

2005 AE Institute

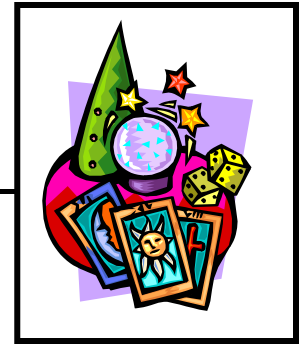


BEYOND BORDERS
Vancouver, British Columbia

Tips and Tricks for Success

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Palatine, IL

Tips and Tricks for Success



Understand Your Environment

Associations rarely run as smoothly as corporations because leadership changes every year. Or said another way - it's like a new marriage every year!

Nothing is exempt from change

- don't change for the sake of change
- cutbacks - are they in the right places?

Search for information

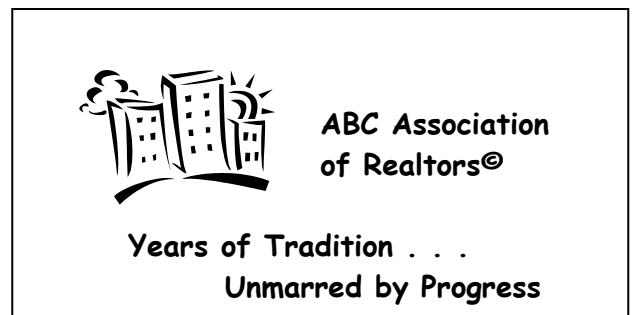
- talk to people
- associations larger than yours - same size
- don't assume what's happening in other areas is not applicable in yours - listen

Identify trends and influences

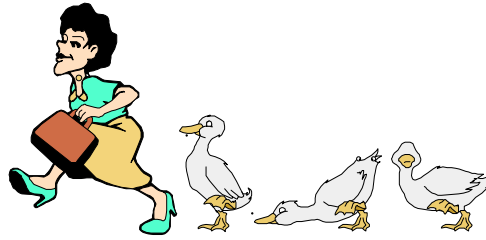
- go to meetings
- pay attention
- read
- research

Prioritize

- who are you listening to?
- must represent the entire membership
- leave your company hat at the door



Help Your New President Create Their Leadership Team



Make the members' involvement worth their time

- they need to feel their talents and expertise are benefiting the association
- tell them - communicate more than once at the beginning of the year and once at the end
- invite them to BOD meetings
- let them speak to what issues their committees feel are important

Define the committee's purpose

- Should be clearly understood by the members
- Must be compelling - what are we doing here?
- Should contribute directly to the association's mission statement and vision

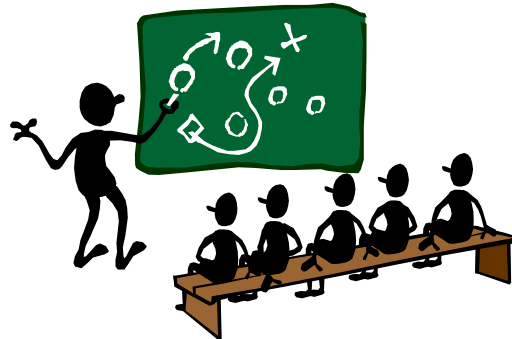
Set specific objectives and time frames - provide to all members of the committee

Chairpersons should be selected based on skills - not politics

- leadership of a committee can make or break it
- choose your chairpersons carefully

Recognize and reward efforts

- publicly if possible
- creates future leaders



President Position Description



Basic Function

Serves as the chief elected officer of the association. Oversees the affairs of the association, with the assistance of other elected officers and staff.

Responsibilities

- Presides at all meetings of the association, including the board of directors and executive committee.
- Determines the substance of the agenda for meetings of the board of directors and the executive committee.
- Appoints committees and selects chairmen for all association committees and task forces. Outlines the purposes and duties of the committees and monitors their progress.
- Keeps the membership and the board of directors informed on the conditions and operations of the association and the real estate industry, and encourages their involvement in the association.
- Serves as spokesperson for the association in conjunction with the chief paid executive officer.
- Prepares and presents an annual budget for approval to the board of directors, in conjunction with staff.
- Directs the board of directors in formulating policies and programs that will further the goals and objectives of the association.
- Conducts an annual review of organizational performance and association effectiveness, including a review of the chief paid executive officer's performance.
- Monitors expenditures to assure operation within the annual budget.
- Prepares and presents an annual report.
- Represents the association at state and national functions.

Executive Officer Position Description



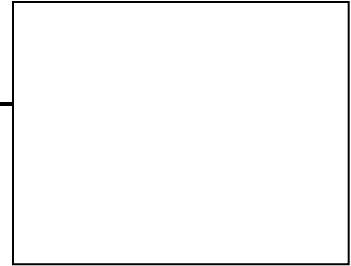
Basic Function

Serves as chief executive officer of the association and is responsible to the board of directors for the effective conduct of association affairs.

Responsibilities

- Leads the staff in accomplishing the work of the association
- Coordinates staff activities
- Assigns staff responsibilities
- Delegates authority needed to carry out responsibilities
- Supports work of volunteer committees
 - allocating resources and assigning staff
 - developing agendas
 - serving as an information resource
 - recording meetings
 - implementing decisions
- Reports and is accountable for associations' finances, programs and functions
- Initiates policy recommendations for board approval
- Helps shape association priorities
- Directs budget preparation
- Works closely with volunteer leadership in carrying out goals of the association
- Takes active role in formulating strategic plan
- Hires, fires, promotes, rewards, and disciplines staff
- Represents the association at state and national functions
- Represents the association to the public, government agencies and members
- Ensures that the needs of all the members are met

Committee Chair Position Description



Basic Function

Consistent with the association's policy and strategic plan, the committee chair guides the committee in its work as outlined by the scope of work and charge from the board of directors

Responsibilities

- With staff, develops a work plan that will allow the committee to effectively and efficiently discharge its responsibilities for the year
- With staff, develops agendas
- Conducts meetings – keeping control while allowing all members to make decisions
- Approves reports of committee meetings before their distribution
- Works with staff to ensure that the work of the committee is being carried out between meetings
- Approves reports on committee activities, including requests to the board of directors for action
- Reports to the committee on decisions of the board of directors or executive committee that affect the committee's work or activities
- Where appropriate, guides the committee in proposing products and services that will further the goals and objectives of the association
- Attends all meetings
- Is sufficiently informed to interact knowledgeably with other committee members and staff
- Supports and/or attends association functions

Staff Liaison Position Description



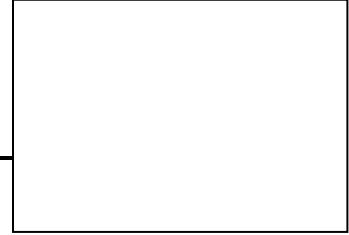
Basic Function

Serves as an informed resource person to the chair and members of the committee. Assists the chair in facilitating committee discussions and activities which address the committee's charge. Works with the chair to ensure that all committee work is consistent with the associations' goals and objectives.

Responsibilities

- Is a valuable resource to the committee, not simply a recording secretary. Note that too large a staff role reduces the value of the committee and reduces the motivation of volunteers. Too small a staff role often results in the committee's drifting aimlessly and operating ineffectively.
- Is thoroughly familiar with all aspects of the committee's work, including the scope of work, subjects under discussion and association policies related to the committee's work
- Provides thorough orientation for each new committee chair and assists the chair in providing orientation for new and continuing committee members each year
- Works with the chair to develop a plan of work that will allow the committee to effectively and efficiently discharge its responsibilities for the year
- Works with the chair to develop agendas and conduct effective meetings
- Provides administrative support for planning and execution of all committee meetings
- Drafts reports of committee meetings for review and approval by the committee chair
- Works with the committee chair, other committee members, and association staff to ensure that the work of the committee is carried forth between committee meetings
- Facilitates communication of committee activities, including requests for action and/or proposed policies, to the chief staff executive and board of directors
- Reports to the committee on decisions of the board of directors, executive committee, or other association committees which impact the committee's activities.
- Where appropriate, assists the committee in proposing products and services that will further the goals and objectives of the association.

Committee Member Position Description



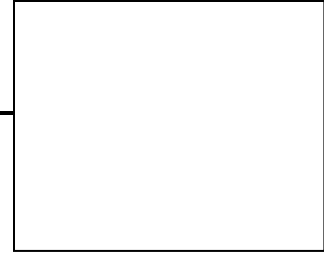
Basic Function

Reports to the committee chair. Actively participates in the work of the committee; provides thoughtful input to the deliberations of the committee; focuses on the best interests of the association and the committee rather than on personal or constituent interests and works toward fulfilling the committee's goals.

Responsibilities

- Attends committee meetings
- Reviews all relevant material before committee meetings. Makes contributions and voices objective opinions on issues
- Carries out individual assignments made by committee chair
- Works as part of the committee and staff team to ensure that the committee proposes policies and/or develops products and services that help association members and staff who are responsible for programs within the scope of interest of the committee
- Represents the committee in meetings of other association groups
- Refrains from any discussions or activities that are in violation of antitrust laws

Director Position Description



Basic Function

Actively participates in the work of the board of directors; focuses on the best interests of the association rather than personal interests and supports the association in all its goals and activities

Responsibilities

- Attends all Board of Director meetings to weigh all recommendations coming to the Board from operating committees and to vote on those recommendations in the best interest of all association members
- Sets aside the allotted amount of time to adequately give the proper attention each meeting deserves
- Adequately prepares for each meeting by reading through material sent prior to the meeting and becoming knowledgeable on all issues to be discussed
- Refrains from redoing the work of the committees
- Considers and votes on all matters pertaining to upholding the bylaws of the association and to vote on issues concerning the welfare of all members
- Ratifies professional standards decisions and keeps all confidential information confidential
- Knows and upholds the Code of Ethics and is up to date on arbitration issues
- Understands how to read the budget of the association and asks questions if necessary
- Knows and sees the big picture – how the association fits in with IAR, NAR and the changing real estate environment
- Performs the duty of Committee Liaison as outlined

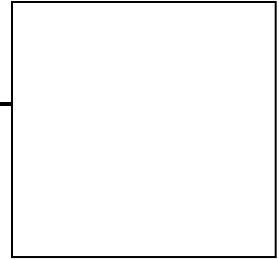
Helpful Hints for New Directors



(Not bad ideas for old ones, either)

- You are responsible for attending all Director meetings to weigh all recommendations coming to the Board from operating committees and to vote on those recommendations in the best interest of all Association members.
- It is expected that all Director's set aside the allotted amount of time to adequately give the proper attention each meeting deserves.
- It is not the Board of Director's job to redo work of the committees
- The Director is also responsible to consider and vote on all matters pertaining to upholding the bylaws of the board and to vote on issues concerning the welfare of all members.
- At certain times you will be asked to ratify professional standards decisions. You will be privileged to confidential information.
- It is necessary for you to be familiar with the bylaws of the Association.
- It will also be necessary for you to attend Professional Standards training and to be up to date on Code of Ethics and arbitration issues.
- You will be asked to approve the annual budget. You should understand how to read the budget and ask questions if necessary
- You will be expected to attend Association events.
- You will be expected to prepare for Board of Director meetings by reading through material sent to you prior to the meeting.
- Know and see the big picture. Leave your 'company hat' at the door.
- Stay out of managing the staff, that's the Executive Officer's job.
- Attend any committee meetings you're assigned to, give input to the committees and give feedback to the Board.

Developing Future Leaders

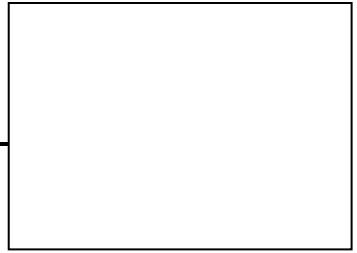


10 Qualities to Look for in a Board Member

1. Respect and visibility
2. Insight and intelligence
3. Talents and experience complementing the current board
4. Diversity
5. A proven track record
6. Integrity
7. Courage of one's convictions
8. The ability to be a team player
9. Time to serve
10. A willingness to serve the association – not use it



New Member Orientation



Suggested formats for 1, 1 ½ and 2 day orientations are included

Contents/handouts can be found at www.lynnmadison.com/AE.htm

Includes information on:

Association Overview (all 3 levels)

RPAC

Designations and Certification Programs

Safety

REALTOR® Logo and trademark issues

Antitrust Issues

Agency

Fair Housing

MLS

NOTE: You will need to modify the information to fit your Association/MLS as well as any specific state fair housing issues there may be.

New Member Orientation - One-Day Schedule

8:30 – 8:45	Registration
8:45 – 9:00	Board Services
9:00 – 9:30	Antitrust
9:30 – 10:00	MLS
10:00 – 10:15	Break
10:15 – 11:00	Fair Housing
11:00– 12:00	Agency and Forms & Contracts Overview
12:00 – 1:00	Lunch
1:00 – 4:00	Code of Ethics

General Contents

Board Services

- Committees
- 3-Way Agreement
- Benefits of Membership
- RPAC

MLS

- Basic forms/abbreviations intro
- Timelines/fines
- Commissions (ties in with antitrust)

Fair Housing

- Illinois Human Rights Act
- Advertising

Agency and Forms & Contracts Overview

- Introduce listing agreement and sales contract
- Discuss agency by use of agency forms
- Discuss and cover use of Illinois Seller Disclosure and Lead Paint Disclosure

New Member Orientation - One & ½-Day Schedule

Day One

8:45 – 9:00	Registration
9:00 – 9:30	Board Services
9:30 – 10:00	Antitrust
10:00 – 10:45	MLS
10:45 – 11:00	Break
11:00– 12:00	Fair Housing
12:00– 1:00	Lunch
1:00 – 2:00	Agency
2:00 – 2:15	Break
2:15 – 3:00	Disclosure Issues (includes forms)
3:00 – 4:00	Forms and Contracts

Day Two

8:45 – 9:00	Registration
9:00 – 12:00	Code of Ethics

General Contents *Items in italics are additions and/or changes to One-Day Program*

Board Services

- Committees
 - 3-Way Agreement
 - Benefits of Membership
 - RPAC
- Also includes safety issues, and do not call rules.

MLS

- Basic forms/abbreviations intro
- Timelines/fines
- Commissions (ties in with antitrust)
- *Internet issues*

Fair Housing

- Illinois Human Rights Act
- Advertising
- *Typical listing and selling situations*
- *Overview of Equal Service*

Agency

- ~~Introduce~~ Discuss listing agreement ~~and sales contract~~
- Discuss agency *by reinforcing license law issues*
- *Introduce and discuss use of agency forms*
- *Showing property*
- *Offer presentation*
- *Multiple offers*

Disclosure Issues

- Discuss and cover use of Illinois Seller Disclosure and Lead Paint Disclosure *including scenarios*
- *Disclosure of stigmatized properties, registered sex offenders, etc.*

Forms and Contracts

- *Introduce sales contract*

New Member Orientation - Two-Day Schedule

Day One

8:45 – 9:00	Registration
9:00 – 9:30	Board Services
9:30 – 10:00	Antitrust
10:00 – 10:45	MLS
10:45 – 11:00	Break
11:00– 12:00	Fair Housing
12:00– 1:00	Lunch
1:00 – 2:00	Agency
2:00 – 3:00	Disclosure Issues (includes forms)

Day Two

8:45 – 9:00	Registration
9:00 – 12:00	Sales Contract
12:00 – 1:00	Lunch
1:00 – 3:30	Code of Ethics

General Contents *Items in italics are additions and/or changes to One-Day Program*

Board Services

- Committees
 - 3-Way Agreement
 - Benefits of Membership
 - RPAC
- Also includes safety issues, and do not call rules.

MLS

- Basic forms/abbreviations intro
- Timelines/fines
- Commissions (ties in with antitrust)
- *Internet issues*

Fair Housing

- Illinois Human Rights Act
- Advertising
- *Typical listing and selling situations*
- *Overview of Equal Service*

Agency

- ~~Introduce~~ Discuss listing agreement ~~and sales contract~~
- Discuss agency *by reinforcing license law issues*
- *Introduce and discuss use of agency forms*
- *Showing property*
- *Offer presentation*
- *Multiple offers*

Disclosure Issues

- Discuss and cover use of Illinois Seller Disclosure and Lead Paint Disclosure *including scenarios*
- *Disclosure of stigmatized properties, registered sex offenders, etc.*

Note: Major difference between 1 ½-Day and 2-Day is the complete coverage of the sales contract

