

Leadership 300: Enhancing Leadership Skills

Pre-course Materials

In preparation for attending the upcoming session, you are asked to complete the following pre-course preparation. Your time spent completing this pre-course work will enable you to gain more from the activities and workshops you'll participate in.

1. Read the following materials which will be covered in the session:
 - What is Strategic Planning?
 - Advancing a Strategic Plan
 - Meeting Management
 - Responsibilities of the Chair
2. Review your organization's strategic plan if one exists. We will be discussing strategic planning in the session and it will be beneficial if you are familiar with your own plan.



A hard copy of the attached materials will be provided for you in the course, so you need not print them. You may choose instead to review them electronically. If you have any questions about the course, please contact the program coordinator.

Course Overview

This advanced course is for leaders of all kinds – individual leaders, committee members and association leaders. It is targeted to leaders who are interested in advancing their skills in chairing meetings and answering tough questions. Through group discussion and interactive activities, you will better understand the duties of a director, know how to advance the association strategic plan and learn to handle challenging meeting situations.

Objectives

By the end of this program, you will be able to:

1. Explain the duties that directors are expected to fulfill
2. Implement a strategic plan through actions and initiatives
3. Describe effective ways to plan and facilitate meetings
4. Fulfill the responsibilities of a meeting chairperson
5. Answer with impact when asked a challenging question
6. Assess your leadership skills

Version 3 May 9, 2016

What is Strategic Planning?

Strategic planning is the process of defining a strategy or direction, and making decisions on allocating resources to pursue this strategy. These are critical business functions of most leaders. It's important that you understand what strategic planning is and how it affects the decisions you make.

The Outcomes of Strategic Planning

For many associations, the outcomes of the strategic planning process include a mission, vision, values and strategic goals. Here are some examples that illustrate these important elements of strategic planning for associations and individuals.

Description	Examples
Mission	
The association's reason for being. It reflects the services delivered to meet the needs of the stakeholders. It is a concise statement that identifies the group, the people served and what is offered.	ABC REALTORS® advocates for REALTORS® and their clients and provides services to help members prosper
Vision	
What the association wishes to achieve in the future. It provides long-term direction to everyone involved. It often describes what the association will be or what it will accomplish.	ABC REALTORS® is the lead organization for all matters affecting real estate in the state, and a model for the rest of the country
Values	
The principles that are important to the association. These provide direction on how the association will act when delivering its services. These values will be consistent with the mission.	<ul style="list-style-type: none">• We are open minded• We are inclusive• We are collaborative• We are innovative and creative in the quest to reach our vision
Goals	

A set of goals based on the mission, vision and values. These goals guide decision making by individuals and groups. They help individuals and associations determine what actions to take, what resources are required and how to allocate funds (budget).

- Be visible and active in the community and be seen as an organization that cares about the community's quality of life (future, health, livability)
- Be seen by the public, media, and elected officials as the leading advocate for private property rights and real property ownership.
- Create an environment that respects and values all employees

Advancing a Strategic Plan

It is important to understand the difference between an "operational plan" and a "strategic plan".

The Strategic Plan

The strategic plan is about setting a direction for the association, devising goals and objectives and identifying a range of strategies to pursue so that the organisation might achieve its goals. The strategic plan is a general guide for the management of the association according to the priorities and goals of stakeholders. The strategic plan does not stipulate the day-to-day tasks and activities involved in running the association.

Because strategic planning is long term (3 to 5 years) it is important to establish what the association hopes to accomplish in each year. Where long-term planning is concerned, effort is most important. The question that leaders need to ask is:

What kind of time, resources and effort are going into each of the major strategic goals?

Operational/Business Plans

The Operational Plan presents highly detailed information specifically to direct people to perform the day-to-day tasks required in the running the association. Association management and staff should frequently refer to the operational plan in carrying out their everyday work. The Operational Plan provides the what, who, when and how much:

WHAT: the strategies and tasks that must be undertaken

WHO: the persons who have responsibility of each of the strategies/tasks

WHEN: the timelines in which strategies/tasks must be completed

HOW MUCH: the amount of financial resources provided to complete each strategy/task

HOW TO MEASURE: identification of the metrics that will measure performance outcomes

Most of the worthwhile things that have maximum benefit for an association take years to accomplish. Some association leaders may not even be leaders when their major goals are accomplished; however, they will know that they were part of achieving a very important objective that was worthwhile and benefited the association.



*Most of the things that
are worth accomplishing
would be declared
impossible before they
were started.*

- Louis Brandeis



NATIONAL
ASSOCIATION of
REALTORS®



Pre-course Materials, REALTOR® Leadership Program
Leadership 300: Enhancing Leadership Skills
All rights reserved. © 2007-2016 Ontario Real Estate Association

Meeting Management

Running effective meetings is a skill set that is necessary for association leaders. That's because meetings provide invaluable face-to-face venues for volunteer leadership, members and staffers to discuss current issues, make strategic decisions, build professional skills and forge business and personal relationships. But learning to run effective meetings doesn't happen overnight. There is no substitute for training, education and experience for developing a strong set of skills. In general, those skills revolve around facilitating the discussion, keeping the session on track and providing follow-up reporting as needed.

Planning

Agenda Construction

The content for the agenda is the responsibility of the staff and comes from work stemming from previous meeting minutes, task force reports or committee recommendations. Most often the agenda is sent to the chair for review and comment. The chair should be aware of all aspects of the agenda, who will be presenting reports, any special guests or presenters and the issues that will be discussed and decided at the meeting. It is helpful to include the association's strategic plan, mission and vision, as outlined in the agenda to ensure it is top of mind for all members.

Agenda Distribution

The agenda is distributed to the attendees in advance of the meeting to permit them to prepare for the meeting. Only in an emergency may the agenda be distributed at the beginning of the meeting.

Agenda Amendment

It should be reasonably difficult for an attendee to add an item to the agenda, especially if it is of large importance. The association should have a principle of **no surprises** that is stated in the meeting rules¹.

Facilitating the Meeting

Facilitating a meeting, and keeping the discussion under control, is the responsibility of the meeting chair. The chair should be an enlightened leader who gives direction for the attendees, who may from time to time question the process. This can be a balancing act, but if the attendees and the chair act in good faith and for the betterment of the association, it can be accomplished.

Minutes

Minutes should be distributed to the attendees according to policy.

Planning a meeting means that all aspects of the meeting are well in place prior to the meeting.

¹ Meeting rules means those rules the group establishes to plan, direct and control their own meetings. For example, the meeting rules could contain the rules to permit late agenda items, or perhaps timelines when the minutes are to be distributed, who signs the minutes, etc. The meeting rules should be between half a page and two pages. A similar concept should be applied to committees (committee meeting rules).

Responsibilities of the Chair

Some of the responsibilities of the chair in a meeting include:

1. Maintain order and decorum (i.e. courtesy and respect) regarding the remarks of attendees and their actions. Any remark or action which might cause friction or disorder must immediately be dealt with by the chair. Firm, but polite intervention is in order
2. Protect the rights of each attendee to speak, make motions, advocate a position, and to vote
3. Run an efficient meeting and to prevent the meeting from being bogged down.
4. Ensure that debate is relevant to the motion or subject
5. Remain neutral, impartial and fair
6. Know the rules of order and to ensure they are followed
7. Call the meeting to order at the time set for the meeting
8. Announce each agenda item and to state the motion clearly and unambiguously
9. Recognize attendees to speak – all remarks are to be made through the chair and must be impersonal. If possible, debate should alternate between those advocating the motion and those against the motion
10. Take the vote and to announce the action to be taken, if any
11. Rule on any point of order or point of personal privilege
12. State the motion frequently or summarize, if the debate is to be long
13. Be pleasant, patient and helpful – the chair is the servant of the meeting
14. Only vote, if you have a vote, if it will make a difference
15. Facilitate participation of all attendees

