Exceptional Chapter Leadership

Who The Heck Is Ginger Downs?

REALTOR® AE since 1983
CEO for Chicago since Oct 2005
Managed 6 local Associations
250 - 18,000 members

Your Chapter can’t be EXCEPTIONAL if you don’t challenge yourself

Policies are your “friends”

Financial Management

Your IREM Chapter Roadmap for the Year

Study this document
Work towards a Best Practices Chapter

Bank Account
Key Documents
Budget
Financial Review
Investments
Policies and Standards
Reserves

Minimum Standards and Best Practices Guide for Chapters
To ensure that the Chapter achieves its mission and vision, by focusing upon and successfully executing its strategic and business plans.

Leadership Support

- Succession Plan
- Strategic Plan
- Annual (Business) Plan
- IREM Meeting Participation
- Executive Council
- Training
- Mentoring & Recognition

Leadership at IREM

Industry Engagement & Member Services

- Recruitment & Retention
- Education & Credentials
- Events/Programs
- Legislative Outreach
- Chapter Communications
- Surveys
- Public Relations
- Foundation
- Community Outreach
- Academic Outreach

Administration

- Governance
- IAE Employment
- Elections
- Crisis & Risk Management
- Database Mgmt & Security
- Trademarks & Branding
- Membership Notices
- Social Media
- Licenses
- Antitrust

Our focus for today

- Successful Planning
- Conduct A Value Audit
- Leadership Transition

Bonuses Information:
- Volunteer Engagement

STRATEGY
↓
EXECUTION
↓
SUCCESS

Plan & Execute for Success

Your Leadership Mission

Ginger Downs, RCE, CAE, CIPS, IOM
CEO, Chicago Association of REALTORS®
Why bother with annual planning?

It creates a more efficient and effective Chapter

Time to PLAN

What's your planning process?

Activities are driven by...

Is your Plan aligned with IREM’s Plan?

Successful planning includes

Ginger Downs, RCE, CAE, CIPS, IOM
CEO, Chicago Association of REALTORS®

2017–2020 Strategic Plan

Goals

• Where do we want to go?

Strategies

• How do we get there?

Measures

• How do we measure success?

Outcomes

• How did we do and how can we improve?
**Recommended flow of Chapter activities**

Begin annual planning with a SWOT analysis

It forces you to articulate your competencies and weaknesses

**Next steps are to identify**

**Develop your Annual Action (Business) Plans**

Develop an annual Chapter Action Plan based on IREM’s Strategic Plan

- Strategy
- Budget
- Tactics
- Key Performance Indicators
- Status updates
- Responsible Committee(s)

**Plan for contingencies**

What if you don’t achieve your planned activities?

- **Plan A**
  - Complete Success
- **Plan B**
  - Partial Success
- **Plan C**
  - Failure

**Assess performance throughout the year**
Turn failure into a learning opportunity

Sometimes You WIN, Sometimes You LEARN!

S.W.O.T. Analysis

<table>
<thead>
<tr>
<th>Strength</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Weakness</td>
<td></td>
<td></td>
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<tr>
<td>Opportunity</td>
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<tr>
<td>Threat</td>
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</tbody>
</table>

Prioritized Initiatives

<table>
<thead>
<tr>
<th>IREM Chapter:</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Dollars</td>
<td>Outsourcing/Staff</td>
<td></td>
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<tr>
<td>Priority #1</td>
<td></td>
<td></td>
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<tr>
<td>Priority #2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority #3</td>
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</tbody>
</table>

Critical Needs

<table>
<thead>
<tr>
<th>IREM Chapter:</th>
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</thead>
<tbody>
<tr>
<td>Critical Need #1</td>
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<tr>
<td>Critical Need #2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Critical Need #3</td>
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</tbody>
</table>

Questions about planning?

ANY QUESTIONS?

Conduct a Value Audit
**Why Members belong**

1. Shared interest or cause
2. Influence, access and prestige
3. Image, knowledge and credibility
4. Business opportunities
5. Tangible services

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**5 types of Members**

- **Collegial Members**
  - Shared cause

- **Power Members**
  - Personal and/or professional influence

- **Benefits Members**
  - Want tangible services
  - Education
  - Networking
  - Advocacy
  - Information & Publications
  - Discounts

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**So, what do they value?**

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**The Value Proposition**

**You need to know 3 things:**

1. What motivates each type of member?
2. What do they value?
3. Can we hit the mark?

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**What do they VALUE?**

- **Cause**
- **Services**
- **Benefits**
- **Resume**
- **Image**
- **Power Members**
- **Influence**
- **Checkbook Members**
- **Business**

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**Value is a moving target!**
Value Proposition questions

As Leaders, discuss the following questions so that you can uncover and develop your organization’s value proposition:

1. What services do we deliver that members consider invaluable?
   - How do you know this? Have you surveyed members?
   - Do we communicate this value to members?

2. How do our key services and programs contribute to our members’ success?

3. Do we know what business issues keep our members up at night?

Value Proposition

<table>
<thead>
<tr>
<th>FEATURES</th>
<th>BENEFITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>More knowledge on topics which I want to know about.</td>
</tr>
<tr>
<td>Networking</td>
<td>Meet and connect with other real estate professionals.</td>
</tr>
<tr>
<td>Information &amp; Publications</td>
<td>Provides me with knowledge I can pass on to clients.</td>
</tr>
<tr>
<td>Discounts</td>
<td>Savings to members on services or items they value</td>
</tr>
</tbody>
</table>

Members DON’T CARE! Members DO CARE!

Features ➔ Benefits ➔ Value

<table>
<thead>
<tr>
<th>FEATURE</th>
<th>BENEFIT</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>More knowledge on topics which I want to know about.</td>
<td>I will provide more value to my customers</td>
</tr>
<tr>
<td>Networking</td>
<td>Meet and connect with other real estate professionals.</td>
<td>Establish and enhance relationships. Increases my opportunity for more business.</td>
</tr>
<tr>
<td>Information &amp; Publications</td>
<td>Provides me with knowledge I can pass on to clients.</td>
<td>I will provide more value to my clients than my competitors.</td>
</tr>
<tr>
<td>Discounts</td>
<td>Savings to members on services or items they value</td>
<td>I can use the savings for other things that I value or need.</td>
</tr>
</tbody>
</table>

Steps to conduct a Value Audit

Analyze what services members purchase.
Interview leaders on trends (active or not)
Create a feature and benefit matrix
Conduct a member value audit

Critical Question #1

Indicate how much value you place on the following items:

<table>
<thead>
<tr>
<th>FEATURE</th>
<th>Value</th>
<th>Very High Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>Networking</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>Information &amp; Publications</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>Advocacy</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>Discounts</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
Critical Question #2
Indicate how helpful XXX is in helping you reach these goals:

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
<th>Education</th>
<th>Networking</th>
<th>Information &amp; Publications</th>
<th>Advocacy</th>
<th>Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very Low Value</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td></td>
<td>Very High Value</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Increases my knowledge on selected topics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meet and connect with other RE professionals</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Provides me with knowledge to pass to clients</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Get new business ideas to grow my business</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Protects my business interests</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Protects my clients' real estate</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Savings on services and items I need or want</td>
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</tbody>
</table>

What action should you take?

<table>
<thead>
<tr>
<th>Action</th>
<th>Member Value</th>
<th>Organization Helps Achieve</th>
<th>Alignment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strength</td>
<td>High score</td>
<td>High score</td>
<td>Aligned</td>
<td>None Needed</td>
</tr>
<tr>
<td>Weakness</td>
<td>Low score</td>
<td>Low score</td>
<td>Aligned</td>
<td>Stop this service</td>
</tr>
<tr>
<td>Opportunity</td>
<td>High score</td>
<td>Low score</td>
<td>Misaligned</td>
<td>Examine how to offer more of this service</td>
</tr>
<tr>
<td>Threat</td>
<td>Low score</td>
<td>High score</td>
<td>Misaligned</td>
<td>Work to eliminate this service</td>
</tr>
</tbody>
</table>

Questions about a value audit?

Alone we can do so little, together we can do so much."
--Helen Keller

It's always a team effort!

An image of Ginger Downs, RCE, CAE, CIPS, IOM, CEO, Chicago Association of REALTORS®

It's NOT about your legacy, rather it's about the continuation of the Strategic Plan
Seamless transitions
1. Are intentional
2. Happen all year long
3. Require a consultative attitude
4. The Chair, Vice Chair and IAE focus together on the important issues facing the chapter
5. Adopt a transition plan, should there be an unexpected interruption in key leadership.

Start with planning as a team
Meet to plan out the year’s activities, timelines and budgets
Set mutual goals
Ensure the VC is prepared to step in for the Chair
Connect regularly

Build your Chapter’s leadership bench

Build your leadership bench
1. Create leadership development opportunities for volunteer leaders to expand their skills
2. Train, train and train
3. Coach, mentor and guide newer leaders
4. Let newer leaders actually lead
5. Connect on a social level

Questions about Leadership Transitions?

Build an Exceptional Volunteer Team

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CEO, Chicago Association of REALTORS®
IREM Exceptional Chapter Leadership

Be intentional about diversity

Work to attract young professionals

Your future leadership
Train them to be leaders
Give them responsibilities
Realize they do things differently and embrace their differences

Why they volunteer
1. Shared interest or cause
2. Gain knowledge and credibility
3. Influence, access and prestige
4. Create business opportunities
5. Network with other professionals

Recruitment
1. Issue an invitation to serve
   - Personal invite
   - Through IAE
   - Online
2. Have descriptions
   - Job Description
   - Describe activities
   - Describe requirements
3. Encourage applicants to contact you or the IAE with any questions

Peer-to-Peer testimonials from volunteers are POWERFUL

The Application
Resume and photo
   - Community involvement
Business specialty
IREM or other Certifications
Description of Committees
   - Requirements
Why do you want to serve?
   - Beyond “Giving Back”
What are your talents and skills?
What do you like to do?
**IREM Exceptional Chapter Leadership**

- **Align skills & tasks**
  - Policy creation
  - Event planning
  - Developing education programs
  - Fundraising
  - Coalition Building
  - Business/financial acumen
  - Promoting the organization

- **Hold an Orientation**
  - IREM and your Chapter
    - Basics, policies, programs
    - Governance structure
    - Strategic and Business plans
    - Budget
    - Protocols
    - Expectations

- **Develop a positive volunteer culture**
  - Communication
  - Understanding
  - Listening
  - Teamwork
  - Unified
  - Respect
  - Encouragement

- **Keep great volunteers**
  - Don't waste their time
  - Give them a job to do
  - Hold them accountable
  - Respect them
  - Thank them
    - Frequent and in public
  - Make it fun

- **Keep great volunteers**
  - Ask for feedback on:
    - Communications
    - Systems and processes
    - Training
    - Programs
  - How can we make it a better experience?
  - Ask them to serve again
    - Same or different capacity

- **Challenge yourself and be remarkable!**
  - Give people a great reason to talk about your Chapter!