2017 IAE Work Group Report - Executive Summary

The purpose of the IREM® Association Executive (IAE) Work Group is to strengthen the partnership, and enhance the synergies, amongst IREM® staff – nationally and locally – and to develop ways to better serve our members through IREM® chapters.

The 2017 Work Group focused on several specific objectives:

- Discussion on course delivery enhancements
- Brainstorming Government Affairs initiatives and outreach
- Exploring the future of chapter awards
- Diving in to membership and marketing hot topics
- Enhancing professional development for IAEs and chapter leaders
- Simplifying the survey and analyzing the content of the Chapter Operations Report

The Work Group gave specific recommendations to enhance chapter services and support:

**Course Administration and Delivery:**

- To help alleviate confusion, send photos of course materials by course at the beginning of the year so IAEs know what they should be receiving
- Consider adding January and February courses to the website sooner
- Review the data on how the early registration rate is helping or hurting chapters’ classroom courses

**Government Affairs:**

- Provide more training on the difference between state and federal outreach for chapters
- Provide more training for chapters on how to be successful in advocacy outreach efforts
- Add membership type to Government Affairs Media Clip links

**Future of Chapter Awards:**

- Plan a substantial 30 minute awards celebration during Chapter Leadership Forum
- Strongly promote the chapter awards celebration to chapter leaders
- Find alternative trophies, plaques and certificates that are more budget friendly, but still formal
- Create additional recognition items for award winners
- Work with the IREM® Foundation to determine the appropriate shift in the IREM® Foundation awards
- Create valuable educational content based on winners’ programs and efforts

**Marketing and Membership Hot Topics:**

- When a member changes their address online, give them a dropdown to select their chapter of choice
- Send the IAEs a monthly schedule of promotional e-mails so that chapters are not sending similar communications on the same day or during the same week
- Ensure that IAEs are receiving copies of all e-mails
- Indicate which students took online courses on the Chapter Marketing Report
- Communicate with chapters on the rebranding project and to hold off on mass ordering anything with the IREM® logo
Chapter Operations Report Review:
- Formally change the name of the “Chapter Administration Profile” to “IREM® Association Executive Job Analysis”
- Send all communication regarding the input requests to both IAEs and Chapter Presidents and include a PDF of the questions
- Include the report data in Excel with the final report
- Simplify the questions on the survey to ask more direct questions that are easier for chapters to answer

IAE and Chapter Leader Professional Development:
- Finalize, develop, and deliver the chapter learning during the 2017 IREM® Global Summit and IAE Symposium
- Continue to provide education and opportunities for strengthening the relationship between IAEs and chapter leaders
- Review the list of professional development action items and wish list items from previous meetings and conferences to determine the best format for facilitating discussion and delivering customized education

Miscellaneous Action Items:
- Foster more collaboration amongst regions
- Review the frequency of communications sent by IREM® Headquarters’ staff and try to condense the amount
- Provide more web training – at beginning and advanced levels – for those chapters that have recently converted their web platform to StarChapter

For the full Work Group report, please visit www.irem.org/iaeworkgroupreport
IREM® Association Executive Work Group Report
IREM® Headquarters, Chicago, IL
February 16-17, 2017

Participating IREM® Association Executives
Susan Wagner – St. Louis Chapter
Julia Freeland – Sacramento Valley & San Francisco Bay Area Chapters
Jo D. Miller – Houston Chapter
Karen Cuttle – Greater Rhode Island Chapter
Kelley Hannon – Boston Metropolitan & Connecticut Chapters *(unable to attend)*

Participating IREM® Headquarters Staff
Jennifer Schlueter, Director, Chapter Services
Elise Fette, Chapter Services Liaison
Phyllis Coneset, CMP, Vice President, Leadership Services
Lynn Disbrow, CAE, Interim CEO/Chief Operating Officer
Nancye Kirk, Chief Strategy Officer/Vice President, Global Services
Josie Hernandez, Instructor-Trainer Program Manager
Diane Cole, Education Services Coordinator
Shelly Encher, Director, Customer and Member Services
Matthew Lesh, Director, Marketing
Beth Wanless, Senior Manager, Government Affairs
Andrew Lomo, Government Affairs Coordinator
Ron Gjerde, Vice President, Government Affairs and Content Services
Chris Migala, Vice President, Finance

Background
The purpose of the IREM® Association Executive (IAE) Work Group is to strengthen the partnership, and enhance the synergies, amongst IREM® staff – nationally and locally – and to develop ways to better serve our members through IREM® chapters.

The 2017 Work Group focused on several specific objectives:
- Discussing course delivery enhancements
- Brainstorming Government Affairs initiatives and outreach
- Exploring the future of chapter awards
- Diving into membership and marketing hot topics
- Enhancing professional development for IAEs and chapter leaders
- Simplifying the survey and analyzing the content of the Chapter Operations Report
- Building successful chapters and elevating chapters’ programs
Course Administration and Delivery:
The Work Group dialogued with key staff members on course sponsorship administration. With some recent staff changes, it seemed like a good time to check in on all aspects of course administration.

The IAEs were asked to make a list of all things that are working above and beyond. They included:
- Central registration process
- Prepared instructors
- Bite size information/communications on course sponsorship vs. the previous education binder
- Content of IREM® courses is so well respected in the industry
- Course sponsorship resources on www.irem.org including the marketing templates
- Responsiveness of IREM® Headquarters’ staff
- Reminder e-mails on course materials and reliable delivery of course materials

Then, a list of what needed improvements or consideration for changes, such as:
- Not enough local instructors
- New textbooks aren’t chapters’ favorites
- January courses are added to the website too late which could affect registration numbers
- Early registration – is it working?
- Some chapters perceive the online courses as competing with classroom courses and that discounts for online courses potentially undermine classroom course attendance and chapter profits

Josie Hernandez met with the IAEs to give them some insight on the Instructor Recruitment Campaign in support of the ARM® Track that will be taking place this year. IREM® will be accepting applications to become an IREM® instructor starting in mid-March. The deadline to submit an application will be May 1, 2017.

The primary focus of the recruitment campaign is to find new RES201 instructors in the following markets: Chicago, Denver, Indianapolis, New York, Seattle, Wichita, and Washington DC. These markets have been chosen because they have a need for an RES201 instructor or additional RES201 instructors, and because they have consistently sponsored the ARM® Track.

It was also shared that IREM® will be accepting applications from all markets for all credentialing courses, but preference will be given to those interested in teaching RES201 in those specific key markets already identified.

IREM® is preparing itself to position the ARM® Track to be used as a pathway to engage millennials and others entering the property management market. The current boom in the multifamily market provides a base of potential ARM® Members. The RES201 course content will be updated this year and scheduled to debut in 2018. The goal is to have a pool of instructors ready to deliver the track in key markets with potential candidates.

There was also a discussion concerning sponsorship of the ARM® Track bringing to light challenges and opportunities. Some suggestions made by both IAEs and IREM® Headquarters staff were:
• Spreading out the delivery of the ARM® Track between weeks or weekend offerings (every Saturday or 2 nights per week until completed)
• Sponsor a private offering: partner with a local multifamily property management company to deliver a class for their employees where they have the opportunity to obtain the ARM® credential.
• Split the delivery of the track between 2 local instructors if instructor availability is an issue.
• If IREM® members are also members of a competing Apartment Association, build a coalition between the 2 organizations to sponsor the ARM® Track.

Course Administration Action Items:
• To help alleviate confusion, send photos of course materials by course at the beginning of the year so IAEs know what they should be receiving
• Consider adding January and February courses to the website sooner
• Review the data on how the early registration rate is helping or hurting chapters’ classroom courses

Government Affairs:
IREM® Government Affairs staff met briefly with the IAE Work Group to learn how to better engage chapters when it comes to advocacy. When asked about the IREM® In-District Visits, most of the IAEs shared their confusion. The IAEs shared that they feel this is a great program, but chapters are unsure on how to get started. It was recommended that IREM® provide step-by-step details on how to execute it and give various examples of what success looks like during the Regional Meetings.

They also shared the need to make the language more common and less daunting on the website. They suggested even something as simple as changing the word “lobby” to “contact your representative”.

Government Affairs Action Items:
• Provide more training on the difference between state and federal outreach for chapters
• Provide more training for chapters on how to be successful in advocacy outreach efforts
• Add membership type to Government Affairs Media Clip links

Future of Chapter Awards:
In 2016, the following awards were given out at the IREM® Awards during the Leadership and Legislative Summit (LLS):
• IREM® Foundation Awards
• Income/Expense Analysis® Awards
• Membership Growth Awards
• Innovation Awards

Due to IREM’s strategic change from hosting LLS and instead hosting five Regional Meetings, the celebration historically held during the spring needed to be moved. A celebration of this caliber must be held at an event in which all chapter leaders are expected to attend. The time determined that would be the most effective is the Chapter Leadership Forum during the IREM® Global Summit in Chicago, IL in October 2017. The IAEs recommended holding the awards celebration during the last 30 minutes of the Forum so that chapters can leave on a high note. To this effect, the IAEs suggested having table signage for regions and/or chapters to sit together, pass out pom-poms to attendees to cheer with and to end
the event with a group toast. The IAEs think that IREM should promote the awards celebration early and often to get a buzz going and create excitement.

While not all chapters find a physical trophy, plaque or certificate the most valuable part of receiving an award, the IAEs felt that we should continue to give out something physical to keep the celebration formal, but that the physical item does not need to be as expensive as in the past. Since the celebration will only be 30 minutes, we will need to streamline the awards announcements. Other ideas for recognition were:

- Creating a “Winner’s Circle” that has IREM® branding or signage with the name of the award so that chapters can use the photo taken with IREM® senior leaders to promote their win. Photos can be taken after the event as there is a break and the Regional Forums afterward which will allow time for them.
- Feature the winners in JPM®
- Feature the winners in a Friday Feature
- Receive a credit to the IREM® Team Store so that chapters can select branded items
- Receive a branded pop-up banner to use at chapter events
- Have IREM’s marketing team create an image featuring the chapter and the award they won for use on social media and emails

The same award categories will be given out in 2017 and the following notations were made:

- IREM® Foundation Awards – The awards that the IREM® Foundation has given out in the past are primarily based on individual donations. The IREM® Foundation announced the Annual Chapter Giving Program in February 2017. As a result the Foundation Board of Directors will discuss shifting the awards to focus on the new program and, in turn, be more chapter focused.
- Income/Expense Analysis® Awards – In 2017, IREM® will present the 2016 winners with their plaques as well as announce the 2017 winners. No change in the criteria that the award winners are determined with is planned.
- Membership Growth Awards – To make the awards timelier, the growth will be based on membership growth from January 2016 – June 2017.
- Innovation Awards – In order to broaden the timeframe and allow for more submittals, chapters will be allowed to submit forms for programs or initiatives done any time from January 2016 – June 2017.

The last topic concerning chapter awards is how chapters can benefit and learn from the winners. The IAEs suggested that they would like to learn how chapters promote the IREM® Foundation; how the winners of the “Most Improved Chapter” in the Income/Expense Analysis® categories were so successful; how the 1st place winner in the Associate Membership Growth category grew their membership and would also like to see another chapter learning session at an upcoming conference featuring the Innovation Award winners. A concern about the Innovation Awards is that they are going to be announced in October which is when the session usually took place. Holding the session at an event the following spring is not timely as chapters consider the winners’ programs during their strategic planning for the upcoming year.

Future of Chapter Awards Action Items:

- Plan a substantial 30 minute awards celebration during Chapter Leadership Forum
- Strongly promote the chapter awards celebration to chapter leaders
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• Work with the IREM® Foundation to determine the appropriate shift in the IREM® Foundation awards
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Marketing and Membership Hot Topics:
IREM® chapters play a significant role in the growth of IREM®. Through sponsorship of courses, recruitment of new members, and local programs and events, chapters are the first contact for most customers and new members. Knowing that, the IAE Work Group is a great opportunity to check in on key programs and initiatives to attract and retain members.

First up on the agenda, the CPM® Sponsor Program that was launched at the 2015 IREM® Fall Leadership Conference. This program was created to help grow CPM® Members. By the end of 2016, 245 CPM® Members agreed to sponsor 378 potential CPM® Candidates resulting in 206 new CPM® Candidates and 5 new CPM® Members.

The IAEs agreed that this is a great program to gain new members and motivate CPM® Members to mentor CPM® Candidates, however, there is need to have more buzz created and awareness overall. The IAEs encouraged IREM® to create an incentive or award for chapters to help get more involved in promoting the program. They recommended reaching out to those CPM® Members that are not participating and asking them what would entice them to go out and recruit a new CPM® Candidate. The IAEs also thought that the word “sponsor” might make CPMs think that there is a lot more work behind it.

Next up, the Chapter Marketing Report. This report is a real-time, downloadable listing of members and nonmembers to assist chapters in creating customized, targeted promotions for courses and recruitment. As the IAEs reviewed the report, they agreed that this is still a useful tool and the targeted messages are still being used. They added a suggestion of differentiating those students and members that took online course vs. classroom courses.

The IAEs did express some concerns on the ability to easily find information on the website. And that IREM® needs to do a better job overall in breaking down the “IREM® Speak.” In other words, “tracks” and “courses” are not common terms for students.

Moving on to the Chapter Dues Program – an optional program which IREM® Headquarters invoices members for both their national and chapter dues. Shelly Encher reported that 67 of the 80 US chapters participated in the chapter dues program in 2017 and gave an update on what is included in the program and key dates.

Four of the IAEs on the Work Group are participating in the program and have been very pleased overall. Members thank them for the single invoice and are happy that IREM® Headquarters is also collecting Institute Affiliate dues on behalf of NAR again. The IAEs were also pleased with the amount of time it takes to receive their funds via ACH transfer and the lack of phone calls they are receiving from confused members.

Matthew Lesh then reviewed the rebranding project that IREM® is embarking on. Matthew shared that IREM® is in the process of interviewing a branding company to review our brand and determine how we can appeal to the next generation. It is unsure what might come from this, but all of the IAEs shared their excitement on what the future might hold for the IREM® brand.
**Marketing and Membership Action Items:**
- When a member changes their address online, give them a dropdown to select their chapter of choice
- Send the IAEs a monthly schedule of promotional e-mails so that chapters are not sending similar communications on the same day or during the same week
- Ensure that IAEs are receiving copies of all e-mails
- Indicate which students took online courses on the Chapter Marketing Report
- Communicate with chapters on the rebranding project and to hold off on mass ordering anything with the IREM® logo
- Share list of CPM® Sponsors and Sponsees with chapters

**Chapter Operations Report Review:**
The Chapter Operations Report is an annual report for chapters to benchmark their operational efforts and membership engagement against other chapters. Prior to 2016, it was done every three years, however due to its popularity in 2016, IREM® HQ decided to conduct the survey and provide the results on an annual basis.

In addition to this report, there is the Chapter Administration Profile. That is also an annual report and it is for chapters to benchmark their administrative structure against other chapters of a similar size. The IAEs were asked if they thought having two reports with similar names was confusing. They suggested that IREM® HQ change the name of the Chapter Administration Profile to something such as “IREM® Association Executive Job Analysis” to more accurately reflect the report’s content as well as continue to push away from the IAEs’ previous title of Chapter Administrator.

The IAEs requested that the survey input email request be sent to Chapter Presidents as well as the IAEs to ensure that the Chapter Presidents are aware that the IAEs have been requested to participate. This may also increase participation which will enhance the validity of the data.

The IAEs were then asked if their chapters used the reports, and if so, how did they use them. Not all chapters used the reports, however one of the IAEs was able to get more hours added to her contract as well as a phone to use for chapter related business. It was deemed that the raw data in Excel form is more useful than the final report complete with graphs because the Excel report can be sorted and the information can be read in whichever way the user chooses. The IAEs requested that when IREM® HQ delivers the final report that the Excel report be included as well.

The IAEs noted that some of the questions on the survey were either difficult to understand and/or took too long to tabulate. They requested that more direct questions be asked even if it means that there are more questions. They requested that a PDF of the questions be attached to the input email request so that they can review them prior to logging in to the survey.

**Chapter Operations Report Review Action Items:**
- Formally change the name of the “Chapter Administration Profile” to “IREM® Association Executive Job Analysis”
- Send all communication regarding the input requests to both IAEs and Chapter Presidents and include a PDF of the questions
- Include the report data in Excel with the final report
- Simplify the questions on the survey to ask more direct questions that are easier for chapters to answer
IAE and Chapter Leader Professional Development:

Professional development is important to staffs’ success as association management professionals and chapter leaders’ success as volunteers. IREM® is committed to developing its volunteers and chapter staff.

IREM® also recognizes that one of the key components of a chapter’s success is the expertise of their IAE. Therefore, professional development of chapter staff is a top priority for 2017 as we continue to partner with chapters to achieve IREM’s strategic goals.

In order to determine what professional development opportunities there are, the IAEs were asked to write out ideas on what they need, want or desire to be trained on. They were asked to keep the following groups in mind: chapter leaders, the smallest chapter in their region, the largest chapter in their region, themselves, other IAEs and the RVPs while doing so.

All ideas were shared and grouped together to determine when and what format would be best. Some challenges discussed were IAEs having various levels of experience, what type of training that has been done in the past that was not effective enough and what are new formats we could do to shake things up.

The following ideas were suggested for the three chapter learning sessions during the IREM® Global Summit:

- Volunteer Relationships (Doug Hinderer, NAR SVP of Human Resources)
- Sunsetting People or Programs / Data-Driven Decisions
- Non-Profit ≠ NO Profit

The following ideas were suggested as topics for discussion during the IAE Power Session at the IREM® Regional Meetings: Being a Change Agent; Enhancing Negotiating Skills; Determining Non-Dues Revenue Generating Opportunities; Planning for the Big Picture; Web Resources for New(er) IAEs and Re-Engaging Members

The following ideas were suggested as topics for the IAE Symposium at the IREM® Global Summit: UBITs/Important Tax Info; Getting out of a rut; Social Media training; another Technology Show & Tell with IREM’s Director of IT, Alex Levin; the Dos & Don’ts of Graphic Design; and possible breakouts on IAE Job Description writing; Earning the CAE designation; StarChapter training and Microsoft Excel training.

Other topics that were suggested are: Advocacy for Dummies; Recruiting New Volunteers; Re-engaging Past Presidents; Succession Planning; Gen-Z – what to expect; Roberts Rules; Public Speaking and Establishing a successful Industry Partner Program

IAE and Chapter Leader Professional Development Action Items:

- Finalize, develop, and deliver the chapter learning during the 2017 IREM® Global Summit and IAE Symposium
- Continue to provide education and opportunities for strengthening the relationship between IAEs and chapter leaders
- Review the list of professional development action items and wish list items from previous meetings and conferences to determine the best format for facilitating discussion and delivering customized education
Miscellaneous Action Items:

- Foster more collaboration amongst regions
- Review the frequency of communications sent by IREM® Headquarters’ staff and try to condense the amount
- Provide more web training – at beginning and advanced levels – for those chapters that have recently converted their web platform to StarChapter
- Increase transparency and open dialog between IREM® Headquarters and chapters

Next Steps
The IAEs who serve on the work group play a key role in marshalling this information to other IAEs and chapter leaders, as follows:

- Distribute report to all chapters
- Assist in developing the IAE Symposium in Chicago at the IREM® Global Summit

The IAEs also serve as a sounding board for the duration of the year on new programs or services that affect the chapters. They will serve as mentors for any new IAEs this year. They will also work with Headquarters’ staff to execute the action items outlined through this document.