

## Leadership Training Agenda

### Association Overview

- Company Structure, Governing Documents, Annual Budgets
- Tri-Level Assn Structure, Core Standards
- Authorities, Fiduciary Responsibility, Legal, Spokesperson, Signatory
- Liability Insurance: if acting within scope of authority / appropriately, Admin by NAR, All docs in place
- Anti-trust, Conflict of Interest, Roberts Rule of Order, Meeting Minutes
- Leadership Agreement
- How decisions are made
- Strategic Plan

### Working with Each Other: Effective Teams

- Traits of a Good Meeting Chair
- Traits of a Good Meeting Participant
- Working Effectively as a Team

### Working with the Staff: Proper Roles

- Difference between Leadership and Staff Roles
- What to Expect from Staff
- What Staff should expect from you

### Working with the Members: Key Outreach and Communication Tips

- Key Input and Feedback Tips
- Key Outreach and Communication Tips
- Challenging Questions



# Our Legal and Ethical Responsibilities

---

The Board and MLS succeed in maintaining order in the Berkshire real estate marketplace through our adoption and enforcement of policies. It is incredibly important that our policies be followed to protect a member's right to earn a living, be treated fairly, while upholding the code of ethics and ensuring consumer's right.

### Leadership Resources

- [Leadership Agreement](#)
- [Meeting Minute Archive](#)
- [Financial Archive](#)
- [Board Financial Responsibilities](#)
- [Anti-Trust Issues for Boards](#)
- [Board of Directors Fiduciary Duties](#)
- [Procedure Guide Manual](#)
- [Staff Interaction / Duties](#)
- [Robert's Rule Reference](#)

### Our Guiding Light

- [Strategic Plan](#)
- [NAR Core Standards](#)

### Policy Documents by title shown directly below.

- [BCBR Bylaws](#)
- [Code of Ethics](#)
- [Committee Guidelines](#)
- [Internet Policies](#)
- [MLS Bylaws](#)
- [MLS Policies](#)
- [MLS Rules and Regulations](#)
- [MLS Data Use](#)
- [Arbitration Guidelines](#)
- [Pathways to Professionalism](#)
- [Trademark Policies](#)
- [All Membership Forms](#)

All documents can be found at <http://berkshirerealtors.net/leadership/>

Any documents that are password protected can be accessed by: **Leadership2015**

## **Traits of A Good Meeting Chair**

### **STARTING OFF RIGHT**

- Have an Agenda
- Start on Schedule
- Review minutes of previous meeting

### **STAYING ON TRACK**

- Guide, mediate, probe, and stimulate discussion
- Watch out for visual as well as verbal cues to see how people are reacting.
- Periodically restate the issue and the goal of the discussion.
- Seek consensus, not necessarily unanimity.

### **FINISHING STRONG**

- When an action item is agreed to describe the follow through and who is responsible.
- End on schedule
- Close with a review of what has been accomplished.
- Set the date and time for the next meeting

### **A SPECIAL NOTE TO COMMITTEE CHAIRS:**

- Do self-introductions until everyone knows each other. Make a point of soliciting new members' opinions. Provide background information for new members so they don't feel uninformed.
- Give members something to do and decisions to make. No one likes to volunteer and then not be given anything to do or come to a meeting when all the decisions have been made.
- Provide recognition. Thank members with thank you notes, emails, publicly in front of the committee, asking the President and/or EVP to send a special note, or putting their photo and an article in the Newsletter.
- Follow up with action items immediately after the meeting – not the day before the next one!



## Traits of A Good Meeting Participant

---

### **BE PREPARED**

- Read Meeting Materials in Advance (it is not appropriate to open your materials when you sit at the meeting)
- Contact Staff or Leader with Questions
- Do follow up research on terms or issues you don't fully comprehend

### **STAYING ON TRACK**

- Avoid idle chatter or chit chat with those next to you. It distracts from the meeting to have separate conversations
- If a meeting goes into executive session, never discuss what transpired outside of the meeting room, not even with other attendees.
- Maintain confidentiality when required and seek clear understanding about how and when to share information discussed
- If a motion is passed, you should never disparage the outcome.
- Raise a point of order if you feel that meeting rules are being broken
- Seek always to do what's best for the most, not what's best for you or your office

### **RESPECT FOR OTHERS**

- Don't interrupt, but rather signal to the chair you wish to speak
- Do not repeat what others have stated unless the body is asked for consensus or you simply wish to say, "I agree".
- Be concise when you make your point so that others have an opportunity to speak.
- Try to make sure everyone has had a chance to speak before jumping in for a second turn
- Strive to move the discussion and decision forward when possible, seek consensus

### **FINISHING STRONG**

- Bring your calendar / phone and commit to the next meeting at the end.
- Make a list of those items you promised to do and add them to you calendar
- Make a note about what message you'd like to convey when speaking with the membership



### Traits of a High Performing Team

---

- They make the work **fun and satisfying** (truly accomplish something!)
- Teammates have developed a **trust** in each other and in the team's purpose -- they feel free to express feelings and ideas.
- Everybody understands and is working toward the **same goals**.
- Team members are **clear on how to work together** and how to accomplish tasks.
- Team members actively diffuse tension and friction in a **relaxed and informal atmosphere**.
- The team **engages in extensive discussion**, and everyone gets a chance to contribute -- even the introverts.
- Disagreement is **viewed as a good thing** and conflicts are managed.
- Criticism is constructive and is **oriented toward problem solving** and removing obstacles.
- The team makes decisions when there is **natural agreement** -- in the cases where agreement is elusive, a decision is made by the team lead or executive sponsor, after which little second-guessing occurs.
- Each team **member carries his or her own weight and respects** the team processes and other members.
- The leadership of the team shifts from time to time, as appropriate, to drive results.
- No individual members are more important than **the team**....



### Leadership and Staff Roles

---

**Staff should steer the ship (with hand fixed upon the tiller), while volunteer leaders set the course with POLICY and strategic (and NOT logistical) decisions.**

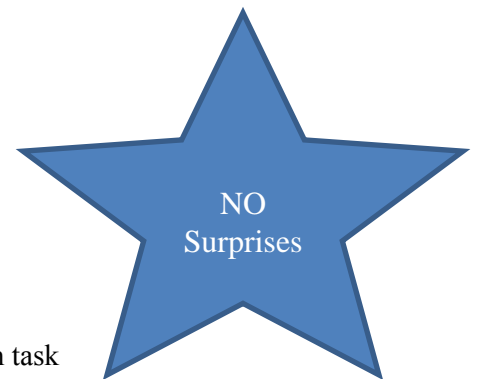
Board of Directors Role Basics	Staff Role Basics
<ul style="list-style-type: none"> <li>➤ Create and Adjust Governance Structures</li> <li>➤ Establish Job Descriptions for Board members, chairs and committees</li> <li>➤ Research Trends, demographics, and emerging issues</li> <li>➤ Be open and honest in all communications</li> <li>➤ Approve Strategic Plan and Set Goals</li> <li>➤ Call meetings when needed</li> </ul>	<ul style="list-style-type: none"> <li>➤ Educate on and follow Governance Structure</li> <li>➤ Establish Job Descriptions for Association Staff and work for hire orders</li> <li>➤ Inform leaders of Trends, demographics, and emerging issues</li> <li>➤ Be open and honest in all communications</li> <li>➤ Achieve Strategic Plan and Goals</li> <li>➤ Arrange meeting time, dates, locations, invitations</li> </ul>

#### AS STAFF, HERE'S WHAT WE EXPECT OF VOLUNTEERS:

- Show up on time and be ready
- Understand the limitations of staff time and association resources
- Willingness to listen to staff recommendations
- Ongoing evaluation about how things are going
- Good meeting/committee management
- Working knowledge of Association mission, vision, goals and budget
- True partnership, if not a growing friendship.

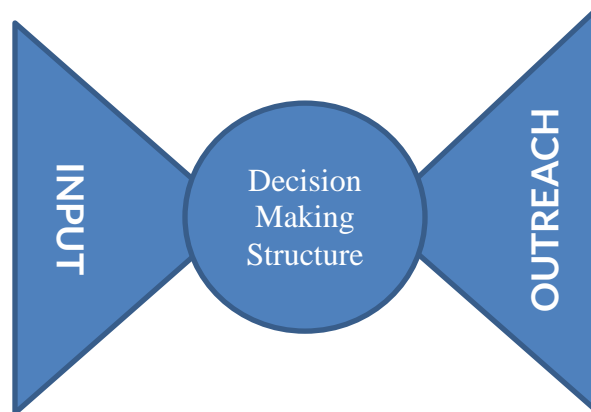
#### VOLUNTEERS SHOULD EXPECT FROM STAFF:

- Staff should provide history and background for your decisions
- Staff should have people knowledge...recommending who is best for a given task
- Staff sets up and arranges meeting dates, locations.
- Arrange electronic meeting attendance when requested
- Efficiency so we can act on decisions in a timely manner
- Warnings of any pitfalls, especially in legal areas
- Specialized help by managing logistics and implementing decisions
- Working knowledge of Association mission, vision, goals and budget
- True partnership, if not a growing friendship.



## Bow Tie Model

---



**Lots of input from members and from the community at one end. A very tight and efficient decision-making structure at the middle. And then lots of outreach and communication at the other end.**

### KEY INPUT TIPS

- Review of member survey results and feedback is critical
- Input from members should always be shared with staff / leadership (no surprises)
- Know where to get the answers, whether online or from CEO
- Make Yourself a Magnet for Members
- Share, share, share opportunities to get feedback: Network at meetings, add items into the Friday Recap soliciting feedback or input, attend events, etc...

*>> Working with your table or brainstorming alone, create your 20 Second Speech to explain the benefits of membership and involvement in organization.*

### KEY OUTREACH TIPS

- When you speak, you represent the whole membership
- Stay Positive, Promote Events and Services, Share New Things, Follow Up with Questions
- Identify those that might be good volunteers,
- Share the message of Involvement and support Meaningful efforts of the member to engage
- Staff is in charge of communications, so work on positioning and sharing the message, but don't create your own message... all leaders should speak in a unified voice about association matters.
- Press inquiries always go to staff: They will share with spokesperson President, or expert if a different field. They will also prepare statistics and talking points for anyone authorized to speak to press.
- Make Yourself a Magnet for Members





### Challenging Questions

So what do you plan to do about it?

*Why didn't you address this issue sooner?*

What do you think about these complaints I've been hearing?

Questions like these, whether from volunteer leaders, brokers, agents, vendors or team members, can easily throw us off guard. We stumble and stutter as we attempt to find the right answer. Sometimes we don't even know the right answer.

### Answering Challenging Questions

As leaders we have a responsibility to respond to questions in a thoughtful and accurate way. Successful communicators have learned that often the worst thing they can do is try to answer a question too soon. By answering right away, they run the risk of contradicting the person, sounding defensive or even answering the wrong question.

People rarely ask a question without a reason, so it's very helpful if you **understand why** they are asking their questions before answering. It may be that they disagree with a decision that was made, or they have a point to make of their own, or they simply don't understand something and need clarification.

No matter what the reason, you'll be better able to provide information and address their needs if you take a moment to **ask a few questions** of your own before launching into an explanation.

Successful communicators have learned to **get more information** and clarify their understanding before answering questions. In this way they ensure they are on the mark with their answers.



**Don't attend every argument  
you're invited to.**



## Working with The Members

### Answer with Impact

#### Answer with Impact

Here's an easy **3-step approach** you can use to ensure you answer with impact. It buys you time to think, shows respect to the person asking the questions and ensures that you fully understand what is being asked.

#### Show interest

##### Step One: Show interest

This puts you on the same side as the questioner rather than in an adversarial position. It also buys you time to gather your thoughts. Be sure to sound natural and unruffled. There are many ways you can do this. Here are some examples:

*That's a good question. (praise)*

*I can understand why you would have that concern. (empathize)*

*I agree that something needs to be done. (agree)*

#### Ask Questions

##### Step Two: Ask questions

The more you understand about the question the better you are able to address it. Use open questions that require more than a *yes* or *no* answer (that start with *who*, *what*, *where*, *when*, *why* and *how*). Here are some questions that get you important information:

*What specific information would you find helpful?*

*It sounds like you have some ideas about what should have been done. Would you share them with me?*

*Can you tell me more about your concerns?*

#### Provide Info

##### Step Three: Provide information

As soon as you have confirmed that you understand them, you're ready to share information in a non-defensive, helpful manner. Explain things in terms that are easy to understand and relate to what the person has said.

*Now that I understand your question better, let me tell you about our new policy on....*

*Thanks for clarifying what you're looking for. I'd be happy to tell you more about...*

*The clearer you are about my perspective, the more willing and able I am to be open to yours.*

*-- Barry Johnson*

### Challenging Questions / Real Life Volunteer Situations: Group Exercise

A member approaches you and tells you that 123 Main Street sold 2 months ago and was never reported in the MLS and no one has done anything about it.

>> *What do you say/do?*

You think the idea of a public facing website is bad for your business but see that it is a key element of the Strategic Plan. If a member asks you about it...

>> *What do you say/do?*

You're at a showing and the co-broke pulls you aside and shares an "in the field" story where they think the other agent was 'totally unethical, right?'

>> *What do you say/do?*

A reporter calls and asks why there are so many houses on the market that aren't selling.

>> *What do you say/do?*

You see that we have very healthy reserves and have always wondered if there is a plan to use it. A member approaches you and asks why we don't lower dues since we have so much money on hand.

>> *What do you say/do?*

A member calls and asks for a recap of what happened at the Board of Directors Meeting.

>> *What do you say/do?*

You hear through the grapevine that a bunch of offices are thinking of joining a neighboring MLS.

>> *What do you say/do?*

The members in your area keep asking for more meetings to be held there and ask if you'll call one for that region.

>> *What do you say/do?*

A member asks what the heck are we doing billing for political money.

>> *What do you say/do?*

Question of existing leaders... share what question or situation have you experience or been caught off guard by