

- Terminating an AE
  - NAR Guidelines for Wrongful Termination
  - Clear, progressive communication process
    - Not ALWAYS necessary
  - Contract provisions

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## AE CONTRACTS




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## *Contracts v. Job Descriptions*

- **Contracts**
  - Term of contract
  - Compensation
  - Benefits
  - Perks
  - Termination

**EMPLOYMENT AGREEMENT**

This EMPLOYMENT AGREEMENT ("Agreement") is entered into as of \_\_\_\_\_, by and between \_\_\_\_\_, "EXECUTIVE" and \_\_\_\_\_, "ASSOCIATION" a \_\_\_\_\_ not-for-profit corporation.

IT IS AGREED:

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### Contracts v. Job Descriptions

#### Job Descriptions

- Responsibilities are clearly stated and (ideally) tied to strat plan
- Identifies skills, ability, education and experience required
- Sets standard for performance review
- Identifies essential functions of the job
- Great recruiting tool

PRIMARY DUTIES AND RESPONSIBILITIES	FREQUENCY (D W M A)	% OF ANNUAL TIME
Goal/Objective: 1.		
Decisions:		
Recommendations		

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### AE JOB DESCRIPTION

- Online Models Planning Tool (realtor.org)  
Generates a Job Description for you!

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### EMPLOYMENT CONTRACTS

- Negates Employment-at-Will
- Ensures employment for a set time
- Parties can customize their relationship

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## EMPLOYMENT CONTRACTS

- Job duties
- Term of contract
- Compensation
- Benefits
- Termination Provisions
- Other Perks

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## EMPLOYMENT CONTRACTS

### +Advantages

- ✓ Reduces uncertainty
- ✓ Security
- Stability
- ✓ Commitment
- ✓ Retention
- ✓ Defines compensation and benefits

### - Disadvantages

- ✓ May not be renewed
- ✓ Harder to leave
- Binds the Association
- ✓ Inhibits change

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## PERKS

- Car allowance v. reimbursement for IRS mileage
- Laptop/iPad
- Cell phone - unlimited talk/text/data
- Insurance premium - 100% Paid for AE
  - (considered taxable income)
- Professional dues
- Travel to attend State, Regional, NAR and other relevant conferences

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## BENEFITS

- Health Insurance- When does coverage **terminate**?
  - Medical
  - Dental
  - Vision
  - EAP
- Life insurance
  - % of pay or flat dollar amount?

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## BENEFITS

- Disability
  - Short term
  - Long term
- Retirement Plan
- Vacation - most states require that any **earned** but **unused** vacation be paid to employee at time of termination - Check your State's Department of Labor website

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## AE SEARCH PROCESS

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### Hiring a new AE

- HR Toolkit - for Hiring an AE
- REALTOR® Association Models Planning Tool
- Succession Planning Tools on [realtor.org](http://realtor.org)
- NAR Strategic Association Management (S.A.M.) Services
  - [www.realtor.org/SAM](http://www.realtor.org/SAM)

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### You're never alone . . .



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

Donna Garcia ([dgarcia@realtors.org](mailto:dgarcia@realtors.org))

312/329-8311

OR

Kelsi Dunn ([kdunn@realtors.org](mailto:kdunn@realtors.org))

312/329-8518

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### You're never alone . . .



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

- Develop your Strategic Plan
- Conduct Strategic Workforce Planning
- Compensation studies
- AE/Staff recruiting

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**STRATEGIC ASSOCIATION MANAGEMENT**  
**(S.A.M.) Services – *Let's Connect!***

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

Follow me on Twitter   
@hrbizpartner

Let's be Friends on 

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



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**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

REALTOR® Brokers Group 

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Questions?

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