

Ten things it would have been nice to know before taking on an AE position

After eight and a half years as an AE, the questions that should have been asked about the position are very apparent. At the age of seventy-three however that they will ever be asked by me is unlikely. For those who are far earlier in their life and career, and because all associations will need to hire an AE at some point, sharing felt necessary.

Please provide copies of the following:

- Two most recent Core Standards Compliance submissions
- Value proposition for affiliates
- Mission Statement, Vision Statement, and Culture Statement none of which can reference MLS
- Current Bylaws, Policy Manual, and Staff Manual
- Three-year budget
- Monthly Cash Flow Analysis, P & L, Balance Sheet, Accounts Receivable Report, and he last two years 990's filings to the IRS.

Describe the "culture" of your staff. _____

What percentage of total revenue is derived from dues and dues-related fees (MLS income excluded):

Year: _____	Amount: _____	Percentage of total revenue: _____
Year: _____	Amount: _____	Percentage of total revenue: _____
Year: _____	Amount: _____	Percentage of total revenue: _____

What are the association's annual growth and attrition rates?

Year: _____	Growth Rate: _____	Attrition Rate: _____
Year: _____	Growth Rate: _____	Attrition Rate: _____
Year: _____	Growth Rate: _____	Attrition Rate: _____

When was your Strategic Plan updated by an outside facilitator? _____

How often is your Strategic Plan reviewed by a group other than the Board of Directors? _____

What percentage of your brokers are involved in the Broker Involvement Program? _____

What process is currently used to populate association committees, task forces, work groups and your board of directors?

Member Engagement, not including MLS:

- How do you measure it? _____

- Engagement by the numbers:
12 month period: _____ % of total membership: _____
12 month period: _____ % of total membership: _____
12 month period: _____ % of total membership: _____

Describe your leadership development program: _____

