

Roadmap to Leadership: Guide to Association Involvement

Course Three: Leading the Organization





Roadmap to Leadership

Guide to Association Involvement

Course Three: Leading the Organization

Participant Manual

Topic	Page
Welcome!	2
Leading the Organization	2
Leading Effective Meetings	2
Leading through Public Speaking	6
Leading with Diversity, Equity, & Inclusion	8
Leading through the Budget Process	11
Leading the Organization - Next Steps	13

Texas REALTORS® would like to thank the Leadership Development Advisory Committee for their contributions to these course materials.

Use of these materials is intended for Texas REALTORS® education purposes for this specific course. Any unauthorized use or reproduction without the written consent of Texas REALTORS® is expressly prohibited.

Welcome!

The Roadmap to Leadership *Guide to Association Involvement* is a three-course series intended to give Texas REALTORS® members an in-depth view of the organization, how decisions are made, and how to get involved. We hope you learn from the resources that will be discussed, and that you take advantage of the opportunity you have been afforded to increase your participation at the state and national level.

Leading the Organization

This course covers a broad range of topics relevant to aspiring association leadership and gives the opportunity to make plans for your next steps in association involvement.

Leading Effective Meetings

While the following was written with the local association leadership in mind, the principles discussed apply across the board.

Why is it important for your local association to have meetings? Not only do most corporate state laws require it, but it's where you conduct business. In other words, it's where stuff gets done. In fact, Texas law requires that your association hold an annual meeting of the members unless your bylaws provide for more than one regular meeting each year. Other meetings can include director meetings, committee meetings, and meetings of other association groups. Regardless of what type of meeting you're having, follow the tips below on how to run a successful meeting for your local association.

Planning

The first thing you should do before a meeting takes place is plan for the meeting. Provide sufficient notice, create the agenda, and distribute materials in advance. You must follow the notice requirements in your bylaws for regular and special meetings. Written notice must include the place, date, and time. If the meeting is a special-called meeting, the written notice must also include a purpose. This allows the intended audience to be notified in advance and to ensure a quorum is present. A quorum is the minimum number of people who must be present to conduct business. Generally, you have a quorum when a majority of the number of people with voting authority for that body are in attendance, but be sure to check your bylaws for how a quorum is defined for your association. For example, if your bylaws call for a majority and your board of directors consists of 40 members, 21 members must be present. A committee with 13 members must have seven members in attendance.

Agenda

The agenda lists the topics to be discussed at the meeting. Preparing an agenda ahead of the meeting provides structure to the meeting and prevents unrelated topics from being discussed during the meeting. Providing the agenda prior to the meeting allows members to review discussion items ahead of time and come prepared. It also helps you start and end the meeting on time.

Purpose

Successful meetings have a purpose, and it should be related to association business. Be sure there is a reason to meet and only call meetings as needed. Participation As a leader, you're required to attend regularly scheduled meetings. Your fiduciary duty of care requires you to prepare for, attend, and pay attention during meetings. You should have already reviewed the agenda and materials prior to the meeting. It is also important to arrive on time.

Etiquette

A meeting is a place for members to share and discuss ideas. Follow these tips for proper etiquette during meetings:

- Ask questions
- Invite discussion
- Encourage participation
- Respect people and ideas
- Listen carefully
- Refrain from distractions.

Recordkeeping

A written record, or minutes, should be recorded for every meeting and should include the time, place, and date of the meeting. Complete and accurate minutes are essential because meeting minutes are an official record of actions taken at a meeting. This will protect those in attendance and the local association.

Keep these meeting tips in mind

Confidentiality. Meetings are a safe place for open discussions without fear of information leaking. Ensure confidentiality if required. If you're uncertain about whether a discussion item is confidential, seek advice from your local association's legal counsel.

Avoid antitrust. Be mindful of possible antitrust violations.

Understand rules of order. Know the basics of parliamentary procedure and review your bylaws to ensure proper procedure is followed. Your bylaws may reference the latest edition of Robert's Rules of Order.

Some additional recommendations

If you are involved with the planning of state and/or national association meetings, you will work closely with the staff liaison for that committee. At the state level, every committee has a staff liaison. They will provide the structure for how meetings should be conducted, help set the agenda and dates, push out the necessary documents for the meetings to committee members, and assist with posting minutes and committee reporting.

Robert's Rules and Other procedures make your meetings better for all involved.

Parliamentary procedure enables a governing board to efficiently make orderly decisions while ensuring that all the members of the board have an opportunity to express their opinions. Here are some basic parliamentary rules to help you navigate association board meetings.

Robert's Rules of Order

Robert's Rules of Order is a standard set of rules that enables you to run orderly meetings and provide fairness to all members of the governing body. Many local associations have adopted Robert's Rules of Order as the parliamentary authority governing association meetings. Check your bylaws to see which rules rule your meetings.

Meetings

Every meeting needs:

- Chair - someone to preside over the meeting
- Secretary - someone to record the meeting
- Quorum - the number of people required to make a decision that will affect the entire membership. Check your bylaws to know your board's quorum requirements. Sometimes, meetings need notice. Your association's bylaws likely contain provisions requiring voting members to

receive notice of certain types of meetings, or meetings that will include certain actions.

- For example, notice may be required for:
 - Special-called meetings
 - Consideration of proposed amendments to the association's bylaws
 - Consideration of suspending or expelling a member.

Minutes

Minutes are a written record of what was done in the meeting. The approval of minutes requires only unanimous consent; it is not necessary to pass a motion to adopt the minutes.

Minutes should contain:

- Type of meeting that occurred (regular or special)
- Name of the governing body
- Date, time, and place of the meeting
- Presence or absence of the chair and secretary; names of their substitutes
- Previous minutes read and approved
- Motions
 - According to Robert's Rules of Order, the name of the maker of the motion should be stated in the minutes. However, some bodies omit the name of the maker of the motion and only record the motion, that the motion was properly made and seconded, and the outcome. If your association prefers to follow this procedure, it may be prudent to adopt a standing rule that minutes will not record the name of the maker of the motion.
- The minutes should not include details regarding discussion of the motion.
- Notices of motions for future meetings
- Time of adjournment.

Have your local association counsel review meeting minutes as necessary and be sure to properly discard any drafts or notes.

Motions

The procedure for handling motions consists of these steps:

- A member of the body is granted the floor (recognized) by the chair.
- The member makes a motion: "I move that"
- Another member seconds the motion: "I second" or "I support" is sufficient.
- The chair restates the motion to ensure all members of the body understand the motion.
- The chair opens the floor for debating the motion (discussion) and ensures all members have an opportunity to speak on the motion.
- The chair puts the motion to a vote.
- The chair announces the result of the vote.

Amendments to Motions

If an amendment to a motion is offered, the amendment takes precedence over the motion. The amendment must be adopted or defeated before the motion can be voted on. If the amendment is adopted, the main motion is then taken up, as amended. If the amendment is not adopted, the main motion is then taken up without the amendment.

The So-Called Friendly Amendment

There is no such thing as a friendly amendment to a motion. Even if the author of the main motion agrees with the amendment, the amendment must be debated and passed prior to it being made part of the main motion. The maker of the main motion cannot unilaterally accept it.

When a Motion is Not Necessary

A motion is not needed:

- To approve a previous meeting's minutes
- To adjourn the body.

Both of these actions can be approved by unanimous consent of the body. Voting There are various ways to take votes at meetings. Votes are generally taken by voice vote: "All in favor say aye" and "All opposed say nay." If that type of vote does not indicate a clear result, other types of voting may be necessary. These include a rising vote, a counted rising vote, and a vote by ballot or roll call.

CHECKPOINT

Answer the following questions:

1. Besides conducting business, what other benefits do meetings provide?

2. Have you seen instances of meetings that did not go well? Why did they not go well?

Leading through Public Speaking

Texas REALTORS® Spokesperson Training

This course, created and maintained by Texas REALTORS®, builds participants' public speaking competence and confidence. It combines lecture and videotaped exercises, using real-world issues in Texas real estate. The real estate professional will learn how to prepare themselves to address issues, answer questions and represent the real estate industry in a professional manner. As a result of attending this course the real estate licensee will enhance their presentation skills in preparation for working with clients, other real estate professionals and the community at large on a day-to-day basis. It will raise their level of confidence and competency when representing the real estate industry regardless of the environment.

Spokesperson Training Tips for Leaders

Presenting information clearly and effectively is critical in your role as a leader. You have a unique perspective that can influence others to support organizational goals. As a spokesperson, you can boost the visibility of your organization and its members by sharing valuable information and rallying others to take action. During the spokesperson training class session taught through the Texas REALTORS® Leadership Program (TRLP), instructors share presentation best practices and help hone the talents of association leaders through live practice. Here are a few of the tips shared during that course.

Know your Audience

Before you begin to develop your message, be sure you know who your audience is. Think about what makes your topic relevant to them. Ask yourself: "Is there a way to make this meaningful?" and "Why would those in the audience care about this information?" Also be aware of industry jargon. Acronyms you use with your business colleagues will probably not resonate with people outside the real estate industry. Before speaking to the media on behalf of your organization, get familiar with your association's communications protocols. Find out who the designated spokesperson is for your organization and learn the process for managing media interviews.

Know your Aim

The purpose of your presentation is extremely important in crafting what you will say. What's the one key takeaway you'd like the audience to get from your presentation? Some presentations are designed to influence audience members to respond to a specific call to action, while others are intended to create awareness through the sharing of new information. Knowing your aim will help you construct your message and decide which stories to include. Sharing personal experiences, imagery, and analogies throughout your presentation also supports your purpose and enables audience members to visualize key concepts more vividly. Most presentations begin with a strong introduction followed by three to five supporting points and a conclusion that summarizes your talk.

How do you sign up for Spokesperson Training?

Spokesperson Training is offered as part of the TRLP (Texas REALTORS® Leadership Program) and often during the BOLC (Board Officer Leadership Conference) meeting.

CHECKPOINT

Develop a 30-second introduction you can use in the following role play scenario:

You are the president of your local board, meeting the NAR president for the first time. You are in an elevator and only have 30-seconds to introduce yourself.

Include who you are, where you are from, and ask for involvement from NAR leadership.

Leading with Diversity, Equity, & Inclusion

Thoughtful and informed diversity, equity, and inclusion programs have been shown to increase membership in an organization, create new opportunities for members, and appeal to emerging markets. DEI efforts enable associations to be more competitive in delivering relevant resources for its members to help them serve the rapidly evolving consumer landscape and social climate.

Diversity

Diversity is the representation of differences across race, gender, religion, sexual orientation, ethnicity, nationality, socio-economic status, language, disability, age, and political perspectives.

Equity

Equity is the fairness within the procedures of governance, access to resources and opportunities provided by the association, and addressing the root causes of disparate outcomes.

Inclusion

Inclusion is ensuring that participants feel and are welcomed to the degree where they can fully participate in the decision-making and development opportunities with the association.

Why DEI?

Many successful organizations implement DEI initiatives as a source of competitive advantage. For others, it is a matter of justice and social responsibility. For all, it is essential to sustainable growth strategies and value creation. DEI measures can be examined internally and externally.

Internal

Decades of research on DEI shows an undeniable correlation between diversity of teams and level of performance, creativity, resiliency, and progress. Teams in this context, is used broadly to include internal association staff, volunteer committees, and the association's leadership. Prioritizing the diversity of your internal decision-makers and thought leaders will lead to more innovation and long-term member value.

External

Not only are REALTOR® members becoming more diverse, but so are their clients and the communities they serve. Organizations are realizing that consumer demand for corporate allyship is gaining momentum, and a lack of responsiveness can lead to the loss of relevance and competitiveness in the industry. Research also shows that millennials and Generation Zs place greater emphasis on societal issues and social justice. Millennials and Gen Zs have entered the real estate market and are anticipated to outpace their preceding generations in diversity and transaction potential. Members are already facing challenges of shifting consumer demands and emerging technologies that require them to adapt. Failing to enhance the REALTOR® brand among diverse consumers will directly affect members' future business opportunities. The same can be said for attracting new REALTOR® members and the next generation of association leadership. Associations that do not commit to DEI will find it difficult to recruit new members and face long-term sustainability challenges.

NAR's Diversity and Inclusion Commitment Statement

The National Association of REALTORS® represents more than 1.4 million REALTORS® in diverse communities across the country. NAR staff fosters a culture where diversity and inclusion are integrated into each of our five core values. Through inclusive collaboration and mutual respect for our colleagues, we focus on the principles that matter to the organization and drive how we engage each other to reach our common goals. We fully embrace perspectives from all walks of life—regardless of race, ethnicity, gender, religion, age, sexual orientation, gender identity, disability, national

origin, socioeconomic status, political affiliation or any other qualities by which we may define ourselves. We commit to bringing out the best in ourselves, uncovering our hidden talents, and celebrating differences in our day-to-day interactions. These beliefs are essential as we serve our members who help fulfill the dream of home and property ownership in America.

We need to better understand the backgrounds of our members and the markets they serve. We need to actively seek out members of marginalized groups and encourage them to get involved so that our boards of directors look like our general memberships. We need to train volunteer leaders and staff about the benefits of diverse perspectives. We need to engage with community leaders to advance housing opportunity. We need to raise awareness about fair housing among consumers, educate our members, and assist with reporting violations. All of these things should be core to operating a REALTOR® association.

How to Start: A Step-by-Step Guide to DEI

Diversity is the goal. Inclusion and equity are the tools needed to reach that goal.

Step 1: Inclusion

Conduct an internal audit of how the association is cultivating a culture of inclusion:

1. Are your events and communications representing diversity in thought, audiences, interests, and backgrounds?
2. Do your committee and leadership demographics reflect the market and your membership?

Example: Collin County's Census Outreach <https://www.ccar.net/census/>

The Collin County Association of REALTORS® took an active role in ensuring complete census counts in 2020. CCAR realized that the board's jurisdiction covered diverse populations and that expressing the importance of the census would need to have an inclusive reach. In response, CCAR mobilized its global and diversity committee members to produce videos promoting census participation in 26 different languages. Languages included Arabic, Chinese, Farsi, Portuguese, and American Sign Language.

Step 2: Equity

The audit in Step 1 may uncover processes and procedures that are not achieving diversity. Step 2 focuses on modifying those processes and procedures to create equitable outcomes.

1. If committee leadership is mostly homogeneous, is there unconscious bias behind the selection process? Are there changes to the selection process that would reduce bias?
2. If your events are attracting the same group of participants, are association activities presented and held in a manner that makes everyone feel welcomed to attend and participate?

Example: Austin's Diversity Report <http://www.abor.com/wp-content/uploads/2019/10/2019-Diversity-Report.pdf>

The Austin Board of REALTORS® reviewed its current membership composition, opportunities for leadership advancement, and historical demographics of past leadership and volunteer members. The 2019 findings revealed that the diversity of ABOR's Board of Directors for the past ten years is not reflective of its membership at large nor the greater Austin community. In response, ABOR outlined short-term and long-term strategies to increase diversity at the association, including annual DEI training for new and existing board members and encouraging staff certification in DEI.

Step 3: Diversity

Fix equity issues discovered in Step 2 and foster an environment of continued learning to maintain diversity in association practices and governance.

1. Are association staff and leadership knowledgeable enough on DEI topics to measure progress and set future benchmarks?
2. If you have a DEI member committee or advisory group, are those members supported in their efforts to make real change?

Example: McAllen's Formation of a Diversity and Inclusion Committee

The Greater McAllen Association of REALTORS® executive leadership recognized a need to better reflect the community that the association serves. Responding immediately, the Nominating Committee acted to reduce bias from its selection process. The Board of Directors further decided to create a Diversity and Inclusion Advisory Council to encourage more examination and safe discussions focused on DEI practices in association activities. The board also agreed to consider an amendment to the association bylaws, which would formally establish a Diversity and Inclusion Committee at GMAR.

Step 4: Repeat

Successful DEI initiatives are organization-wide and constantly reexamined. Competitive associations and leaders are dedicated to improving existing shortcomings and focusing future progress through a DEI lens. They act despite fears of getting it wrong, receiving negative member reactions, or having uncomfortable conversations. For more resources, visit texasrealestate.com/inclusion.

CHECKPOINT

Answer the following questions regarding the diversity, equity, and inclusion efforts of your local association:

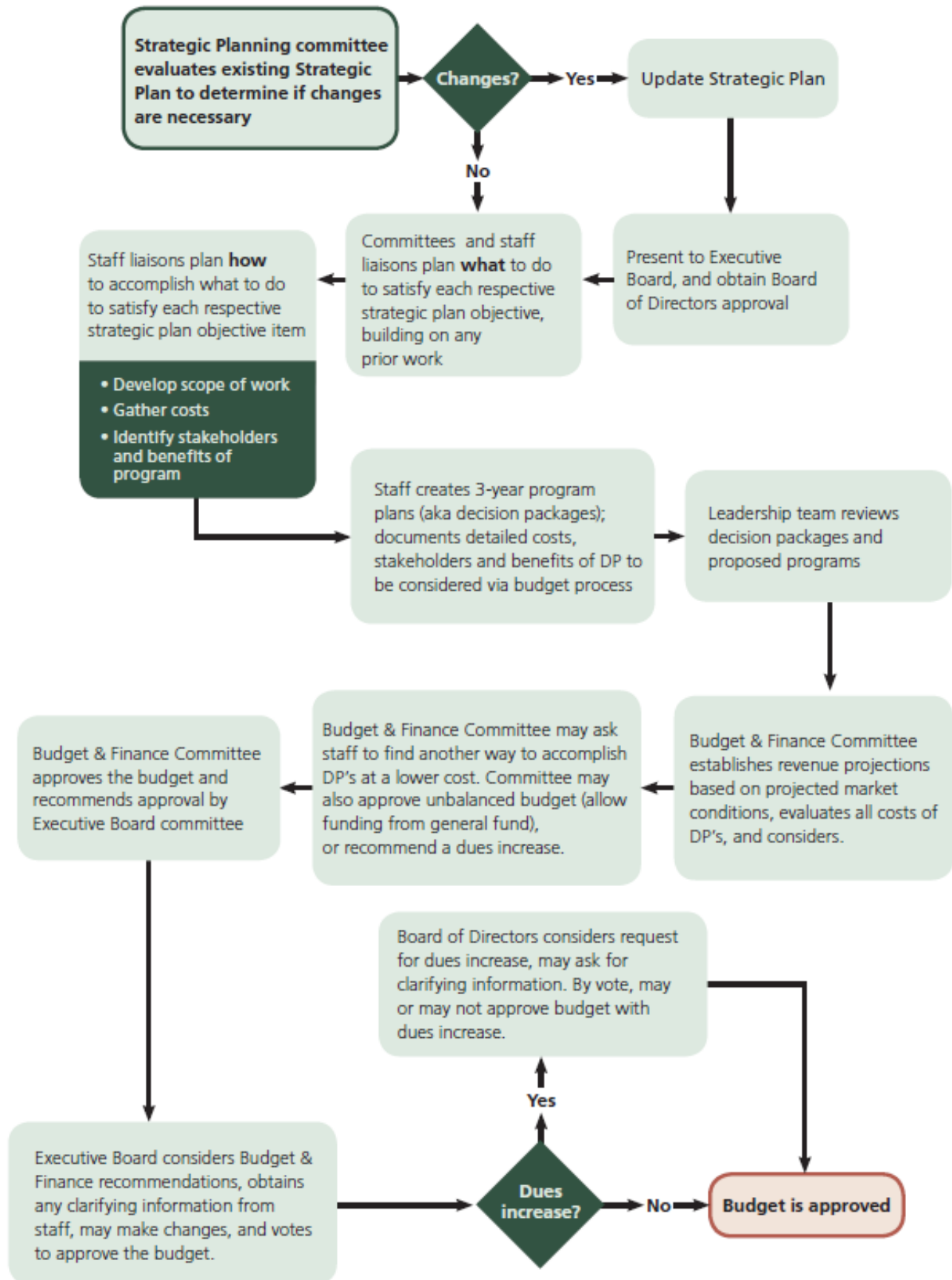
1. What has been done already? Can you find reports of actions taken to improve the diversity of your local board? If not, why do you think that is?

2. Why is it important for local board staff, volunteers, and leadership to reflect the communities they serve?

Leading through the Budget Process

Budget Process

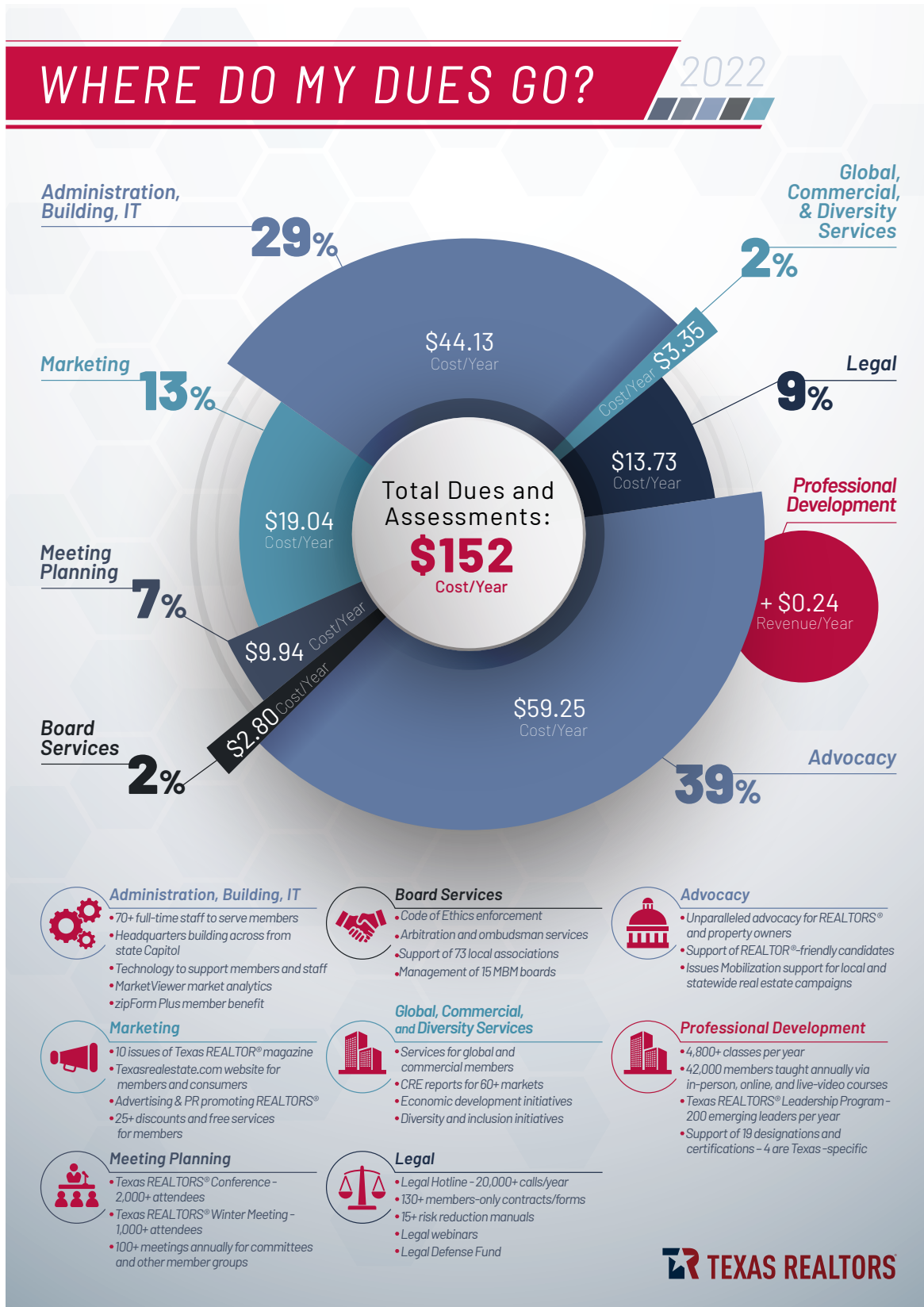
Budget process



Reading Non-Profit Financial Statements

If you are appointed to the Budget and Finance Committee for either the state or national association, you will attend an orientation to review the accounting methods, processes, and responsibilities you will have. There are resources available if you want to learn more.

<https://www.amazon.com/How-Read-Nonprofit-Financial-Statements/dp/111897669X>



Leading the Organization - Next Steps

Work on a leadership development plan to increase your skillset.

General

1. Earn your C2EX endorsement
2. Participate in the Texas REALTORS® Leadership Program.
3. Attend committee meetings at the state and national level where your interest lies.
4. Apply and work with a mentor on other skills you can hone to prepare you for your future committee and leadership opportunities.

Examples of Experience

Diversity or Housing Initiatives Committees

(the first three below are recommended for all national committees)

1. Attend the [At Home with Diversity](#) course. Course availability can be found on [TexasRealEstate.com](#)
2. View the National Association of REALTORS® [Fair Housing](#) video
3. Complete the [Fairhaven](#) exercise
4. Read [The Color of Law](#)

Global Committees

1. Earn your CIPS designation
2. Participate in the Texas REALTORS® annual cruise
3. Involvement in global real estate
4. Involvement in local global committees

Commercial Committees

1. Earn your TACS or CCIM designation
2. Continued involvement in commercial real estate
3. Involvement in local commercial committees

Professional Development Committees

1. Hold the GRI designation
2. Earn other designation or certifications
3. Demonstrated involvement in local professional development committees