



TM

## **Creating a New Association**

### **Overview**

Transform is a program to facilitate the evolution of a local Association into a new organization to improve performance in a changed world. It is for solid performing Associations that want to take that next step of excellence.

In any business downturn there is great opportunity. The most successful firms in every industry increase market share with actions taken during recessions. The changed real estate market has negatively altered many REALTOR® associations. But some Associations will take advantage in this time of change, and prosper.

The real estate business will be different after this downturn. Expectations of Associations will also change. Associations can position now to be a new organization when the market cycles back. The areas typically leading such a transformation are: Business Skills, Professionalism, Member Relations, Communications, Business Information, Technology, and Public Policy.

The National Association of REALTORS® sponsors a limited number of the Transform Programs. Jerry Matthews is the creator of Transform and provides the professional services. NAR's objective is to support local Association efforts to best serve their members and professional staff. NAR will pay the professional fees of Matthews and is not responsible for any other sub-contractor fees or expenses. The participating Association will pay the travel expenses of Matthews and any local meetings cost.

## **Process**

The Transform program analyses trends affecting real estate, local issues, the current status of the Association, competencies, and creates a plan for it to be of greater value in the future. The process involves research, presentations, individual interviews, and group creative sessions.

Transform will enable the Association to know what opportunities exist to evolve into a more effective organization in the future, trends in the industry, scenario possibilities, opinions of key stakeholders, leadership and AE issues, a strategic vision, and sequential actions to accomplish change.

A Transform proposal customized for the situation and the Association is created. The Association will complete a memorandum of interest agreeing to provide all information, if necessary, for the program.

## **The Facilitator**

Jerry Matthews assists organizations and individuals in creating a successful future. He specializes in facilitation of the strategic thinking process, presentations on future trends, and organizational restructuring. Jerry has over 27 years of experience as CEO of the Florida and Illinois REALTOR<sup>®</sup> State Associations. He is recognized for interpreting future trends and concepts through personal presentations and videos.

As an advisor the past 7 years, Jerry has made over 200 presentations (keynote speeches, visioning sessions, workshops, leadership training) on future trends. He has also completed 150 Strategic Planning events. Many of these were part of multiple planning steps (surveys, focus groups, trends presentations, shareholder sessions, planning retreats, implementation). In addition, Jerry has advised on numerous MLS and Association restructuring and mergers. The majority of these events were for the REALTOR<sup>®</sup> family –national, local, state associations, MLSs and firms.

Personal interaction with thousands of members has given Jerry a true depth of understanding of real estate challenges and trends. Such experience creates realistic strategic sessions and accurate planning. And he thoroughly enjoys the action – the debate – the creativity – the fun – of future planning.

Contact: Jerry Matthews at 407-876-1495 or [Jerry@JerryMatthews.com](mailto:Jerry@JerryMatthews.com)

Transform and the transform logo are trademarks of Gerald W. Matthews.



## Memorandum of Invitation

This is an official invitation for Jerry Matthews to conduct the Transform Program for our Association. We understand the following:

Transform is a program to facilitate the evolution of our Association into a different organization to improve performance. Matthews is solely responsible for selection of an Association for the program.

The Transform program analyses trends affecting real estate, the current status of the Association, and creates a plan for it to be of greater value in the future. The process involves research, presentations, individual interviews, and group creative sessions, which may or may not specifically include surveys, focus groups, scenario development, trends sessions, and visioning retreat depending on our current position.

At the conclusion of the project the Association will know what opportunities exist to evolve into a more effective organization in the future, and have a written report with implementation steps.

We agree to provide all documents and information requested on a confidential basis to Matthews. He will not share that information with any other entity, including NAR.

We are fully committed to the concept of evolving the Association to new level and agree to participate in and support the process.

Association: \_\_\_\_\_  
Date

President: \_\_\_\_\_  
Date

President Elect: \_\_\_\_\_  
Date

Association Executive: \_\_\_\_\_  
Date