

# 2025 REALTORS® ASSOCIATION MODELS PLANNING TOOL: PROGRESSION CHART

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The **Association Model Progression Chart** shows how associations can grow from Administrative to Management to Leadership across four key areas:

- Governance and Operations
- Staff
- Member Services
- Internal and External Relations

Each category offers simple steps to help your association strengthen operations, improve services, and plan for the future.

## HOW TO USE IT

1. **Find your starting point:** Use your Models Assessment results or review where your association fits today.
2. **Choose what to improve:** Read the chart to see practical ways to move to the next level.
3. **Use it in planning:** Apply the chart during board retreats, strategic planning, or staff development.
4. **Take small steps:** Focus on a few areas at a time. Progress is flexible and based on your association's goals and capacity.

## DISCLAIMER

This assessment is a planning aid designed to guide the delivery of services, programs, and member value. It should be used as one of several tools to inform expectations and responsibilities for association staff and volunteers. Final decisions should incorporate board input, market context, and strategic priorities.

# I. GOVERNANCE, PLANNING, AND ORGANIZATIONAL OPERATIONS

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
<b>STRATEGIC VISION AND GOALS</b>	Bring staff and board together annually to review your mission and set shared goals. Create space for joint input and shared ownership of strategic direction.	Take it a step further by involving staff in scanning the horizon—encourage them to bring forward trends, data, and insights that help shape your long-term vision. Staff become a key driver in future planning.
<b>DECISION-MAKING AUTHORITY</b>	Clarify what decisions staff can make independently. Document this in a board policy manual and walk through examples in training.	Build a culture of shared governance where the board sets direction and staff lead execution. The AE becomes a partner in strategy, not just operations.
<b>COMMITTEE STRUCTURE</b>	Align committees to strategic priorities. Assign knowledgeable staff liaisons to ensure consistency, follow-through, and support.	Reevaluate committee structures annually. Shift toward staff-guided committees with flexible scopes that evolve as goals change.
<b>GOVERNING DOCUMENTS</b>	Make sure your policies reflect current staff roles and authority. Include job descriptions and clarify boundaries in your internal governance materials.	Build layered, adaptable documents (bylaws, policies, SOPs) that empower nimble response. Use these tools as strategic guides, not just compliance checklists.
<b>STRATEGIC PLAN AND BUDGET</b>	Link each budget item to a specific strategic goal or member priority. Use a template that makes this connection explicit for the board.	Create a shared calendar that integrates budgeting, planning, and reporting. Use dashboards to monitor KPIs and course-correct during the year.
<b>FACILITIES &amp; EQUIPMENT</b>	Upgrade technology where possible and consider securing space that can serve as a permanent home for meetings or training.	Envision your space as more than an office—create a hub that members see as a resource for learning, networking, and business growth. Include hybrid tech and flexible setups.
<b>TECHNOLOGY STRATEGY</b>	Shift from vendor-only support to a hybrid model—staff can manage basic systems while vendors assist with complex needs.	Build internal tech leadership. Develop platforms that serve members directly (like custom learning portals), and integrate technology planning into your annual strategy.
<b>NON-DUES REVENUE</b>	Start with a pilot—maybe a co-hosted training or new sponsorship opportunity. Build internal comfort and explore scalable ideas.	Create a formal strategy for non-dues income. This could include launching a subsidiary, building investment reserves, or exploring licensing and partnerships.
<b>DISASTER &amp; CRISIS PLANNING</b>	Draft an internal crisis plan and walk through it with your staff. Include basic communication scripts, contact trees, and procedures.	Elevate your preparedness with a public-facing response plan. Partner with community organizations and fund a charitable or rapid-response mechanism.

## II. STAFF COMPETENCIES

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
STAFF STRUCTURE	Bring on staff support—either through part-time hires or outsourced services— to ease the burden on the AE.	Build a leadership team with clear departmental responsibilities. Align job roles with strategic priorities like communications, operations, or outreach.
COMPENSATION & BENEFITS	Offer salaries and benefits that reflect your region. If you can't yet offer full health, consider perks like flex time, stipends, or mental health days.	Develop a competitive salary structure with professional incentives—like bonuses for certifications or leadership training.
STAFF DEVELOPMENT	Allocate funds for the AE and one other staff member to attend a conference or course each year. Tie it to personal development goals.	Encourage a culture of continuous learning by creating annual development plans for all staff and budgeting for formal certifications.
CHIEF STAFF EXECUTIVE ROLE	Ensure the AE is at the table for planning and strategy conversations. Provide space for their input and empower them to lead implementation.	Elevate the AE to be the organization's ambassador—representing the association with external partners, community leaders, and policymakers.
HR PRACTICES	Write job descriptions, create a staff org chart, and compile policies in a simple handbook. Make sure it's shared and understood.	Invest in HR infrastructure—either software or a part-time HR lead. Create a formal onboarding process with checklists, welcome kits, and scheduled check-ins.

### III. MEMBER SERVICES

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
<b>MEMBER COMMUNICATIONS</b>	Develop a schedule for emails, newsletters, and social posts. Use consistent branding and messaging.	Build a communications strategy informed by analytics. Track what messages resonate and evolve your content accordingly.
<b>RECRUITMENT &amp; ORIENTATION</b>	Offer a combined digital and in-person orientation. Staff can take the lead in executing, with volunteers offering personal welcomes.	Use targeted messaging and segmented strategies—new agents, brokers, commercial specialists. Highlight value propositions based on audience needs.
<b>PROFESSIONAL STANDARDS</b>	Certify a staff member to handle complaints and manage cases. Ensure regular fair housing and ethics courses are offered.	Position the association as a regional leader, offering ombudsman and citation services, and training neighboring associations.
<b>EDUCATION &amp; TRAINING</b>	Host CE classes and hot-topic panels based on member interest surveys. Offer varied formats and affordable pricing.	Develop your own branded content such as webinars, videos, or mini-courses that reflect your members' local needs.
<b>BUSINESS TOOLS</b>	Start by subsidizing or promoting a few widely used tools. Highlight the member savings and ease of use.	Use member research to guide tool development. Partner with vendors or build in-house tools to meet niche needs.
<b>INDUSTRY TRENDS</b>	Schedule regular internal discussions on industry updates. Include input from NAR, state, and local trends.	Create trend briefs or forecasts and share with brokers and boards. Use the data to inform programs or pivot quickly.
<b>NETWORKING &amp; EVENTS</b>	Schedule monthly or quarterly events such as mix socials, trainings, and recognition. Involve both volunteers and staff.	Design events with purpose—leadership development, business planning, or community visibility. Consider awards, media coverage, or themed series.
<b>BUSINESS SPECIALTIES</b>	Support member-led groups for areas like commercial or property management. Host occasional meetups or training.	Launch formal councils with budget, staff support, and strategic plans for outreach, advocacy, and education.

## IV. INTERNAL AND EXTERNAL RELATIONS

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
STAFF LEADERSHIP	Add team leads or mid-level managers. Hold structured team meetings to align and problem-solve.	Create a leadership structure that includes succession planning, cross-training, and shared decision-making.
VOLUNTEER RELATIONS	Partner with current leaders to identify and mentor future ones. Start an informal leadership pipeline.	Formalize the pathway with a leadership academy, structured onboarding, and year-round cultivation.
PROFESSIONAL SERVICES	Build regular relationships with a CPA and attorney who understand your operations. Have them report to the AE.	Use strategic MOUs with consultants and advisors. Let staff leads manage their scopes and evaluate outcomes.
SOCIAL MEDIA	Build a content calendar and use simple tools to schedule posts and monitor engagement.	Use analytics and media strategies to launch awareness campaigns. Elevate your online presence as a voice in housing and local economic conversations.
COMMUNITY ENGAGEMENT	Check in regularly with civic leaders, brokers, and other organizations. Send quarterly updates or host listening sessions.	Lead community coalitions, offer local housing data, and position the association as a trusted source in policy or planning.
PUBLIC POLICY ENGAGEMENT	Regularly inform members on key issues and mobilize them for Calls to Action.	Frame issues proactively, launch campaigns, and create opportunities for members to testify or engage.
POLITICAL ACTION (RPAC)	Regularly inform members on key issues and mobilize them for Calls to Action.	Set strategic fundraising goals, host candidate interviews, and hold annual PAC-focused events.
GOVERNMENT ADVOCACY	Partner with allied organizations for joint statements or campaigns. Identify key contact volunteers for government relationships.	Lead local coalitions on zoning, housing, or tax policy. Present unified agendas and conduct legislative visits.

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