

NAR Spire Mentorship Program Mentor/Mentee Pairing Process

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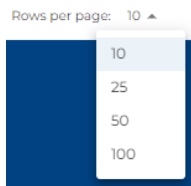
Exporting Your Roster

Please follow these instructions to download a master list of the mentors/mentees participating in Spire in your state. Even if you are a local association, please begin by exporting the full state list.

Start by opening mentor.apps.realtor (ideally in Chrome).


Step 1: Adjust the view

- Scroll down to the bottom of the page and adjust the view so you see **100 rows per page**. This is crucial to being able to export all your applications to one place.
 - The export button captures the application showing on your screen, so if you only have 10 rows per page, you will only export 10 applications per spreadsheet.



Step 2: Search by State

A screenshot of the NAR Spire Mentorship Program search interface. At the top, there is a blue navigation bar with the NAR logo and links for Home, Search, Store, Contact, Pay Dues, and Log Out. Below this is the NAR Spire logo and the text 'NAR's Mentorship Program'. A search bar labeled 'Search Full Documents' is positioned to the right of the logo. Below the search bar is a search form with six fields: 'State/Province', 'First Name', 'Last Name', 'Local Association', 'Application Status', and 'Submission Date'. Each field has a search input box. The 'Application Status' field is a dropdown menu.

- Open Dashboard
- Use State/Province field to search for your state by the two-letter abbreviation (use IL not Illinois)
- Download the **entire state list** using the export button on the top right corner 
- EVEN IF YOU ARE A LOCAL ASSOCIATION, please export the entire state list.

Step 3: Finding remaining applications

- Repeat Steps 1 and 2 but search for full state name to pick up any remaining applications (you may not have additional applications in this search, but it's good to check just in case!)
- Export this sheet and copy & paste the applicant rows to your existing spreadsheet

Step 4: Remember, please export the entire state list (Steps 1-3). If you fail to do so, please see below for how to identify all your participants as a backup.

- For mentors: you may filter using the "local association" field if you want to find specifically affiliated mentors. Please search for all variations/abbreviations of your association name if you are doing so. This should catch mentors who used different names.
 - (For example, search for "NAR" and "National Association of REALTORS" and "Nat'l Association" if those may be used by your members.)
- For mentees: make sure you include the mentees who have "n/a" listed as their local association. They may not know what the nearest local board is, especially if they are brand new to the industry.

"Claiming" Participants

Once you have a full state participation list, please use the following instructions to identify which mentors and mentees enter your roster. The claiming process should be used to expand your roster and include mentors and mentees who are in your geographic area to maximize the potential for in-person pairings. You may use this process to add to both your list of mentors and your list of mentees.

*All claiming updates must be inputted to the Spire Dashboard by **Friday, August 9th** COB.*

Step 1: Who can I claim?

- For Member-Mentors: you are entitled to mentors who are members of your association.
 - **State Associations:** If a local association in your state is participating, they have first refusal for the mentors in their local association. As the state association, you are entitled to all the members who are not already affiliated with a local Spire Partner Association. Please refer to the list of all Spire 2023 Partners and work with your local associations' Spire Champion to verify.
 - **Local Associations:** If a mentor is a member of your association as well as a secondary local, that mentor is part of your roster, unless that mentor has requested to be paired in their secondary association.
 - *Spire Staff may have additional mentors or mentees in your area that you can claim.*
- For Member-Mentees: you are entitled to the mentees who are members of your association.
- For Non-Member-Mentees: you are entitled to the non-member mentees that you recruited to the program.

- **For both Mentors and Mentees:** You are entitled to the non-member-mentees who are most geographically proximate to your association, provided they are not closer to another Spire Partner Association.
 - If a Mentor or Mentee is a member of a nearby local association that is not a Spire Partner Association, you may claim that mentor or mentee.
 - If a mentor or mentee is a member of or closer to a neighboring local association that IS a Partner Association, you may not claim that mentor or mentee without discussing with the Spire Champion. The other Partner Association has first refusal over the mentor or mentee and may forfeit the applicant to you if their numbers are aligned as is.
- ***How you keep track of this is up to you, but nothing is formalized until you update the Dashboard.***
 - Spire Staff recommends copying & pasting the rows for your participants into a new tab or worksheet so you can grow your roster and still refer to the full state list. Then proceed to Step 2.
 - While you claim participants please note: due to high volume of applications, you may pair 1 mentor with 2 mentees

Step 2: How do I claim an applicant on the Dashboard?

- To “claim” an applicant, please start by opening their individual application
- **Part 1:** In the “local association” field, if there is none listed, or the mentee wrote “n/a” you may insert your local association’s name.
- **Part 2:** Update the applicant’s status in the drop-down menu at the bottom to “candidate under review” or “accepted, awaiting pairing”
- Scroll to the bottom and click “submit” to save your changes.
 - If there is another association listed there, please confirm if they are a Spire Partner Association or not.
 - If the listed association is NOT a Partner, you may claim this mentee by typing your association’s name in this field. Scroll to the bottom and click “submit” to save your changes.
 - If the listed association IS a Spire Partner, please do not use this mentee without discussing with the Spire Champion at that Association.
- All claimed mentors and mentees must be updated in the Spire Dashboard by **Friday, August 9th** COB.
- If you come across an applicant that is no longer participating in Spire, please use one of the templated rejection emails and update the Spire Dashboard to indicate their status as “Withdrawn”
 - See “NAR Spire Rejection Letters” for multiple options based on circumstances (no longer interested, does not meet the qualifications, unresponsive, etc).

Pairing Mentors & Mentees

- Please prioritize geographic location
- Note the applicants’ areas of interest and look for alignment

- Use demographic information and specific requests to offer more aligned experiences
 - Carefully track which mentors and mentees have already been paired up and who is still awaiting a partner
 - Due to high volume of applications, you may pair 1 mentor with 2 mentees. If possible, try to determine which of your mentors are willing to take on a second mentee
 - Update the Dashboard once a mentor or mentee has a pair, so they do not get doubled up!
 - Spire Staff will help with finding extra mentors or mentees when needed but can only have an accurate sense of the numbers if this change is reflected in the dashboard.
 - All pairings should be completed, and mentors/mentees notified by EOD on **Friday, August 23rd**.
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Introductions

- Please confirm with participants that they are interested in and committed to the mentorship program prior to making introductions.
- If a mentor has more than one mentee, please send separate emails for each mentee. Each email should only go to the mentor and one mentee at a time.
- To introduce mentors and mentee pairs, please use the following text in the body of an email sent to both your mentor and mentee.
- Please tend to all highlighted parts with the required information
- Please make sure all introduction emails are sent out by EOD on **Friday, August 23rd**.
- Shortly after sending this email, please send both participants the mentorship agreement via DocuSign, and cc mentorship@nar.realtor.

Subject line: NAR Spire: Mentorship Introductions

Hello **[MENTOR NAME]** and **[MENTEE NAME]**,

Welcome to NAR Spire 2024! CC'ed on this email you will find your mentorship partner! We are so thrilled to be introducing mentors and mentees to each other so you can connect and discuss the duration and frequency of your meetings. We know that schedules can change over the next 4 months but strongly encourage you to communicate about your expectations and preferred meeting structures prior to signing the Mentorship Agreement on DocuSign, coming soon.

MENTOR FULL NAME (Mentor) can be reached at (XXX) XXXX-XXXX or EMAIL@EMAIL.COM

MENTEE FULL NAME (Mentee) can be reached at (XXX) XXXX-XXXX or EMAIL@EMAIL.COM

We hope you can take advantage to make this mentorship program an in-person experience if possible. Please take the next few days to connect and discuss the duration and frequency of your meetings. We know that schedules can change over the next few months but strongly encourage you to communicate about your expectations and preferred meeting structures before signing the Mentorship Agreement via DocuSign. If you have any questions over the course of your mentorship you can always reach out to me **[SPIRE CHAMPION OR STAFF MAKING THE INTRODUCTION]** at **[EMAIL]** for more support.

We are looking forward to seeing you at our zoom Mentorship Opening Session on September 9th 2024, 10am-11am Pacific | 11am-12pm Mountain | 12pm-1pm Central | 1pm-2pm Eastern. You have been

registered for the event using the email you provided on your Spire application. Recordings will be made available to those who cannot attend but we strongly encourage you to log on if possible.

Thanks again for being part of Spire!

[SPIRE CHAMPION NAME]

- In addition to sending out the Introduction Email, please send all pairs a copy of the Mentorship Agreement through DocuSign. Spire Champions and Spire Staff at NAR (mentorship@nar.realtor) should be copied on all DocuSign envelopes.
- If you receive a response from a participant that they are no longer interested or able to participate in the program, please update their record on the dashboard to say “withdrawn” and find a new match for their mentorship partner. Please notify the remaining partner that they are being re-assigned and you will be in touch when you have a new pair for them.

Deadlines:

- **Friday, August 9th:** Update Spire Dashboard to reflect all claimed participants in your local association
- **Friday, August 23rd:** Match and notify all mentors and mentees of pairs. Send introduction emails and mentorship agreement via DocuSign.
- **Friday, August 30th:** Send mentorship@nar.realtor your pairings! Can be word doc, email body, or spreadsheet with confirmed pairs who completed the agreement.

Please reach out to mentorship@nar.realtor for assistance through this process. There are many details and it is easier when you are working with actual applications instead of just reviewing the process on a word doc. We are happy to help!