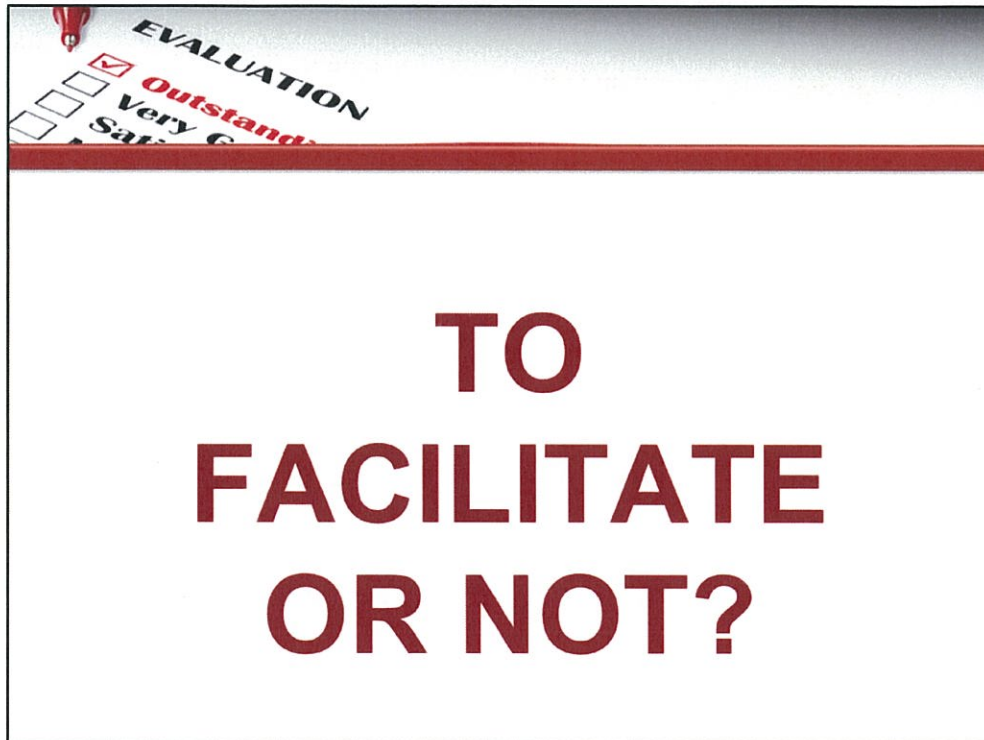


**Using the NAR Association Models
Tool**

Facilitator Guide

NATIONAL ASSOCIATION OF REALTORS®



This PowerPoint Guide is designed to help facilitators lead associations through the Models process, but it can also be used to help association leaders – staff or volunteer – decide whether to use the process or not.

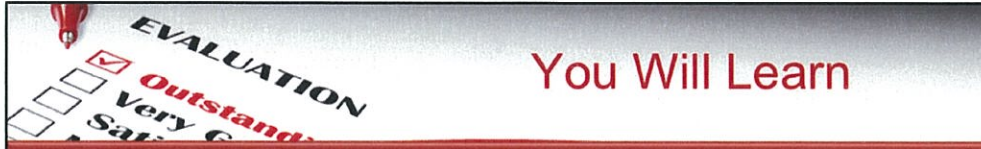
Some AEs and/or their volunteer leaders prefer to have an “outside” facilitator move them through most of these processes to avoid any perceived or real bias on the part of an “inside” facilitator. Reviewing these materials will help you to decide which direction your association may want to take.

(Note: an exception to using a facilitator would be the AE’s personal development, which would realistically be done just by the AE.)

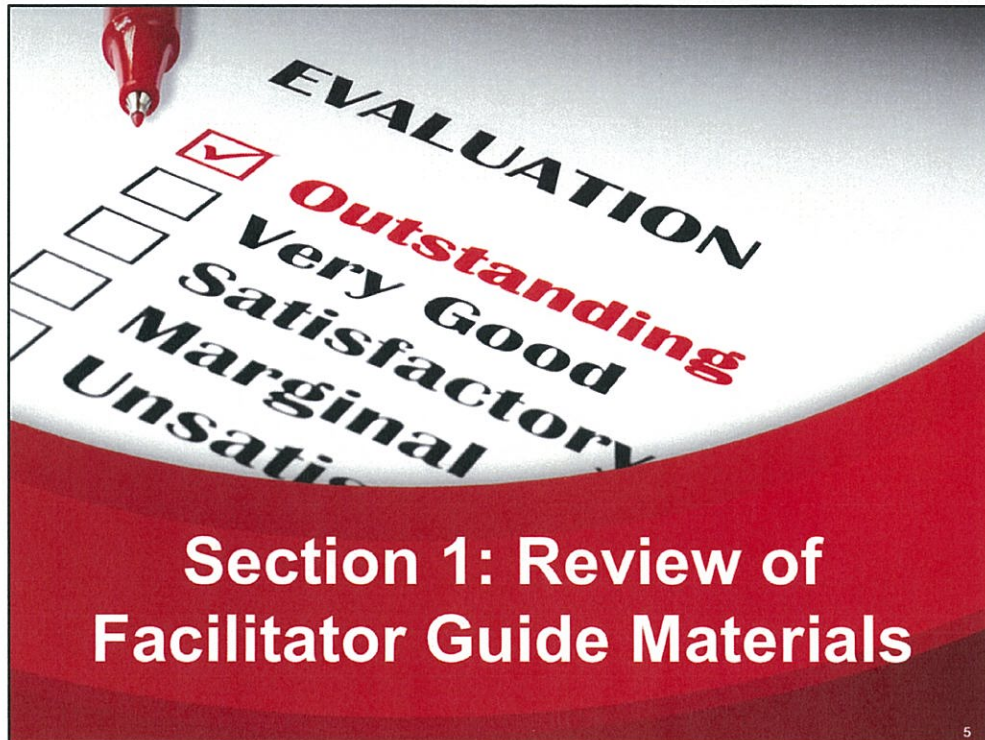
The Facilitator Guide will help guide the process in all five areas:

- Strategic Planning
- Structural Audit
- Staff / Volunteer Alignment
- Personal Career Planning
- Job search, hiring & transition assistance

The Facilitator Guide will provide suggestions for applying the tool to each of these five areas and give you step-by-step directions for how you can set up each session, plus tips about analyzing the results.

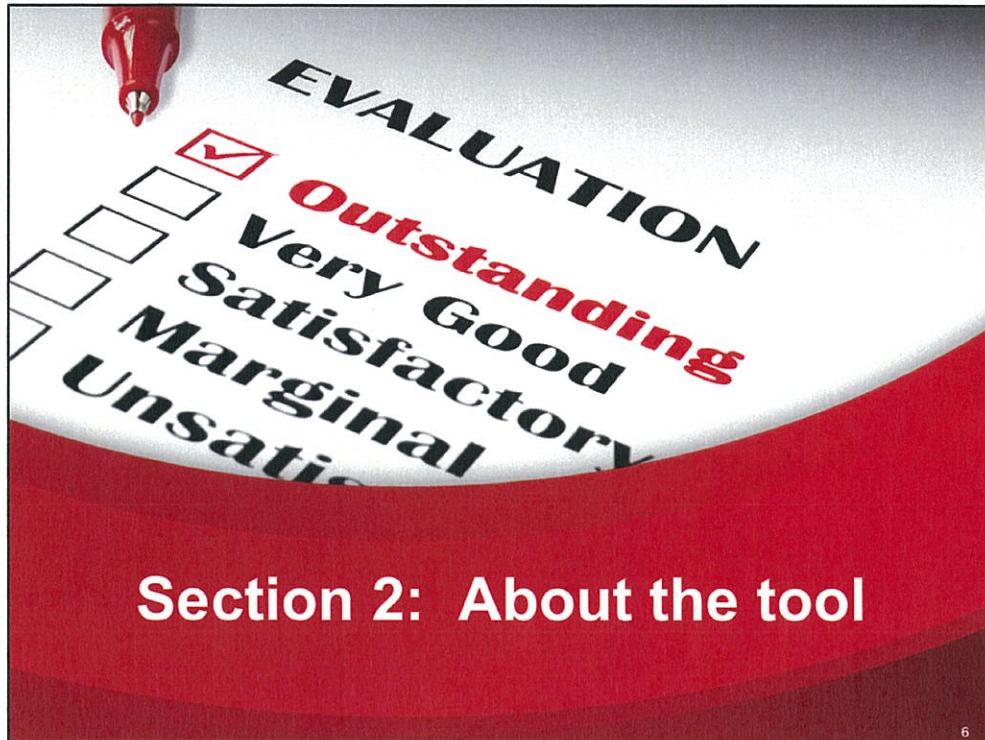


- 1. How to use the tool simply and effectively**
- 2. The tool's various applications**
- 3. Who should use the tool**
- 4. How to evaluate, interpret and use the results**
- 5. How to explain each component to others**



List of items included:

- Step-by-step directions to finding and using the tool
- Association Models document (specific descriptions of each model)
- Models Questionnaire
- Sample Results page
- Sample AE Job Description
- Sample President Job Description
- Sample Operational Philosophy document
- Link to NAR ALD Volunteer Resource Guide info
- Case studies describing reasons for using the tool



This section will enable you to explain the purpose of the tool and the three basic models, of which each association is a blend.

The REALTOR® Association Models Planning Tool simplifies the tasks of association self-evaluation and planning for enhanced member service through the use of three models of association management: Administrative, Management, and Leadership.



The ultimate role of the REALTOR® organization is to help shape and influence a favorable business environment for its members.

Each REALTOR® association has the responsibility to efficiently and effectively provide value to its members. While the operating framework in which an association chooses to serve its members may vary depending on its organizational structure, demographics, size, available resources, and diversity of needs, there are many creative ways to deliver and optimize value, even with limited resources.

This tool is a way to help you achieve these goals. How? First you'll enter thoughtful answers to the self-evaluation questionnaire. Then, the results report automatically generated from the questionnaire will provide you with a set of tools to grow your association.

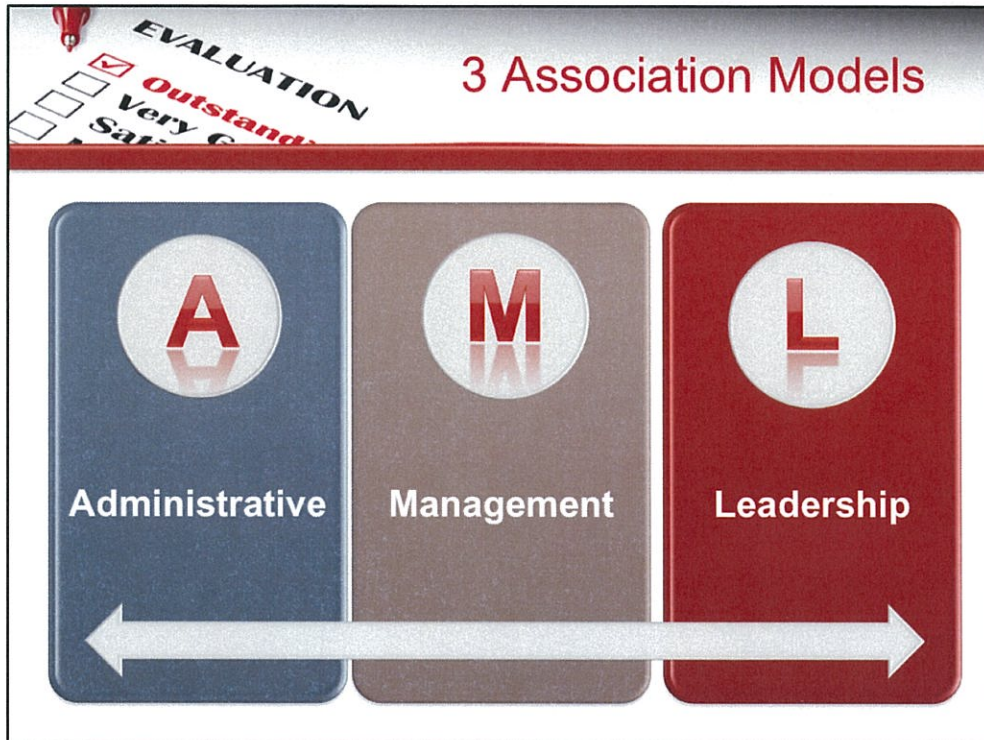


Where will your association be in five years? What are your goals? How will you achieve them?

These are tough questions that many association executives rarely have time to focus on. The daily routine of attracting members, managing volunteers, and balancing the books often takes precedence over the big picture.

A description of all three models can be found at:

<http://www.realtor.org/ae/manage-your-association/association-models-planning-tool/understanding-the-three-association-management-models>



The REALTOR® Association Models Planning Tool simplifies the tasks of association self-evaluation and planning for enhanced member service through the use of three models of association management: Administrative, Management, and Leadership.

The Administrative Model



Member focused

Tends to have a fairly small staff structure

✓ **1 part-time AE to 3 or 4 full time staff**

Relies on significant member involvement for planning, decisions, and logistics

What's an Administrative Association?

A purely administrative association is member-focused. It *typically* has a fairly small staff, ranging from one part-time association executive to three full-time professional staff.

The AE maintains a general familiarity in legal, regulatory, and business issues impacting the association and has a basic competency in the office management skills, including word processing and spreadsheets, bookkeeping, and basic technology skills, such as e-mail and the Internet.

The AE knows where to find information that is important to members in conducting their daily business activities.

AE compensation is locally competitive and comparable to other high-level administrative positions.

Elected leadership is very involved in the administration of the association, and the authority for nearly all decision-making is vested in the officers and the board of directors. The association focuses on networking activities and opportunities for members to learn from one another.

The Administrative Model

The AE has:

Basic competency in office management skills

Knows where to find info important to members

Basic familiarity in legal, regulatory and industry issues



The Administrative Model

The AE must:

**Possess general knowledge of
business and financial
operations**

**Establish good working
relationships with service
providers**

**Efficiently administer
association business**

**Be skilled at engaging member
involvement**



The Management Model



Source of info for members on best business practices and trends

Usually a larger staff

- ✓ **Often from 3 - 12**
- ✓ **Most are non-exempt**

AE is responsible for all aspects of administration

- ✓ **Has some focus on community and R.E. industry issues**

What Is a Management Association?

A purely management association is a source of information for its members on best business practices and trends. Staff size *typically* ranges from three to 12, with defined positions responsible for specific programs.

The staff possesses expertise in managing and communicating legal, regulatory, and business issues impacting the association and effectively manages association business. Most of the staff are non-exempt.

The AE is responsible for all administration and management of the association, with added focus on community and real estate industry issues. The AE creates staff job descriptions, hires and manages staff, sets staff salaries within the budget, and determines staff structure. AE compensation is regionally competitive and may be based on data from statewide salary surveys.

Volunteer leadership determines the association's strategic vision and sets parameters for staff empowerment. Decision-making authority is vested in the board of directors with authority for most operational decisions delegated to staff. Overall, management is a hands-on model with healthy volunteer involvement and some restrictions on the AE's authority.

The Management Model



Volunteer leadership

- ✓ **determines strategic vision and sets parameters for staff involvement**
- ✓ **Decision-making authority with directors and operational decisions delegated to staff**
- ✓ **Hands-on model with active volunteer involvement and some restrictions on AE's authority**

The Management Model

The AE has :

**Strong competency skills
in office management**

**Broad-based
understanding of legal,
regulatory and industry
issues.**



The Management Model

The AE must:

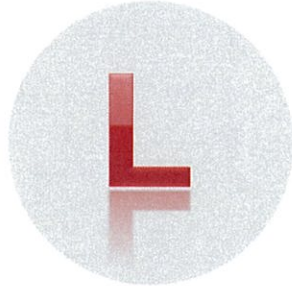
Possess strong knowledge of business and financial operations

Develop and manage staff around an organizational plan with clear responsibilities

Ensure that strategic and business planning processes are in place



The Leadership Model



High level of sophistication and proactivity

- ✓ **Initiates and implements innovative and creative programs, products and services that provide enhanced value for members**

Usually includes senior mgt. team of department heads who report to AE

What Is a Leadership Association?

A purely leadership association implements innovative and creative programs, products, and services that provide enhanced value for members beyond their day-to-day businesses.

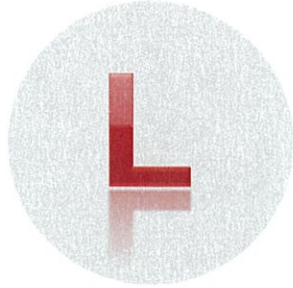
Typically, staff includes a senior management team of department heads who report to the AE and are responsible for all association administration and management.

The AE and the senior management team position the organization based on envisioned real estate industry trends. Staff possesses expertise and provides leadership in political, legal, regulatory, and business issues impacting the association.

AE compensation is nationally competitive in the upper range and may vary depending on member needs and market conditions.

Elected leadership determines strategic vision, but staff develops goals and plans to implement the vision. Decision-making authority for all operational procedures is vested in the AE. Further, policies are in place to authorize the AE to take action quickly when an emergency arises, without having to seek approval from elected leaders.

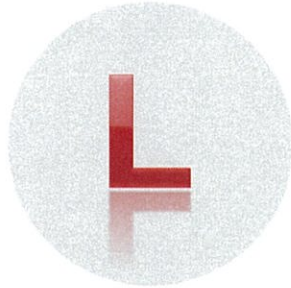
The Leadership Model



**AE and senior mgt.
position the organization
based on envisioned R.E.
trends**

- ✓ **possess expertise and provide leadership in political, legal, regulatory, and business issues**
- ✓ **Initiates policy formation and advocacy**

The Leadership Model



Volunteer leadership

- ✓ **Determines strategic vision, but staff develops goals and plans to implement it.**

Decision making authority for operation is with AE

- ✓ **Policies are in place to authorize AE to take quick action without prior approval**

The Leadership Model

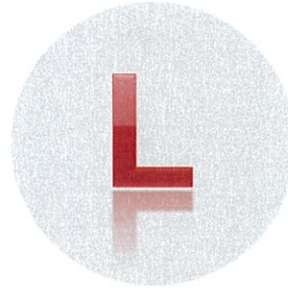
The AE must:

Seek out new and innovative programs, products, and services

Develop creative management solutions

Cultivate a highly evolved and trained staff team

Be a respected and motivating influence for staff and leaders



Which Model Fits?

**Most associations are a
BLEND of the 3 models**



The three models define services associations provide.

These models should be viewed as just three points on a continuum, and not just in their pure sense. Associations should not expect to fit neatly into any one model, rather it is likely that many associations are operating in all models, depending upon the function or service. For example, an association may fall predominantly into the Administrative Model, but its governance may be more closely aligned to the Management Model.

Volunteer and staff leaders may use these models as a guideline to assess their current operations and determine where they aspire to be in delivering value. This document will also help them determine how they can partner with other associations to expand the menu of services they can offer their members.

EVALUATION

- Outstanding**
- Very Good**
- Satisfactory**

No model is better than the other!

It's all about resource allocations, volunteer involvement, and priorities!

No model is "better" than another. They merely reflect an association's resources, volunteer involvement, and priorities.



Associations will benefit and prosper from this planning tool if their volunteer and staff leaders work together as partners to identify their model of choice based on their association's business philosophy and member needs and preferences.

Possible uses:

- AEs and other staff may use it to determine their internal alignment in how the association's goals should be carried out.
- The Board of Directors may use it to determine their overall operating philosophy and direction for the future.
- The Leadership Team may use it to help develop with the AE the AE's position description and evaluation processes.
- The Strategic Planning Committee may use it to determine the steps necessary to move from "Current" to "Future."
- An AE search committee may use it to identify the competencies necessary and desired in AE candidates.

Why you Should Use it

- 1. Identify where your association is today**
- 2. Identify where your association would like to be in the future**
- 3. Align staff and leadership expectations**
- 4. Career planning and professional development**



We frequently hear about AEs and volunteer leaders butting heads because they see things very differently in terms of their roles and responsibilities. They see their associations differently – both how they are today or where they want them to be in the future.

Or sometimes they're not disagreeing about these things, they collectively just aren't sure what they should be doing to help their associations progress.

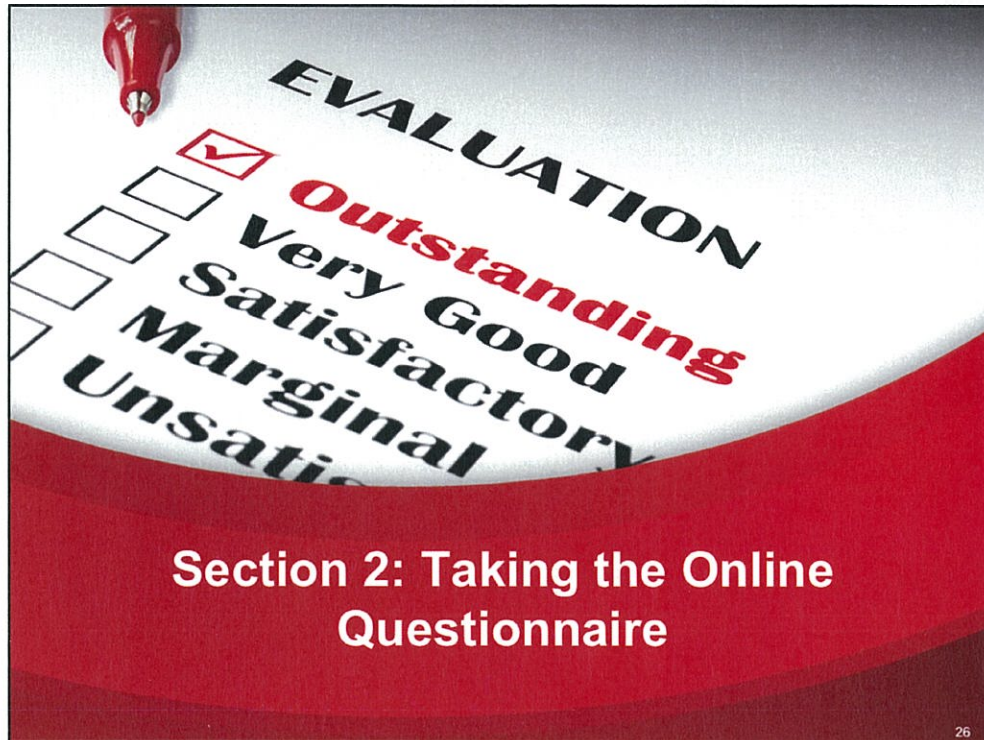
Using this planning resource will help you help your association focus on what's important to them and help you plan for the future by painting a clearer picture of what that picture might look like.

When You Should Use It



In fact, the Models Planning Tool can be used over and over again several ways:

- To assess the association's current operating philosophy
- To identify where the association would like to be
- To align leadership and staff expectations
- To identify your professional career planning and development goals
- To serve as an annual strategic planning tool
- To help assess specific programs or operations within you association
- To serve as a structural audit tool for association reorganization
- To help develop or modify an AE job description
- To provide a needs assessment for AE search committees in hiring AEs.



This section will explain how to take the questionnaire found on www.realtor.org.

You'll evaluate your association in each category by selecting one response from the available choices. Read through all of the questions before you begin to get a better understanding of the nature of the questions and the time you'll need. You must select an answer for each question within each section of the questionnaire.

The questionnaire allows you to respond for both current (where your association is now in delivering services) and future (where you would like to be in terms of delivering services) operations simultaneously.

EVALUATION
 Outstanding
 Very Good
 Satisfactory

The Questionnaire


www.realtor.org/models

On Realtor.org (search under “Models Planning Tool”)

- ✓ **31 Questions**
- ✓ **5 key areas to evaluate**
- ✓ **Simplifies task of self-evaluation**

Today and the future on one questionnaire!!!!

Helps plan for member services



As noted in the slide, the questionnaire can be accessed at: <http://www.realtor.org/models> under left-hand navigation link – “Planning Questionnaire”. You can also view/print a “Sample Assessment Questionnaire.”

What is Evaluated?



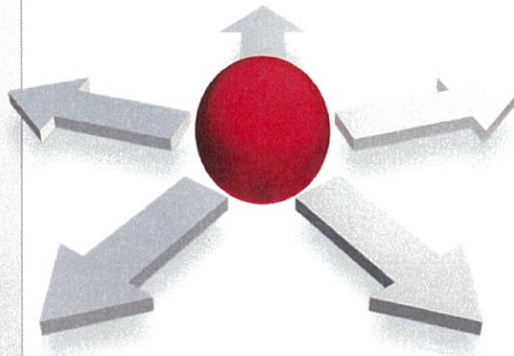
You'll receive a snapshot of your association -- either as it is today or as you'd like it to be in the future -- based on your responses in the questionnaire about five essential categories:

- Governance of Association Structures and Organizational Operations
- Physical and Financial Resources
- Staff Competencies
- Member Services
- Internal and External Relations

The tool can be used one time as an assessment of your current association management processes, then taken a second time to map a growth strategy.


You can fill out a questionnaire every year as part of your strategic planning, and you can also have several members or your leadership and staff fill out a questionnaire, then compare your answers.

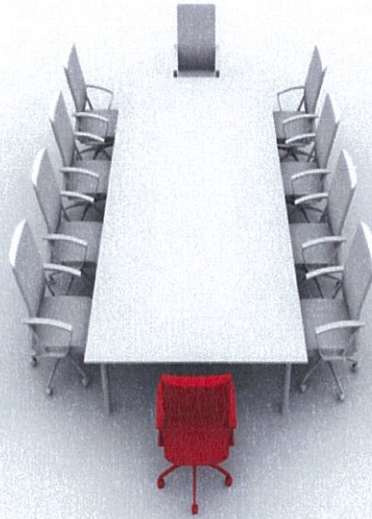
**Can do
each
section
separately
or all at
once**



The next few slides will examine each section more thoroughly.

Governance & Structure

- 
- EVALUATION**
 Outstanding
 Very Good
 Satisfactory
1. Volunteer Involvement
 2. Leadership Focus
 3. Decision-making Authority
 4. Committee Structure



Physical & Financial Resources

- 
- An evaluation checklist graphic with a red pen nib at the top left. It includes the word "EVALUATION" in bold, a checked box next to "Outstanding", and other partially visible options: "Very Good" and "Satisfactory".
1. Office Location & equipment
 2. Finances
 3. Budgeting process
 4. Reserves & Investment policies



Staff Competencies

- 
- EVALUATION**
 Outstanding
 Very Good
 Satisfactory
1. Staff Structure
 2. Staff Compensation
 3. Staff Professional Development
 4. Executive's Role & Focus



Member Services

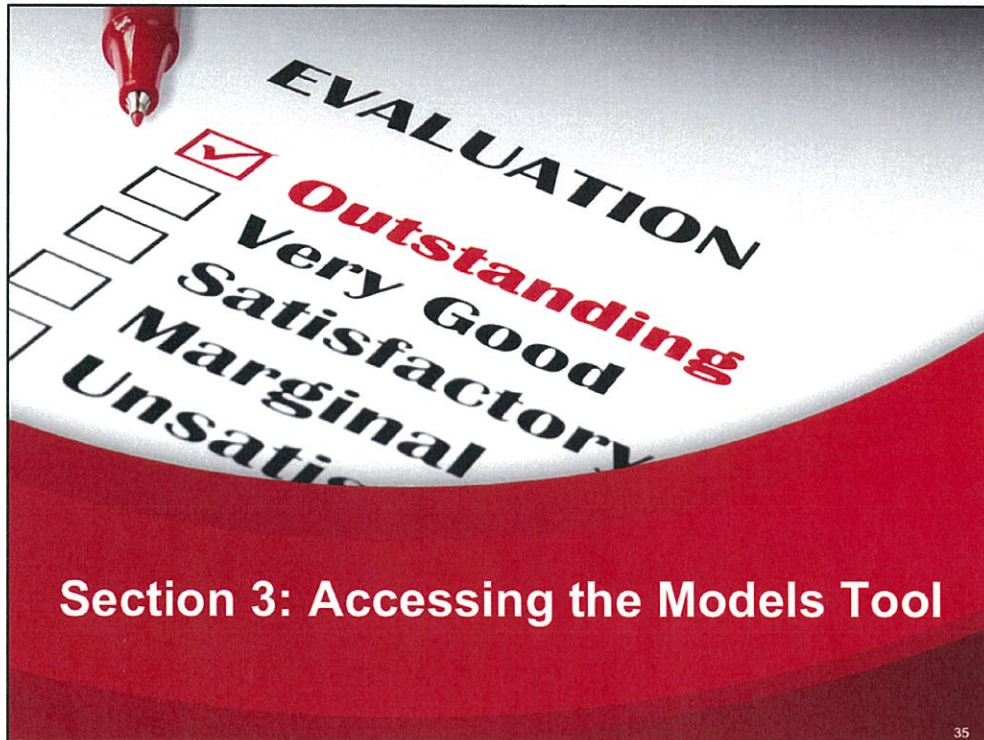
- 
- 1. Member recruitment, retention & orientation**
- 2. Professional Standards**
- 3. Education**
- 4. RE business tools**
- 5. Networking**
- 6. Communication tools**



Internal & External Relations

- 
- EVALUATION**
 Outstanding
 Very Good
 Satisfactory
1. Volunteer Leadership recruitment
 2. Other relationships
 3. Political awareness
 4. Government advocacy

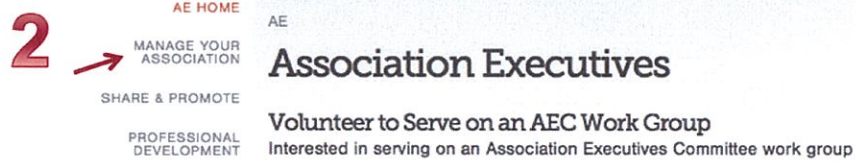




This section will show screen shots of the Models section on the NAR website.

How Do You Access the Tool?

Just three clicks! From REALTOR.org...





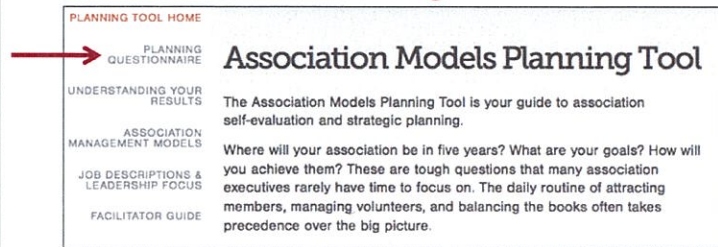
Sign on to www.realtor.org with User Name and Password.

3 Popular Toolkits

- Code of Ethics Training Toolkit
- Fraud Prevention Toolkit
- Guide to Recruiting AEs
- Human Resources Toolkit
- Merger Kit
- [Models Planning Tool]
- Organization Assessment Checklist
- Strategic Planning Resources Toolkit
- Tools for New AEs
- Value Positioning Toolkit

IMPORTANT NOTE: The Tool's assessment questionnaire is password-protected at www.realtor.org and the user must log into www.realtor.org with their User Name and Password first. If they have forgotten either or they have none, there are instructions on the page to help them further.

**Once at the Models homepage, click on
“Planning Questionnaire”**



PLANNING TOOL HOME

PLANNING QUESTIONNAIRE

Association Models Planning Tool

UNDERSTANDING YOUR RESULTS

ASSOCIATION MANAGEMENT MODELS

JOB DESCRIPTIONS & LEADERSHIP FOCUS

FACILITATOR GUIDE

The Association Models Planning Tool is your guide to association self-evaluation and strategic planning.

Where will your association be in five years? What are your goals? How will you achieve them? These are tough questions that many association executives rarely have time to focus on. The daily routine of attracting members, managing volunteers, and balancing the books often takes precedence over the big picture.

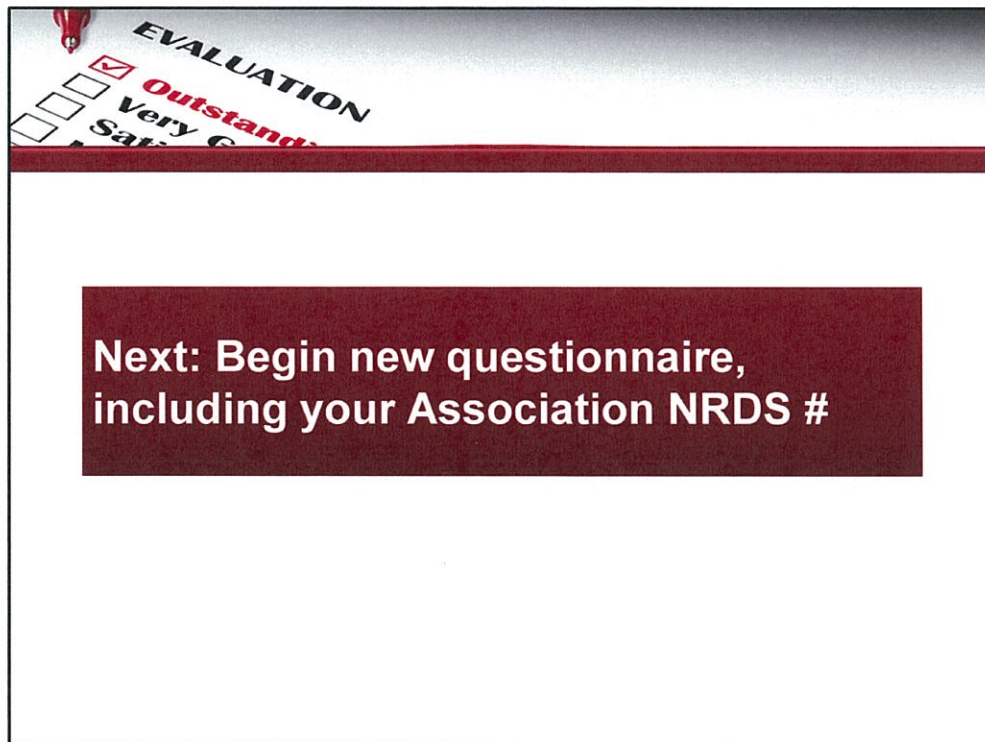
The link to “Proceed to Questionnaire” is at the bottom of the page

Save Your Answers and Return Later

If you're interrupted or cannot finish in one sitting, you can save your incomplete questionnaire, then return to the database to complete it at a later time. Once you submit your completed questionnaire, it is archived in a database that you can access any time with an authorization code from NAR. Note that there is one authorization code per association, so everyone filling out a questionnaire from your association will be able to view the results for all questionnaires submitted for their association.

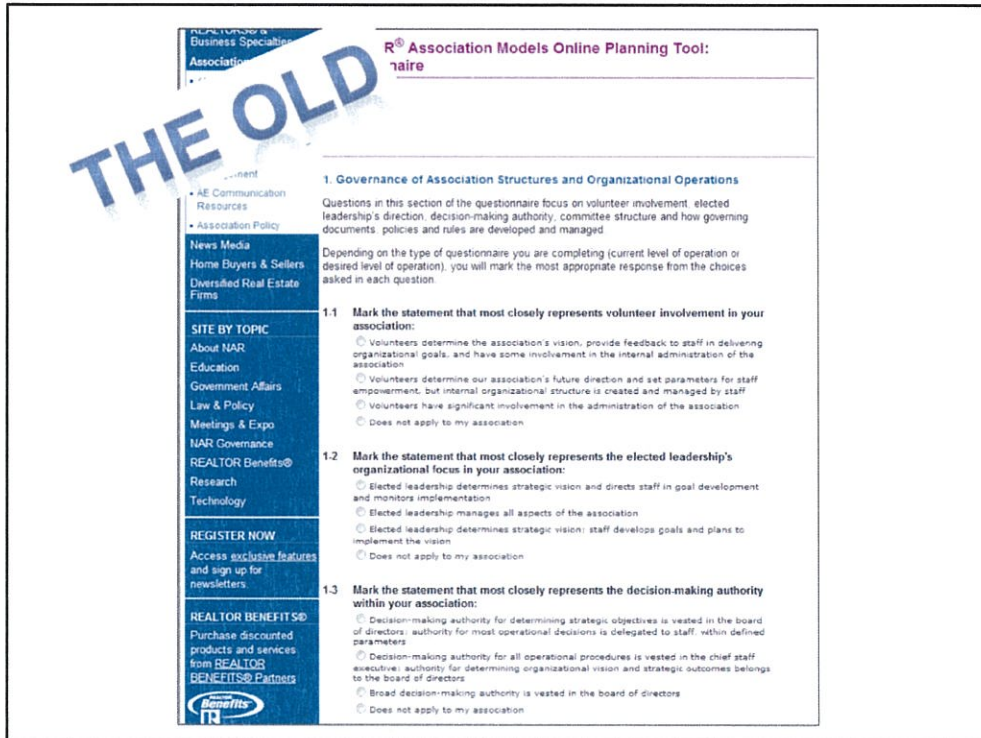
Get more information on [obtaining an authorization code for your association](#).

 [Proceed to the Questionnaire >](#)



Next, you are asked to input the *association's* NRDS ID, which can be obtained from either NAR Association Leadership Development department staff or the association's AE.

Then, it's necessary to indicate the areas of assessment questionnaire to evaluate. Please check ALL FIVE of them for a complete assessment, then click *Begin Assessment*.



This slide illustrates the questionnaire as it was before the 2011 revision. You may choose to hide this slide if you are not explaining the differences between the old and the new to your audience.

Instructions

Read through all of the questions before you begin to get a better understanding of the nature of the questions and the time you'll need. *You must select an answer for each question within each section of the questionnaire. The questionnaire now allows you to respond for both current (where your association is now in delivering services) and future (where you would like to be in terms of delivering services) operations simultaneously.*

1. Governance of Association Structures and Organizational Operations

1-1 Which statement most closely reflects the volunteer leadership's organizational focus in your association:

Current | Future

- | | | |
|----------------------------------|----------------------------------|--|
| <input type="radio"/> | <input type="radio"/> | Staff members assist volunteer leaders in determining strategic vision; staff develops goals and plans to implement the vision |
| <input checked="" type="radio"/> | <input type="radio"/> | Volunteer leaders determine strategic vision, direct staff in developing goals, and monitor implementation |
| <input type="radio"/> | <input checked="" type="radio"/> | Volunteer leaders determine the goals, and play a primary role in implementing the goals |
| <input type="radio"/> | <input type="radio"/> | Does not apply to my association |

1-2 Which statement most closely represents the decision-making process within your association:

Current | Future

- | | | |
|----------------------------------|----------------------------------|--|
| <input type="radio"/> | <input type="radio"/> | The board of directors makes decisions regarding strategic objectives; staff has the authority to make most operational decisions within defined parameters |
| <input checked="" type="radio"/> | <input type="radio"/> | The board of directors makes decisions regarding operational procedures |
| <input type="radio"/> | <input checked="" type="radio"/> | Staff leaders and the board of directors share decision-making authority for organizational vision and strategic outcomes; the chief staff executive determines operational procedures |
| <input type="radio"/> | <input type="radio"/> | Does not apply to my association |

How to Complete the Questionnaire

You'll evaluate your association in each category by selecting one response from the available choices. Read through all of the questions before you begin to get a better understanding of the nature of the questions and the time you'll need.

You must select an answer for each question within each section of the assessment questionnaire. The questionnaire allows you to respond for both current (where your association is now in delivering services) and future (where you would like to be in terms of delivering services) operations simultaneously.

Follow the directions on the questionnaire page, and answer each question for your current assessment and your desired future results. **ALL OF THE QUESTIONS SHOULD BE ANSWERED** as it will skew results if not.

INDIVIDUAL RESULTS

REALTOR® Association Models General Assessment Results

Here are the results of your assessment:

This results report lists the five major assessment areas and a breakdown by percentage of how much of an Administrative, Management, or Leadership association your processes are. Don't be surprised if your results show that your association is more like the Administrative Model in one area and more like the Leadership Model in another. Read more about [understanding your results](#).

Governance of Association Structures and Organizational Operations

	Current	Future
Administrative Model:	20%	60%
Management Model:	40%	20%
Leadership Model:	40%	20%
Does not apply:	0%	0%

Facilities, Equipment & Technology*

RESULTS CENTER

- [Understanding your results](#)
- [How questions were answered in this assessment](#)
- [Three association models](#)
- [Your customized AE job description](#)
- [Association executive interview questions](#)
- [Your customized elected leadership focus](#)

MODELS FEEDBACK

Please complete our brief survey about the REALTOR® Association Models Online Planning Tool, so we may continue to improve its effectiveness.

[Take the survey](#)

Individual Results.

This results report lists the five major assessment areas and a breakdown by percentage of how much of an Administrative, Management, or Leadership association you believe your processes are.

Don't be surprised if your results show that your association is more like the Administrative Model in one area and more like the Leadership Model in another.

Association Name:
TEST ASSOCIATION OF REALTORS®

Today's Date: 03/15/2011

Incomplete Assessments: 2

Completed Assessments: 7

REALTOR® ASSOCIATION

[Your customized elected leadership focus](#)

[Summary of your association's assessment\(s\)](#)

Section 1: Governance of Association Structures and Organizational Operations

	Current Admin	Current Mgmt	Current Ldrship	Future Admin	Future Mgmt	Future Ldrship
Q 1.1	14%	14%	71%	14%	29%	43%
Q 1.2	29%	29%	43%	0%	71%	14%
Q 1.3	14%	29%	43%	29%	0%	57%
Q 1.4	29%	0%	57%	29%	29%	14%
Q 1.5	43%	14%	29%	0%	14%	71%

Section 2: Facilities, Equipment & Technology

	Current Admin	Current Mgmt	Current Ldrship	Future Admin	Future Mgmt	Future Ldrship
Q 2.1	14%	43%	43%	29%	43%	14%
Q 2.2	43%	14%	29%	14%	43%	29%
Q 2.3	29%	29%	43%	0%	0%	86%
Q 2.4	29%	14%	43%	14%	43%	29%
Q 2.5	43%	29%	14%	14%	43%	29%
Q 2.6	57%	14%	14%	0%	57%	29%

Section 3: Staff Competencies

	Current Admin	Current Mgmt	Current Ldrship	Future Admin	Future Mgmt	Future Ldrship
Q 3.1	14%	14%	71%	0%	29%	43%

MODELS FEEDBACK

Please complete our brief survey about the REALTOR® Association Models Online Planning Tool, so we may continue to improve its effectiveness.

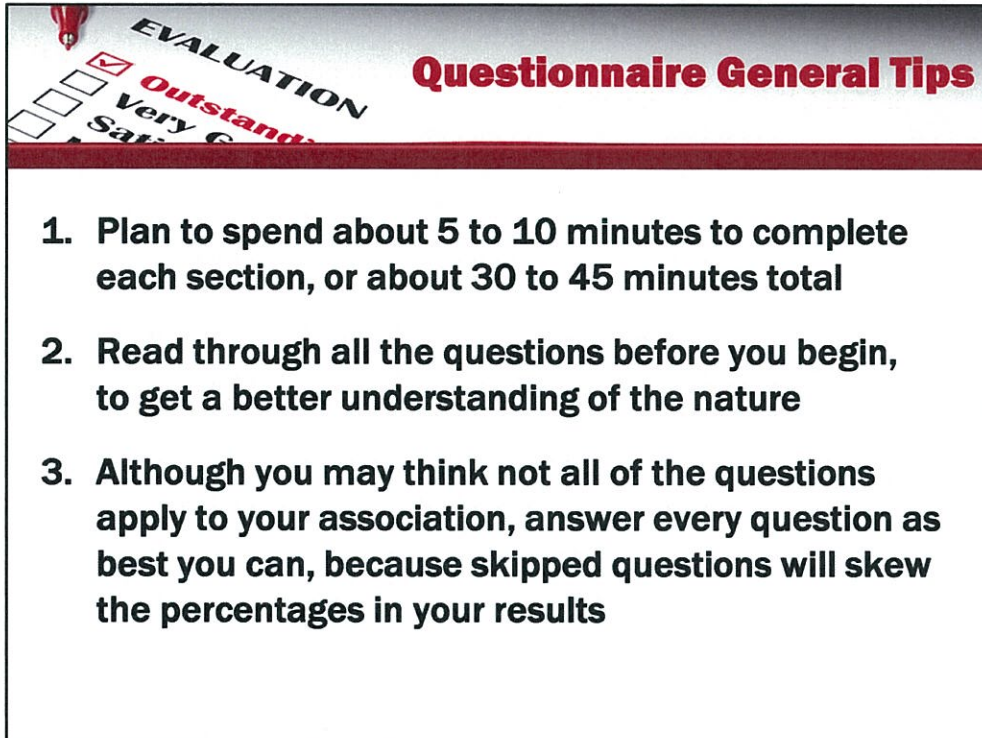
[Take the survey](#)

AGGREGATE RESULTS

Aggregate Results

This view provides an aggregate of the results compiled from all participants within an association that completed the Models questionnaire. The results provide a percentage of how each question was answered by all who completed the questionnaire. For example, the results may indicate that 25% of the respondents selected the administration response option for a particular question in the Governance section; 70% selected the management option; and 5% selected the Leadership option. From these results, you may conclude that most of your association's "stakeholders" believe that the association operates in a management mode for that area of Governance.

NOTE: The association's aggregate results may only be viewed by the Association's AE. It provides not only aggregate results but how each individual completed the questionnaire. The AE can provide the results to any facilitator working with the association on their self-evaluation. The AE will need to contact NAR Association Leadership Development staff at 1(800)874-6500 to obtain their association's code to get access.

A graphic titled "Questionnaire General Tips" with a red header. The background features a checklist with the word "EVALUATION" at the top. The checklist items are "Outstanding" (checked), "Very Good", and "Satisfactory".

Questionnaire General Tips

- 1. Plan to spend about 5 to 10 minutes to complete each section, or about 30 to 45 minutes total**
- 2. Read through all the questions before you begin, to get a better understanding of the nature**
- 3. Although you may think not all of the questions apply to your association, answer every question as best you can, because skipped questions will skew the percentages in your results**

Time Commitment

Plan to spend about five to 10 minutes responding to each of the five sections, about 30 to 45 minutes to complete the questionnaire. Read through all the questions before you begin to get a better understanding of the nature of the questions and the time you'll need.

Avoid Skewed Results

Although you may think not all of the questions apply to your association, answer every question as best you can, because skipped questions will skew the percentages in your results.

Save & Return Later

**Interruptions? No problem!
Save your incomplete questionnaire
and return to it at a later time.**



Save Your Answers and Return Later

If you're interrupted or cannot finish in one sitting, you can save your incomplete questionnaire, then return to the database to complete it at a later time. Once you submit your completed questionnaire, it is archived in a database that you can access any time with an authorization code from NAR.

IMPORTANT NOTE:

Those completing the questionnaire who need to return later will be prompted to enter their association's NRDS ID, and an authorization code prior to getting access to their questionnaire and will need to get that code from NAR or their AE.

Overcoming objections

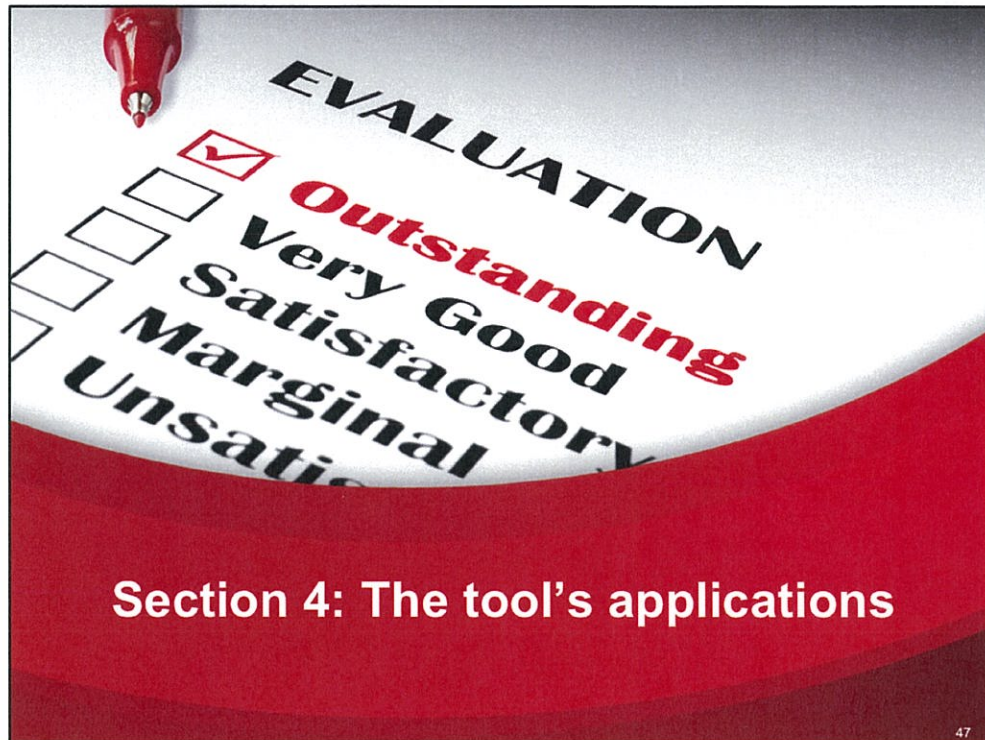


It's part of their commitment to the association!

Objections you may hear:

- Takes too much time
- I don't know how to answer

Be prepared to address each objection. The principal reason to complete this questionnaire and the process that follows it is the individual's commitment to the healthy growth of their association.



This section will examine each of the tool's applications in detail.

How You Should Use It

Strategic Planning

Structural Audit

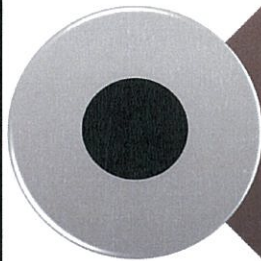
Staff / Volunteer Alignment

Personal Career Planning

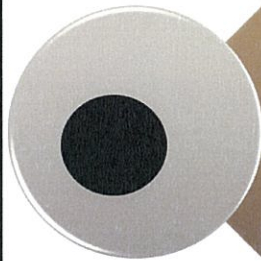
Job search, hiring & transition assistance

Here are the five primary uses of the tool.

How You Should Use It



**Strategic
Planning**



**Structural
Audit**

It's likely that the most common uses of the Tool will be for strategic planning or structural audit purposes. Utilization of the tool for those two functions are addressed in the next several slides.

Strategic Planning




1. Assess current competencies
2. Envision association's future
3. To identify gaps between where the association is now and where it wants to go



EVALUATION
 Outstanding
 Very Good
 Satisfactory

Structural Audits

1. Helps leadership identify critical areas of an association
2. Identify resources needed to achieve association's goals





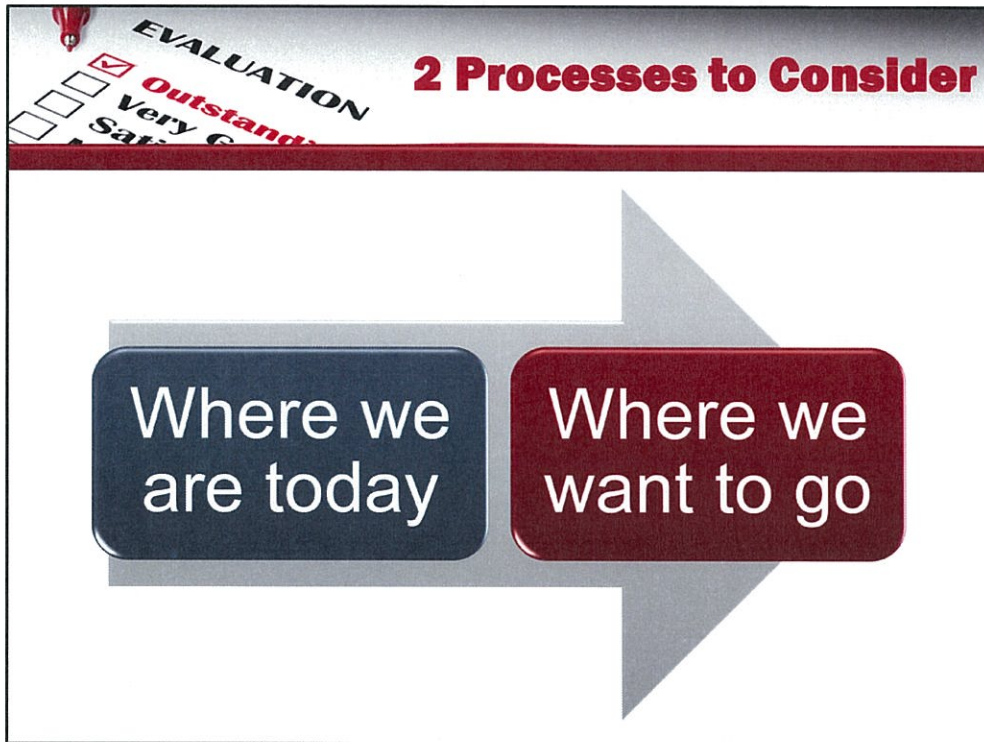
The Setup for Strategic Planning & Audits

1. Explain how the tool can help result in a better plan
2. Identify the players
3. Schedule the planning session or audit
4. Introduce the tool
5. Explain the “today” and “future” aspects
6. Determine outcomes (planning or audit)
7. Choose one of two options for taking the test:
 - ✓ As a group
 - ✓ individually



Session Preparation for the Facilitator

- 1. Compile Results**
- 2. Determine approach**
 - ✓ **Operational philosophy or**
 - ✓ **Strategy/objective development**
- 3. Draft Operational Philosophy based on the 5 assessment areas**
- 4. Create comparison data (today v. future) and identify changes desired**
- 5. Send document 1 or 2 to planning group**



EVALUATION
 Outstanding
 Very Good
 Satisfactory

**Results:
Today's Assessment**

- ✓ **Clear assessment of how planners see the association in the present**
- ✓ **Identify major differences in responses and discuss**
- ✓ **List the gaps in the analysis to address in the plan**

Where we are today

Results:
Planning for the Future

EVALUATION
 Outstanding
 Very Good
 Satisfactory

- ✓ **Assess how planners see the association in the future**
- ✓ **Identify major differences in responses and discuss**
- ✓ **List the gaps in the analysis of desired future direction**


Where we want to go

EVALUATION
 Outstanding
 Very Good
 Satisfactory

The Planning Session: Models

Explain general results
✓ **Most associations are a blend of the 3 models**

Review the association's specific results
✓ **combined answers**



A Venn diagram consisting of three overlapping circles. The top circle is light blue and labeled 'Administrative'. The bottom-left circle is dark red and labeled 'Leadership'. The bottom-right circle is dark grey and labeled 'Management'. The circles overlap in the center, and each pair of circles also overlaps.

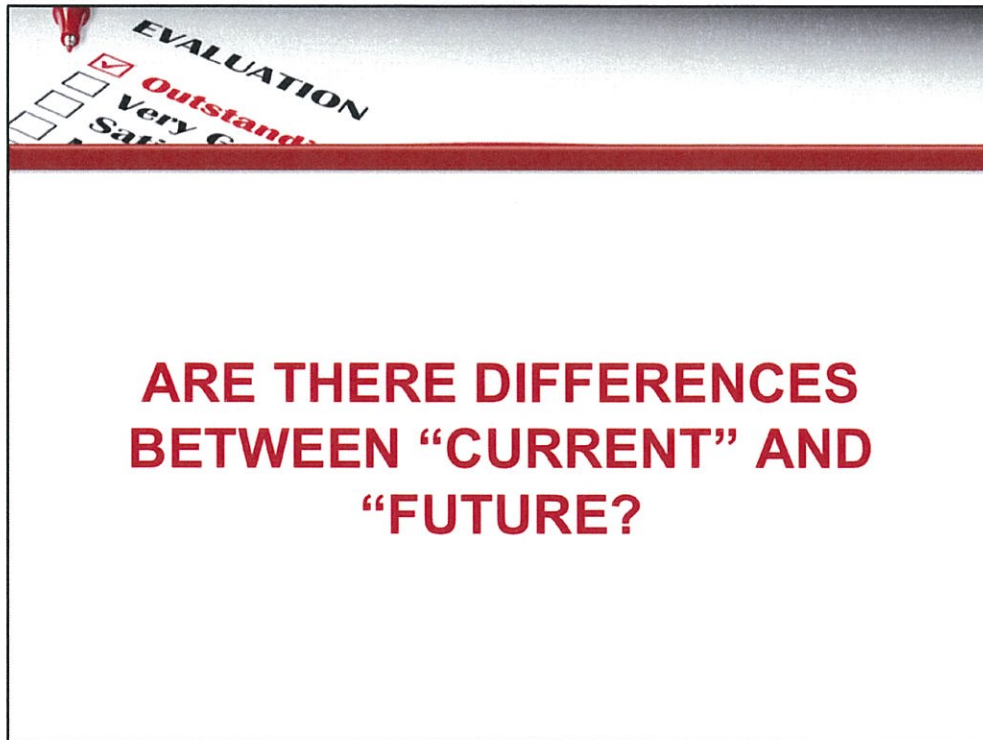
Analyzing Today v. the Future



Identify major differences in present and future analyses

Compare current resources and goals in order to determine strategies/objectives





A form to insert the aggregated answers for each question for both “current” and “future” easily pinpoints those assessment areas that need to be addressed in the evaluation process.

MODELS COMPARISON

Governance	Question	Current	Future	Code
1-1	Which statement most closely reflects the volunteer leadership's organizational focus in your association:			
1-2	Which statement most closely represents the decision-making process within your association:			
1-3	Which statement most closely represents the committee structure of your association:			
1-4	Which statement most closely reflects how governing documents, policies and procedures are developed and managed in your association:			
1-5	Which statement most closely reflects strategic planning efforts in your association:			
Physical and Financial Resources				
2-1	Which statement most closely reflects your association's physical location:			
2-2	Which statement most closely represents your association's technology resources:			
2-3	Which statement most closely reflects your association's budgeting process:			
2-4	Which statement most closely represents your association's reserves:			
2-5	Which statement most closely represents your association's non-dues revenue income:			
2-6	Which statement most closely represents your association's responsiveness to disaster planning:			

Sample Comparison Chart


Here is a sample of a form that can be used by a facilitator to compare aggregate responses from current to future. In the last column is a place for a “code” to indicate whether there was a D (difference) or N/D (no difference) in the current and future opinions. This will help a facilitator work through the differences. The facilitator may also choose to highlight the Code cell to more quickly see those that are different.

The form can be found at:
 (<http://www.realtor.org/sites/default/files/applications-and-forms/2014/models-comparison-template.pdf>)

**Integrating
the
assessment
into the plan:
an operating
philosophy**



After identifying the gaps between today and the future, identify the major goals and develop objectives to reach each goal.



An Example: developing an operating philosophy


ABC Association of REALTORS®

WHY?

- **Stale/old/un-implemented strategic plan**
- **Wanted some direction for planning the next couple of years**

The slide features a decorative header with a red and white background. On the left, there is a graphic of a checklist titled 'EVALUATION' with a red pushpin. The checklist items are 'Outstanding' (checked), 'Very Good', and 'Satisfactory'. The main title 'An Example: developing an operating philosophy' is in bold red text. Below the title, the text 'ABC Association of REALTORS®' and 'WHY?' are in bold black text, followed by two bullet points in bold black text.

The next two slides walk us through an example of an association who completed the Models exercise, why they did it and what their results showed.

An evaluation checklist graphic with a red pushpin at the top left. The word "EVALUATION" is written in a bold, sans-serif font. Below it, there are four checkboxes. The first checkbox is checked and labeled "Outstanding". The second checkbox is empty and labeled "Very Good". The third checkbox is empty and labeled "Satisfactory".

How did they do it?

1. The CEO, senior staff, and Board completed questionnaire and compiled results
2. Provided their model percentages
3. Developed an intro about their use of this tool and descriptions of each model
4. Cut and pasted their completed organizational statements from their aggregate results
5. Included it as in introduction to their Strategic Plan

The Results!

EVALUATION

- Outstanding
- Very Good
- Satisfactory

% administrative

% management

% leadership

1. Updated CEO position description
2. New volunteer leadership description
3. An operating philosophy
4. Direction for determining planning objectives for the next 2-3 years

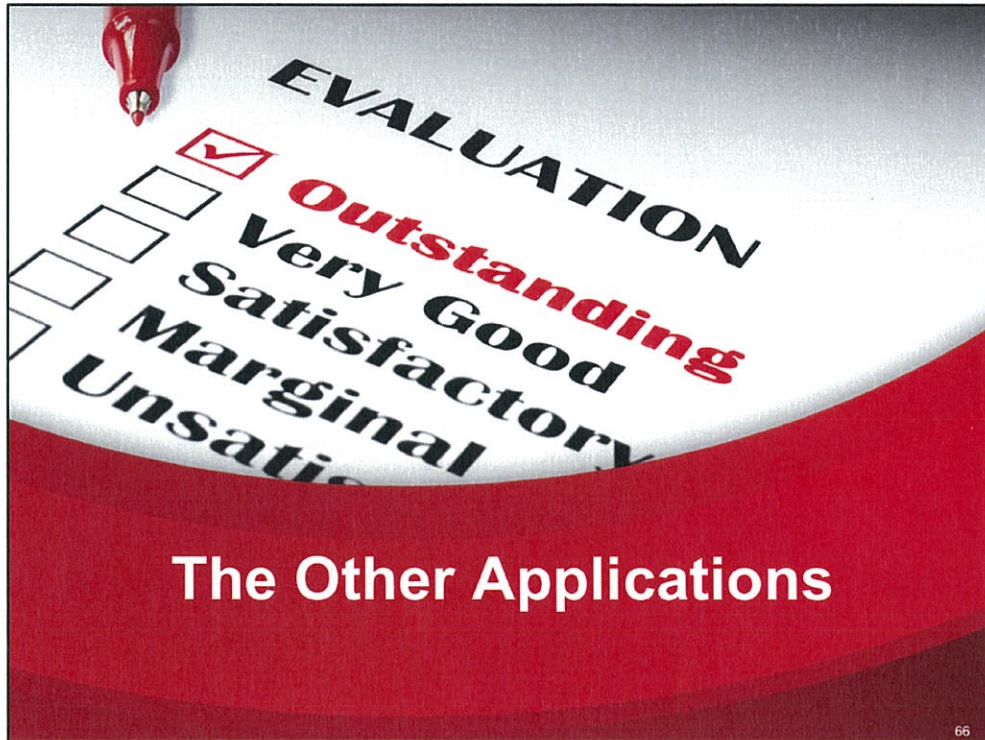
Their results allowed them to update the CEO and volunteer leadership position descriptions, an operating philosophy to guide them and their strategic plan, and specific direction the plan's objectives for the next 2-3 years.

A sample of this operating philosophy for the ABC Association can be found at: (<http://www.realtor.org/ae/manage-your-association/association-models-planning-tool/facilitator-guide/sample-operational-philosophy>)

**What if there
is
disagreement
about the
results?**



- Encourage an honest discussion about their association's resource capability and allocation.
- Review their operating philosophy (the blend of the three models).
- Keep working toward consensus.



The Other Applications

How You Should Use It



**Staff / Volunteer
Alignment**

**Personal Career
Planning**

**Job search, hiring &
transition assistance**

Other applications of this tool are explained on the next few slides.

Staff/Volunteer Alignment

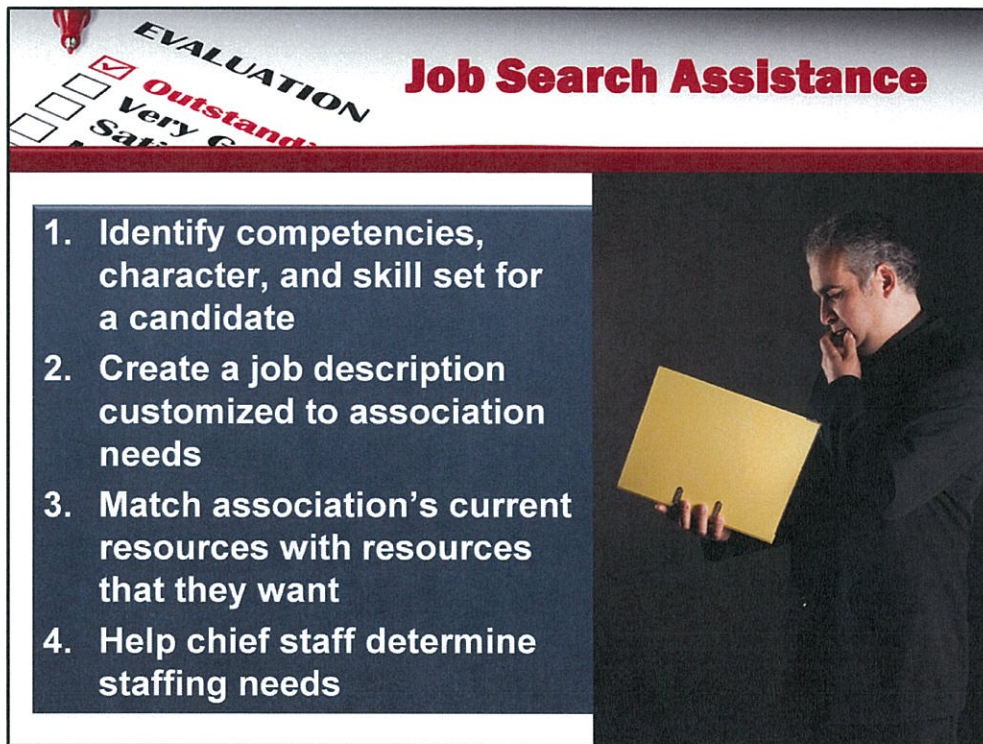
EVALUATION
 Outstanding
 Very Good
 Satisfactory

1. Align expectations
2. Identify and align staff and volunteer roles
3. Align goals with resources
4. Encourage open communication
5. Identify the “disconnects”
6. Help staff understand resource allocations

Once the questionnaire is completed, you will automatically generate a customized job description for both the AE and the President (Note: This is customized, as most associations will not fit solely into one model.)

Encourage the AE and President to review together and have an open discussion on their different, yet complementary roles and responsibilities.

For additional information visit NAR’s Volunteer Leadership Resources on R.org:
(<http://www.realtor.org/governance/volunteer-leadership-resources>)



Job Search Assistance

EVALUATION

- Outstanding
- Very Good
- Satisfactory

1. Identify competencies, character, and skill set for a candidate
2. Create a job description customized to association needs
3. Match association's current resources with resources that they want
4. Help chief staff determine staffing needs

A man in a dark suit is looking at a yellow folder or document, with his hand to his chin in a thoughtful pose.

The job description lists job duties, responsibilities, and skills needed, and can be modified based on the changing needs of the association. Since most associations will not fall solely into one model, the job description will be based on skills and functions that can be tied to more than one association model.


This is a great document to have when negotiating employment contracts, planning for AE education classes for yourself, and defining which responsibilities are typically that of the AE and which are those of the elected leadership.

Once an AE job description has been developed from the assessment, the association can access sample interview questions that can be selected from each REALTOR® association model.

EVALUATION
 Outstanding
 Very Good
 Satisfactory

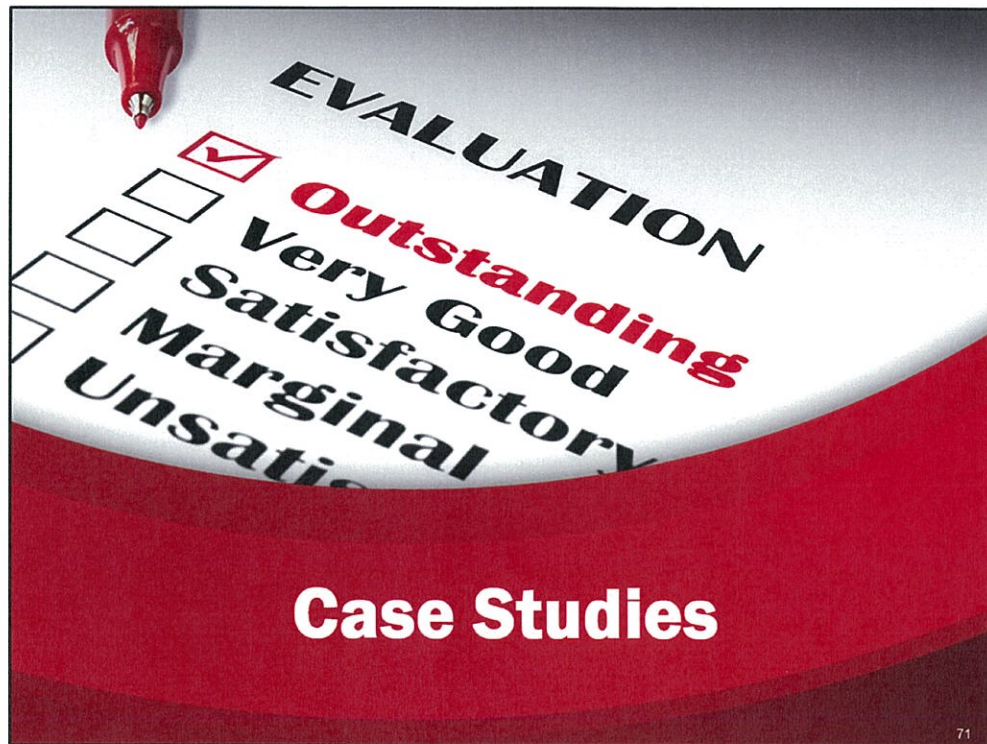
Career Planning Assistance

1. Understand the AE's job description
2. Personal SWOT
3. Identify gaps in AE's professional development. What tools are needed?
4. Ensure that the job description is in alignment with the desired model for the association.



It is recommended that the AE job description be run twice -- at the current model level and then at the desired future level.

By comparing the two descriptions, the AE will be able to identify gaps in skill sets, so that they can work towards their professional development goals.



Case studies that will help identify reasons for using the Models Tool and more can be found at:
[http://www.realtor.org/AECModel.nsf/files/Case+studies.pdf/\\$FILE/Case+studies.pdf](http://www.realtor.org/AECModel.nsf/files/Case+studies.pdf/$FILE/Case+studies.pdf)

These illustrate why an association might use this process plus give some examples of how each process works.