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August 2015

An Afternoon with Incoming Realtor® President

It's not about a personal agenda.

Success for the incoming Realtor® association president is crucial. A bad year can drive away members, disappoint volunteers, and damage staff relations. A good year begets good future leaders.

The president sets the tone, course and pace for the year. It's not about a "personal agenda" or legacy. The foremost question the incoming president should ask before the term begins is, "Where is our strategic plan? My job is to advance that plan."

The president should have a vision of what success looks like, developed through consensus with other leaders and staff. The teams overall goals is to improve the profession and the community.

There are several measures of performance but the most important is that the association will be as good or better than when this year's president took office. Broken down into metrics, the indicators might include more members, successful advocacy, great R-PAC contributions and increased revenue, for instance¹.

A Few Hours Yields Results

Spend a morning or afternoon with the incoming president a month or so before they are installed. The outcomes will be enhanced understanding, improved outcomes and a stronger leadership – staff team.

To gauge the incoming president's preparedness I ask, "What are your goals and how do they fit in our strategic plan?"

Admittedly, when I ask the question of next year's president the response is often a deafening silence. They confess to procrastination followed by a potpourri of low-level tactics mixed with a personal agenda. What one expects from the incoming leader is a clear, concise statement about advancing the mission, serving industry needs and maintaining a high performing organization.

¹ The association should be run like a business with performance measures agreed upon and monitored.

Key Questions and Discussion Points

Schedule a conversation a month or more before installation. Start with seven questions about priorities, responsibilities and communication. Within each question is a key point not to be overlooked.

1. What are your goals?
2. Do your goals fit within the strategic plan?
3. Do you have buy-in from the leadership team, officers?
4. Are you familiar with the governing documents?
5. How conversant are you with the budget and association's resources?
6. Who will speak for the association?
7. Have you thought about how to frame your message?

What are your goals? Some leaders cannot articulate their goals even though an installation speech is approaching and the president's message is due.

Goal Oriented: Select just two or three priorities of interest to the broadest membership. It is easier to remember far more impressive for a president to be able to articulate just three goals than to spout off a to-do list of tasks. Relate them to the mission and strategic plan. Keep them broad to maintain respect and interest of all members, for example, "to protect our profession, add value to membership, and improve awareness of our association." Note: Where meetings are monthly, if there is not purpose for the meeting, postpone it --- don't let past culture dictate that you must meet every month.

Do your goals fit within the strategic plan? A prior board adopted a multi-year strategic plan, approved to meet NAR Core Standards. The president's role is to advance the plan.

Roadmap: The president is the "driver of the bus" and the strategic plan is the "road map." The president is not there to create a legacy, but to work the plan. If a president or committees suggest new projects, the leadership team should ask what can be removed from the existing plan to free-up resources.

Do you have buy-in from the leadership team, officers? The president must build a team that understands and shares the priorities for the year.

Consensus: Before installation, the president should communicate the year's priorities and theme to the executive director, board and committees. Build support for a year-long program of work and a vision of what success looks like. When meetings are called directors want to know they have a purpose and intended outcome built around the mission and plan.

Are you familiar with the governing documents? The truest saying is, “you must read to lead” --- starting with the governing documents – especially bylaws and policies. .

Reading: A good president can cite the governing documents. These documents describe board’s authority and limitations. Members have a right to enforce compliance where bylaws have been abused.

Rules of Order: Meetings run smoother when a set of rules or parliamentary procedures are used. Understand the basics; using them to facilitate meaningful discussions and complete business by the meeting adjournment.

Gavel: The gavel is a way to keep the meeting moving forward. A “heavy gavel” refers to a president who is able to suggest it is time to move on and not get waylaid by long winded reports or history. The gavel does not come with the powers of a crystal ball or magic wand ---- nothing can replace preparation and hard work.

How conversant are you with the budget and association’s resources? The incoming president should be comfortable about all aspects of the budget, financial policies, safeguards and operating ratios.

Resources: Often directors focus on the minutiae of a budget. For example, “What’s this \$75 line item?” Yet the budget and savings are significant amounts. (Many directors find it easier to question minute details rather than focus on big picture.) Be able to cite the size of the annual income and amount of assets. If the board needs a refresher on the topics of generally accepted accounting principles, IRS expectations or financial policies, invite a CPA to address the board. Always remember that every cent belongs to the members and the board is responsible for safeguards.

Who will speak for the association? Most organizations expect the president to be the primary spokesperson. That responsibility may be delegated, especially to the executive director.

Communication: Prepare to be the association’s spokesperson by honing communication skills and/or delegating authority to staff. Be clear that volunteers do not usurp the authority of the president in representing the organization. Adhere to an organizational chart depicting lines of communication and hierarchy.

Implied Authority: Associations have policies that boards and committees do not have business cards or stationery that would indicate they are speaking on behalf of the organization. Nobody’s position may not be used for personal gain or to imply they are speaking for the association.

Have you thought about how to frame your message? The “president’s message” is the opportunity to communicate the mission, priorities and progress.

Messaging: Use the president’s message afford opportunities to communicate priorities and celebrate successes. Plan the year at the state. The first message should build on the mission and goals. During the year promote accomplishments. Wrap up the final president’s message by promoting success and how the mission and strategic plan were advanced. Avoid phrases like, “the year went by too fast,” “I wish I had more time.”

Team: Promote the team, including board, committees and staff. It’s not about the president’s achievements. A great president readily gives credit to others.

An afternoon discussion with the incoming president can yield a year’s worth of results.

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Note: Bob Harris, CAE, provides governance tips and templates at www.nonprofitcenter.com. There are many organization’s with resources for incoming presidents; don’t let the year pass without identifying resources and using them to support your success.