

CASE STUDY #1 The Merger

Mary was enjoying her new her position as the CEO of a 3,000 member REALTOR Association.

Before joining the City Side Association of REALTORS Mary was the Executive Director of the Suburban Area Association of REALTORS for 10 years. When Mary learned of the opportunity to advance her career and become the CEO of a much larger association with substantial resources she jumped on it.

Now eight months into the new position Mary is worried. She sold her home, moved into a large townhouse with her three school age children and became obligated for a mortgage that she barely qualified for.

She is worried because she just left a regional meeting where brokers and MLS Executives were discussing the idea of merging four small MLSs into one large regional one. 60% of the income funding the City Side Association of REALTORS comes from their MLS.

The proposal being suggested by the brokers is to consolidate the database, lower fees, reduce redundancy and enhance services. There was even a suggestion that the four local associations should merge into one.

All Mary could think about after the meeting was her job. She thought about her mortgage, moving her children to another school if she was forced to move again and what she perceived to be the humiliation of losing her title as CEO.

The leadership of the City Side Association of REALTORS was quite enthusiastic about the discussions and even agreed to host the next meeting. The President asked Mary to identify professional consultants the group could consider to help with the discussions and what next steps to follow.

As the newest CEO among the four associations in discussion, Mary is fearful she would not be seriously considered as the CEO of the new entity if a merger took place.

QUESTIONS

What would you advise to Mary do?

Have you ever witnessed a scenario like this and if so, how did the CEO react?

CASE STUDY #2 Support Staff issues

Andrew is the CEO of a medium size association of REALTORS. He has a staff of five employees, four of whom have been with the association longer than Andrew.

Two of the support staff has been with the association over 15 years and they do not hesitate to remind Andrew of this. Andrew is frustrated with them. He finds their attitude toward their job and members not what he wants or expects.

Andrew has spoken to them about the value of smiling more, being less bureaucratic and not gossiping about members or each other in the office. They look at him like he's crazy.

Both employees know their jobs inside and out and do not want to change anything. They resist Andrew's suggestions that could increase efficiency and breathe new life into stale programs. The bottom line is these veteran employees; both over the age of 50, do their job as outlined in their job descriptions.

Andrew has heard members and leadership complain that some of the staff is unfriendly, ridged and appear to have an "attitude" about them.

Questions

What should Andrew do?

What strategies can Andrew employ to correct the situation?

What tools are available through NAR that could help Andrew with this problem?

CASE STUDY #3 We need more money!

Ryan is the CEO of a medium size local association with big financial problems. The Association has been running deficit budgets for the last three years in spite of membership growth and a stable real estate market.

The year-end deficits are being funded from reserves. The association realized a sizable profit after the sale of a piece of land they owned next to their current building. Ryan calculates that if the Board of Directors continues to spend money at its current rate and does not increase dues, fees or non-dues income they will run out of reserves in 12 to 18 months.

The chief cause of the budget over runs are unrealistic budgeting, excessive spending on social events and the installation, travel to real estate related meetings and seminars outside the REALTOR family by the leadership and lavish spending on food and beverages with the Associations credit cards.

Questions

How would you advise Ryan?

Who can he turn to for assistance?

Is this really his problem?

What would you do?

CASE STUDY #4 The Top Producing PRESIDENT

Maria has been the CEO of a medium size association for the past 15 years. She knows her job, gets great evaluations, the members and staff like her and she is fairly compensated.

Maria is ready to quit her job.

She knows her incoming President Vanessa, a top producing agent, has a reputation as a “bully” and is a relentless task master. Maria has seen Vanessa in action over the years and is dreading the day she becomes President. She moves and acts quickly, is always on her phone or running out the door.

Maria has tried to discuss her concerns with incoming leadership but they are afraid to offend her. No one wants to upset Vanessa; she does a ton of business, her broker protects, her clients love her and the media respects her.

The major concerns of Maria are that Vanessa:

- will bully her into doing whatever she wants

- will insult or direct her staff

- will not give the association her full attention due to her busy work schedule

- want to scrap or revamp current programs and services

QUESTIONS

Should Maria start looking for a new job?

Can anything positive come from this relationship?

What strategies should Maria use in working with Vanessa?

Is it better to have a President who does little business but has lots of time for the Association or one like Vanessa?

