

### **Case study for strategic planning**

The Smallville Association president went to a conference and learned that most other associations had a strategic plan. He determined it would be valuable for his association to also have a strategic plan, so he asked the association AE to contact the state association for guidance on how they might proceed. State staff suggested that they use the REALTOR® Association Models Planning Tool and offered the services of one of the senior state staff to guide them through the process. The AE acknowledged that staff and volunteer leaders of the Smallville Association only had one full day to devote to this process, so a full-day strategic planning session was scheduled with the AE, president, and a diverse group of members.

State staff asked all planning participants, including the AE, to complete the assessment questionnaire prior to the session (either online or via hard copy), print out the assessment results, and bring them to the meeting. Participants were asked to complete the questionnaire first from the perspective of where they are currently in terms of delivering services and then again from where they want the association to be in terms of delivering services. At the meeting the planning group was divided into five teams and each team was assigned to focus on the results from one of the five sections of the questionnaire to determine how far they currently were from where they wanted to be in delivering services. The outcome of the discussions was a clear understanding of where the association wanted to be in each of the five operating areas. The state staff facilitator guided the group to then identify goal statements and strategies for how they could get from where they are now to their desired level of service. The planning group also discussed resources that would be necessary to help the association achieve their goals.

### **Case study for job search, hiring process, transition management**

Four associations are discussing a possible merger and they are trying to identify the characteristics, competencies, and skill set of the ideal AE to lead the newly formed association. The four associations pool their resources and hire a facilitator to help them identify a new AE. The facilitator asks a representative from each association to complete the REALTOR® Association Models Planning Tool from the perspective of where they want their soon-to-be merged association to be in delivering services. The representatives provide the facilitator with a printed copy of their assessment results.

The four association representatives then meet with the facilitator to discuss their respective assessment results and identify the areas in which they agree, as well as their differences. When they come to consensus on the desired level of service for their new association, the collective input from those assessment results can be used to automatically generate a job description for the ideal AE through the Models Planning Tool.

### **Case study for job search, hiring process, transition management**

Two years and three association executives later, leadership of the In and Out Association contacted NAR's Human Resources Division to help with a search for a new AE. NAR HR staff suggested that the association form a search committee to help them in this process. It became clear that the association had never identified needs, wants, and expectations of their chief staff position. They had never come to consensus on the AE's role and responsibilities in relation to those of the volunteer leadership team, nor had they identified desired skills and competencies for the AE. They had looked externally and randomly identified features they admired of neighboring association AEs, without consideration for how those features worked in their association. The only criteria they had discussed and agreed to was salary – how much they were willing to pay for an AE. Consequently the interview process had never included the right questions and did not lead them to the right candidates.

The association search committee completed the assessment questionnaire of the REALTOR® Association Models Planning Tool and generated a job description that would lead them to their ideal candidate.

### **Case study for staff/volunteer leaders alignment**

The newspaper calls AE John Smith looking for information about the housing marketing and why sales were down the last quarter. The AE discussed the statics and offered an opinion about why the market was down. The AE was quoted in the newspaper the next day. The president called the AE angry that the AE had not referred the reporter to the president to comment, after all, the president believed he was the sole spokesperson

The AE realized that the assn had never discussed roles of the AE vs. the president. The AE sets up 5 separate meetings with the executive committee at which time they review and discuss one of the five sections. The goal is to achieve agreement on each question within each section of the questionnaire. At the end of the 5<sup>th</sup> week the AE inputs all the jointly agreed upon answers into the online assessment tool. The result will produce a job description for the AE and the president outlining respective roles.

### **Case study for personal career planning**

Jane Doe has been the AE of her association for 10 years and things have been going well. The association hired a facilitator to conduct a strategic planning session, during which the online models tool was used to help them in their planning process. When the assessment results were complete the AE recognizes she may not have the right mix of skills and knowledge to meet the needs identified in the new strategic plan. As a result she seeks out professional development opportunities to improve her skills and enhance her knowledge base.