

**GOLDEN ISLES ASSOCIATION OF REALTORS®**

**Strategic Plan**

**2014-2016**

**Approved June 6, 2014**



## **GOLDEN ISLES ASSOCIATION OF REALTORS® Statements of Vision, Core Purpose & Mission**

### **MISSION:**

***We are a REALTOR® Association committed to professionalism, sound ethical practices, and community involvement among our members, while promoting and protecting property ownership.***

### **VISION:**

***Recognized for enhancing the quality of life in our community.***

### **FOCUS AREAS / STRATEGIC OBJECTIVES**

- 1. Community Outreach - Public Relations, Community Projects, Advocacy and Education***
- 2. Governance Administration & Finance - Structure, Operations & Administration***
- 3. Legislative Advocacy - Private Property Rights, Monitor Public Policy at National, State, and Local Levels to Protect Real Estate Industry***
- 4. Member Services - Communicate and Promote Role of Association: Protecting Property Rights and Property Ownership, Benefits, Affiliations***
- 5. Professional Development - Catalyst for enhancing growth, development and professionalism, Integrity and Accountability***

# **GOLDEN ISLES ASSOCIATION OF REALTORS®**

## **Strategic Objectives**

### **Community Outreach**

Guiding Purpose: The Golden Isles Association of REALTORS® strives to make a difference in our community through the contribution of time and resources of our members to non-profit, civic and community based organizations.

1. Identify, promote, and coordinate impactful opportunities for members to engage in community service projects and events:
  - a. Do so by developing and by following policies and procedures that define what organizations/groups would be most impacted by the Golden Isles Association of REALTORS® involvement (see 1B under governance).
  - b. Educate to the public that the term REALTOR® is synonymous with professionalism and competency when promoting community accomplishments.
  - c. Reflect in communications that REALTORS® encourage and support relationships with organizations representing diverse groups of members and accommodate diverse members and consumers.
  - d. Relate that REALTORS® adhere to a strict code of ethics and encourage the consumer to select a REALTOR® as a trusted resource for all real estate services.
2. Identify the needs of selected organizations in our community.
  - a. Charge leadership and Community Relations Committee to meet with community/non-profit experts to help develop a strategic approach for the association and community relations committee to impact the community and provide appropriate recognition for the Association within the community.
  - b. Priority consideration will be given to efforts/charities that promote home ownership.
3. Focus on providing volunteer time and money to those organizations.
  - a. Through the Community Relations Committee.
  - b. Through budgeting and fundraising.
4. Communicate achievements (accomplishments, triumphs) to the membership and the community.
  - a. Develop an annual local public relations/communications plan for the Association.
  - b. Necessary to provide marketing dollars to communicate through public announcements, advertising and social media. Marketing dollars included in planned budgeting.
  - c. An associate staff member to have the responsibility of constructing timely press releases about association efforts, accomplishments and distribute them to appropriate media outlets.

## **Governance, Administration, & Finance**

Guiding Purpose: The Golden Isles Association of REALTORS® is accountable for the absolute adherence to our fiduciary duties.

1. Maintain and assure fidelity to governing documents in accordance with corporate law.
  - a. Provide clarity of duties, responsibilities and authority in governing documents.
  - b. Develop more written comprehensive policy and procedures specifically for each committee. Shall include any pertinent past decisions/success failures that would be meaningful to future leadership. (our thoughts are that each committee chair should be charged with providing key information by year end. )
2. Maintain and assure responsible management of the associations assets.
  - a. Establish a facilities Presidential Advisory Group (PAG) to analyze the current and future real estate needs of the Association.
  - b. Identify and evaluate additional revenue sources.
  - c. Establish an investment plan and a risk level tolerance.
  - d. Identify any geographic growth opportunities, mergers, or shared services.
3. Retain knowledgeable and skilled staff to assure effective delivery of services to the members.
  - a. Gather comparative salary and job responsibilities information to ensure our compensation packages are competitive.
  - b. Staff to complete online Association Management Course.
  - c. MLS Admin to attend RETSO.
  - d. CEO to provide Staff development education of Association operations.
  - e. Billing Coordinator to attend Regional/AE Conference.
  - f. Establish and implement a CEO review process.
  - g. Expand Staff to include part time receptionist.

## **Governmental Affairs/Legislative Advocacy**

Guiding Purpose: The Golden Isles Association of REALTORS® engages our members and the community through education, promotion, and protection of housing opportunities and private property rights.

1. Promote the benefits of home and private property ownership opportunities.
  - a. Develop an annual local public awareness plan for the local association.
  - b. Offer an educational session on the benefits of home ownership to our members with up to date tax and other benefits.
  - c. Implement an annual Homeownership Roundtable for local elected officials.
2. Educate our members on legislation and public policy that influences real estate.
  - a. Local monthly governmental affairs update communication through electronic (CONVIO), video, and verbal delivery at membership meetings.
  - b. Implement campaign to get local members to sign up for GAR and NAR Legislative Update and Calls to Actions.

- c. Improve the presentation of the RPAC/Governmental Affairs information at the New Member Orientation by incorporating video, real life scenarios, script and for “Calls for Action.”
- 3. Encourage our members to participate in the political process:
  - a. Contact all past Sterling “R” contributors to get feedback on “Why Not Now?” and make a personal ask to contribute at that level again.
  - b. Contact Top 20 producers in the Association to ask why they aren’t Sterling “R” contributors and take opportunity to educate them on benefits of engagement.
  - c. Video Invite from GIAR President to attend GIAR sponsored political forums.
- 4. Analyze and influence proposed legislation and regulations impacting our local community and/or private property rights.
  - a. Develop and implement a structure to the Governmental Affairs Committee so that at least one member is assigned/responsible for reporting activity/issues for each governmental body .
  - b. Develop a stronger relationship with the chamber’s Governmental Affairs Committee by having overlapping members and on-going communication of the two committee’s work to each other.
  - c. Have an elected official, or other government official or subject matter expert, report to the Governmental Affairs Committee for the first 10-15 minutes of each meeting. (Challenge - State/National level representation).
- 5. Leverage financial and subject matter expert resources available to our community and association through GAR and NAR.
  - a. Charge Gov’t Affairs Committee to review each year the Smart Growth Program and any other grant programs and other resources.
  - b. Gov’t Affairs Committee Chairman and committee members shall be encouraged to attend training available through GAR and NAR.

## **Member Services**

Guiding Purpose: The Golden Isles Association of REALTORS® promotes and provides resources, programs, and services to meet the evolving needs of our members.

- 1. Identify, promote the value, and effectively communicate the positive aspects of participation within the association.
  - a. Create a brief one page brochure that promotes being a REALTOR® member of the Golden Isles Association; targeted at new licensees.
  - b. Identify disengaged brokerages and/or brokers and have members of the leadership team and/or others serve as an engagement liaison to them to reach out, communicate, solicit feedback and “mentor.”
  - c. Create and promote positive and creative REALTOR® messaging at the Association Office.
  - d. Re-evaluate the new member orientation presentation.
  - e. Work to develop a greater culture of inclusiveness:  
Name tags for all Chairman and Directors/Leadership.

- Encourage leadership and committee chairs to seek out additional opportunities to engage the Members
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2. Deliver essential and valuable programs, resources, and services to members
    - a. Evaluate current communication levels and methods used to be in touch with general membership, committees, and leadership.
    - b. Survey membership on communication preferences, review current research and tools on best practices for communication to association membership and then develop a communication plan/procedures that are effective and within the capacity of the association staff.
    - c. Align monthly membership program topics with strategic priorities of the association by the Programs Committee, reviewing the strategic plan *and the (DSA which assists in keeping the association in certification standards with NAR)*, getting input from committee chairs, leadership team and membership.
    - d. Create an Affiliate Advisory Council which will meet semi-annually to give input on affiliate roles and engagement, programs, services, etc. Council will include participation from leadership team to help disseminate information and feedback.
    - e. Work towards increasing the value of Affiliate Memberships and sponsorships.
  3. Provide cutting edge technology and state of the art resources to serve the needs of our members.
    - a. Task the Technology Committee or a subcommittee with evaluating the effectiveness of technology, programs, and services currently in use (Navica, Lockboxes, etc.)
    - b. Research teleconferencing / webcam software in order to host committee meetings online.

## **Professional Development**

**Guiding Purpose:** The Golden Isles Association of REALTORS® challenges members to enhance their knowledge, professionalism, and integrity, all while inspiring and nurturing future leadership.

1. Identify, encourage and mentor future leadership: HOW?
  - a. Identify and understand the generation (X, Millennials).
  - b. Develop a multi media campaign (social media, email, print, web presence) - “What’s it in for me?”
  - c. Research the feasibility of developing a mentor program.
  - d. Develop a survey to identify triggers for involvement.
  - e. Assign members of the BOD and Member Services Committee a monthly quota for member engagement.
  - f. Evaluate the feasibility of the continuation or strengthening/replacement of YPN (Young Professionals Network).
2. Identify Brokers who are not actively participating and communicate the value of the association by means of personal visits by President and CEO.
  - a. Identify and engage brokers by doing a member needs assessment.

- b. Develop a brief presentation which explains the benefits specific to a broker to be presented by means by the President/CEO. Schedule an appointment that would take no longer than one hour, unless Broker would like more time. ASK what they want and what they need to make them do their business better.
3. Create a Leadership Development Program:
  - a. R&D (Research and Duplicate rather than start from scratch) - Research other associations to see what they offer; example: NAR Leadership and GAR Leadership (scale to a local association).
4. Provide current, diverse and quality educational opportunities:
  - a. Electronically survey members for class topic ideas.
  - b. Develop a short paper survey for immediate feedback after a class asking what type of courses the student wants. IF classes are scheduled per the survey, send email to inform those members that asked for class that class has been scheduled.
5. Champion the doctrine of the NAR Code of Ethics and the expectation of model ethical conduct:
  - a. GIAR to provide the Code of Ethics course quarterly (already doing).
  - b. Educate new REALTOR® members at quarterly orientation (already doing).
  - c. Share professional standards case studies with the membership as they become available.
  - d. Distributing the Code of Ethics brochure at Member Orientation.