

Frederick County Association of REALTORS® (FCAR) 2018 Strategic Plan Rewrite

Preface

In March, 2017 a cross-segment of the membership met to revise the FCAR Strategic Plan. In attendance were sixteen members comprised of:

- Six members of the 2017 Board of Directors (BOD) including Past President, President, President-Elect (myself) & Treasurer
- Communications Director
- Six Committee Chairs / Vice Chairs
- Two staff members
- One Real Estate Commissioner

The group was professionally moderated by Lisa Cameron and was full of heavy hitters which including me, contained six association Presidents and a former state association President. The output of that exercise was the 2017-2020 Strategic Plan. Prior to the session, Ms. Cameron gave the group instructions for their primary task as follows:

- 1) Retain the goals & objectives that are still relevant and discard those that have been completed or are no longer relevant in the current plan and
- 2) Add new goals & objectives as mutually agreed to in order to produce a new Strategic Plan for 2018-2020
- 3) The basis for many of the needed changes to our current Strategic Plan is NAR's Core Standards for local associations

A few months after the plan was completed, I attended NAR's Leadership 200 & 300 series as President-Elect during the NAR Leadership Summit in August, 2017. In those classes I learned for the first time that the Strategic Plan is the primary tool for an association President to manage the BOD during his or her term as President. The class stressed that there's no need for a President to come in and make radical changes because the Strategic Plan is already in place. I also learned that many associations attend an annual retreat in which they prioritize the Strategic Plan to determine which action items the BOD would focus on during the year, which passes quickly. Simply put, there's only so much that can be done within any BOD year.

The 2017 FCAR Finance Committee budgeted funding for a BOD retreat in 2018 and as part of my preparation for that event, I reviewed the 2017-2020 Strategic Plan several times. While the document was comprehensive and full of admirable goals and objectives, I did not believe it was written in a manner that made it useful from a management perspective. I spent a lot of time preparing for our upcoming retreat and wanted to give useful information to the 2018 BOD so everyone would come prepared to prioritize the existing plan. In the end, I saw a pattern that I

thought would be truly useful for me and future FCAR Presidents to use the Strategic Plan as an effective management tool.

I noticed that the 2017-2020 Strategic Plan had five goals, but three of those appeared to combine two logical categories (for instance, Consumer Outreach & Member Advocacy). If those were split up, we'd have eight goals. Furthermore, there was a major category of work that the association does that wasn't well represented in the plan (Community Outreach). If that were added, we'd have nine categories and, with nine BOD members, excluding the President, each BOD member could be assigned a category to manage for the year. That would allow us a way to efficiently assign tasks and track progress to achieve the objectives set out in the Strategic Plan. In short, we would add structure and accountability.

Prior to the retreat I sent that idea to the BOD to ponder. BOD members were very supportive and agreed to reorganize the plan into nine categories during the retreat, which was professionally administered by consultant Julie Gaver. During the early part of the first day of the retreat, the BOD agreed that it couldn't effectively reorganize the plan without a complete re-write, so the focus of the retreat then became re-writing the plan to become a document that both organized the goals logically and updated them based on new long-term goals of the current BOD (improve the professionalism of members and staff, improve the member experience, increase association involvement, etc).

The 2018 BOD believes that if done correctly, the Strategic Plan will become a living document, one that can be modified annually, rather than once every three or four years. As long as the categories remain relevant, future BOD retreats can focus on determining the two primary tasks suggested by Ms. Cameron, 1) Retain relevant goals, discard non-relevant ones and 2) Add new goals as-needed. Once the plan is updated, each BOD member would then take responsibility for one of the categories and the President would have someone to hold accountable for that part of the plan during his/her tenure over the fiscal year.

Prior to the retreat, I sent out and asked the BOD members to review the previous Strategic Plan and the Bylaws. In hindsight, sending out the Strategic Plan and the NAR Core Standards would have been more appropriate. I suggest future BOD Presidents do this going forward.

I take the time to write this and include it in the plan so future FCAR President's understand why it was done (add managerial structure) and how they can use the plan and the process to manage the BOD during their tenure.

Greg Phillips
2018 FCAR President

Frederick County Association of REALTORS® 2018 Strategic Plan

MISSION

The mission of the Frederick County Association of REALTORS® (FCAR) is to enhance its members' professionalism and adherence to the Code of Ethics, and to raise the awareness of the value of REALTORS® through community and political involvement in protecting real property rights. FCAR achieves its mission through collaboration with Maryland REALTORS®, the National Association of REALTORS® (NAR) and other like-minded organizations.

GOALS

- 1) **Communication**: FCAR will effectively communicate its accomplishments to the public and provide superior communication to the members (*Director Thompson*)
- 2) **Professionalism**: FCAR will constantly strive to improve the professionalism of the members and staff (*President-Elect Nichols*)
- 3) **Association Involvement**: FCAR will encourage internal volunteers for association activities to groom future leaders – “Serve the association that serves you”! (*Secretary Addington*)
- 4) **Member Experience**: FCAR will focus on improving the overall membership experience (*Past President Marsh*)
- 5) **Advocacy**: FCAR will be the “Voice For Real Estate” in Frederick County with elected & appointed officials, allied organizations and the general public (*Director Mackintosh*)
- 6) **Organizational Accountability**: FCAR shall account for membership monies in a fiscally responsible manner via budgetary oversight, cost savings, promoting shared services and avoiding duplication of services (*Treasurer Meldrum*)
- 7) **Education**: FCAR will enhance membership value by providing high quality education (*Director DeLaquil*)
- 8) **Community Service and Consumer Outreach**: FCAR will provide opportunities for members to support local charitable needs via fundraising, outreach and special projects (*Director Friend*)
- 9) **Technology**: FCAR will utilize innovative technology to benefit the members and staff (*Director Foley*)

Goal 1. Communication: FCAR will effectively communicate its accomplishments to the public and provide superior communications to the members (*Director Thompson & Communications Director*)

A) Communication To The Public

A1: Develop and implement a Public Relations Campaign.

- i. Establish relationships with news sources and local media (i.e. FNP, WFMD, etc)
- ii. Improve social media public relations campaign
- iii. Develop public and media facing website
- iv. Establish an annual schedule of meetings/events that will create relationships between FCAR and its committees & brokers/managers

A2: Promote REALTORS® to the Public

- i. Better utilize NAR's existing resources for enhancing the image/value of Realtor®
- ii. Promote positive contributions of REALTORS® and FCAR within the community

B) Communication ® Members

B1: Review job description for Communications Director

- i. Re-align tasks of Communications Director compared to goals established
- ii. Explore full time vs. part time position and responsibilities of Communications Director (i.e. determine if public relations & marketing skills should be required)

B2: Improve communication between FCAR and the membership

- i. Build a website portal to allow members to choose how they wish to be contacted (email, text, Facebook, etc.)
- ii. Explore additional vehicles for distribution of newsletters and other communiqués
- iii. Utilize YouTube channel to better promote events and programs. (i.e. President's Report)
- iv. Investigate alternate channels for urgent messages
- v. Continue improvement of communication through social media
- vi. Implement tools to engage members through their mobile devices
- vii. Establish channels of communication to promote BOD objectives to the committees and local office managers & brokers

B3: Better communicate the value of membership to the members

- i. RPAC and Advocacy
- ii. Update membership brochure
- iii. Include mention of NAR & Maryland Realtors® membership in membership value

Goal 2. Professionalism: FCAR will constantly strive to improve the professionalism of the members and staff (*President-Elect Nichols, Staff*)

A) Improve Member Professionalism

- i. Promote Maryland Realtor's® new class "Professionalism" to everyone, including brokers, agents, FCAR staff and brokerage staff.
- ii. Stock up and utilize Maryland Realtor's® "Raising The Bar For Realtor® Professionalism" pamphlet
 - a. Display prominently in FCAR's office
 - b. Give to new members at orientation
 - c. Pass out at all FCAR classes
 - d. Give to brokers to distribute to their agents and staff
- iii. Breathe life into the Code of Ethics training (i.e. include case studies, seek out more engaging instructors, etc.)
- iv. Incorporate current NAR President/CEO's "Own It" slogan

B) Improve Staff Professionalism

- i. In conjunction with the Education Committee, require annual staff training on FCAR's mission, RPAC, Board of Directors, committee structure, professional standards and professionalism.
- ii. Review Association Executive and staff performance evaluation policies and procedures and update for clarity and consistency.
- iii. In conjunction with Technology Committee, develop a live, shared calendar to document staff tasks and deadlines
- iv. Document staff tasks to facilitate new hire training and cross-training of existing staff

C) Improve Volunteer Professionalism

- i. In conjunction with Education Committee (Goal 7.2), seek 100% participation for training programs designed for BOD members, committee chairs, vice chairs & members and Professional Standards committee members.

D) Utilize Ombudsman to help resolve differences between agents and brokers before the differences reach the level of ethics complaint or arbitration request

- i. Review and update Ombudsman qualification criteria
- ii. Seek qualified agents to be Ombudsman and ask them to enlist in the program
- iii. In conjunction with the Education Committee, implement Ombudsman training

E) Research and budget for additional future training programs for members and staff (i.e. Dale Carnegie, etc.)

Goal 3. Association Involvement: FCAR will encourage internal volunteers for association activities to groom future leaders. “Serve the Association that serves You!” (*Secretary Addington*)

A) Incentivize in order to promote involvement within the Association

- i. Design levels of incentives based on level of involvement within the association
- ii. Communicate the necessary budget to fulfill the incentives and work with Budget and Finance committee to fund
- iii. Communicate incentive plan with staff, determine responsibilities for execution and document procedures for replicating the process annually
- iv. Promote incentive program to the membership in June/July timeframe to recruit volunteers in advance of the next fiscal year

B) Develop a program for continual leadership grooming

- i. FCAR Past-President shall personally invite by July 1 of the current fiscal year, one or more members to apply for the Maryland Realtors® Leadership Academy (applications due August 1) and shall maintain a relationship with and publicly recognize applicants who are accepted and those who complete the program
- ii. At the beginning of each new fiscal year, each BOD committee liaison shall conduct a brief overview to educate their committee on FCAR operations (roles of the BOD & staff, RPAC, importance of volunteerism, etc.)
- iii. Develop materials to be used by the BOD for committee liaison overview sessions to ensure a consistent message
- iv. YPN BOD liaison shall encourage the committee to partner with other committees to jointly support fundraising and event planning in support of both the association and YPN mission
- v. Consider implementing an FCAR Leadership Academy

C) Ease the process of volunteering for FCAR committees

- i. Research virtual tools to allow the process to occur from both mobile or PC devices
- ii. Change committee membership process to automatically renew committee membership at the beginning of the new fiscal year
- iii. In conjunction with Communications Director, communicate the committee auto-renewal process to the members via multiple media

D) Develop a plan of consistent recruitment for FCAR

- i. Develop scripts to communicate the value of FCAR (what they receive for their membership dues) and value of volunteering to members and affiliates
- ii. Disseminate these value proposition scripts through the BOD binders, Committee Chair and Vice-Chair materials, staff manuals, training materials for New Member Orientation and the FCAR Website
- iii. Develop a plan to better involve FCAR broker members by re-implementing periodic broker meetings and exploring possibly incentivizing involved brokers or those whose agents are involved with the BOD
- iv. Develop a plan to be communicated in the BOD training that requires BOD to directly recruit volunteers, set goals for direct recruitment and track results

Goal 4. Member Experience: FCAR will focus on improving the overall membership experience (*Past-President Marsh, Membership Committee*)

A) Create an awards recognition program that recognizes members throughout the year and publicly celebrates their contributions

- i. Create a merit-based point system to rank association involvement (committee involvement, RPAC, Maryland Realtors®, NAR® involvement, etc.)
- ii. BOD will participate in an end-of-year spoof/show at this event

B) Improve the monthly membership meeting experience

- i. Research other venues for possible location change
- ii. Improve attendance by selecting new topics and timely/refreshing speakers
- iii. Encourage brokers to bring their office to monthly meetings
- iv. Consider an incentive for perfect meeting attendance to be given at the installation of officers event
- v. Encourage YPN to actively promote membership meetings to committee members
- vi. Use social media to promote the meetings
- vii. Consider offering free lunches to Past Presidents in attendance (propose a budget to Budget/Finance Committee)

C) Staff will greet members in a pleasant and welcoming manor when they walk into the office, speak with them in person or on the phone and in email communication

- i. Staff will be provided training on “soft skills” and customer service
- ii. Staff performance evaluations shall include goals for member service/satisfaction

Goal 5. Advocacy: FCAR will be the “Voice For Real Estate” in Frederick County with elected & appointed officials, allied organizations and the general public (*Director Mackintosh, Government Affairs Director May, Legislative Committee, Communications Director*)

A) Promote a strong Realtor® Political Action Committee (RPAC) by promoting the value of RPAC to members and meeting 100% of the annual fundraising goal

- i. Include language in our dues billing statement and other messaging encouraging FCAR members to include their voluntary “above the line” recommended contribution to RPAC in an amount adequate to meet NAR’s RPAC fundraising goal
- ii. Establish a dedicated RPAC web page on FCAR’s website which will be updated on a regular basis
- iii. Develop an annual RPAC fundraising plan with multiple events and opportunities for member participation
- iv. Encourage 100% RPAC investment by all Board of Directors members, committee chairs and co-chairs
- v. Increase Broker participation in RPAC and encourage Brokers to serve as an RPAC ambassador to their agents
- vi. Provide recognition and other benefits to RPAC Investors of \$99 or more
- vii. Mention/promote RPAC investment at every membership meeting, office visit and educational event
- viii. Educate members on the benefits of RPAC by producing and disseminating information provided by local, state, and national Realtor® organizations regarding the benefits of RPAC
- ix. Explore and make use of all appropriate RPAC fundraising programs and grant opportunities

B) Engage in the political process to promote pro-Realtor® issues at the local, state and federal levels

- i. Build relationships with local elected officials, governmental staff and other advocacy organizations
- ii. Inform local, regional, state and federal officials on issues affecting home ownership and property rights
- iii. Educate and evaluate candidates for local office through the Legislative Committee Candidate Interview process
- iv. Promote, host and attend events with local officials and candidates, including the Maryland Realtors® Lobby Day and candidate fundraisers
- v. Use all appropriate NAR and Maryland Realtor® programs to enhance local advocacy

C) Continually inform FCAR members of the association's advocacy efforts and encourage their participation in public policy issues

- i. Utilize the Broker Involvement Program and the Realtor® Party mobile application to achieve above-average participation rates on local, state and NAR's Calls for Action
- ii. Continue visits to member offices to promote value of FCAR's legislative efforts
- iii. Inform members of issues and FCAR advocacy efforts through the association's website and newsletters
- iv. Give a legislative update at each FCAR Monthly Meeting
- v. Provide opportunities for members to meet with their elected officials and staff, including candidate debates and town hall meetings
- vi. Consult with other FCAR Committees on issues of common interest

D) Become a trusted source of public policy information for Frederick County residents

- i. Disseminate information to members and consumers regarding issues that may impact home ownership and property rights through social media outlets and email
- ii. Arrange interviews through local media outlets with FCAR leadership to provide context to federal, state, and local real estate data
- iii. Submit an op-ed or letter to the editor of the local newspaper addressing specific issues
- iv. Use all appropriate NAR grant programs, in consultation with appropriate FCAR Committees

6) Organizational Accountability: FCAR shall account for membership monies in a fiscally responsible manner via budgetary oversight, cost savings, promoting shared services and avoiding duplication of services (*Treasurer Meldrum, Budget & Finance Committee*)

- A) FCAR shall operate with a balanced budget (independent of investment gains, dividend income &/or non-operational income)
- B) Create a sub-committee to explore a future strategic real estate purchase & develop funding strategies to enable this objective
- C) Continue shared service Government Affairs Director (GAD) program with surrounding local associations or allied organizations. Utilize the shared service program to strengthen relationships between the neighboring REALTOR® associations
- D) Explore other possible shared service opportunities to investigate possible shared Association Executive (AE), membership processing, education, event planning, etc
- E) To ensure FCAR's long term viability and financial stability, analyze FCAR's assets, particularly those funds currently deposited in savings accounts and investment portfolios, to determine if the assets are being put to their highest and best use

Goal 7. Education: FCAR will enhance membership value by providing high quality education (*Director DeLaquil, Education Committee, Informed Professionals Committee, Commercial Committee*)

- A) Merge Education, Informed Professionals and Commercial Committee into one committee with a single chair, three vice chairs and one monthly meeting**
 - i. President shall call committee chairs to explain the methodology behind this merge and give notice ahead of the 2018-2019 start date
 - ii. President, President-Elect and BOD committee liaison shall meet with current chairs & vice chairs to discuss the implementation of this merge
 - iii. Implementation strategy shall be properly communicated to members and staff

- B) Incorporate NAR® training Modules and Maryland REALTORS® Training Resources into FCAR’s New Member Orientation and training programs for Board of Directors, Committees Chairs & Vice Chairs, Staff and Professional Standards**
 - i. Investigate resources available at NAR® and Maryland Realtors® and the associated costs
 - ii. Find instructors to fulfill commitments as needed and continually seek out qualified new instructors within the approved budget framework
 - iii. Schedule training classes at appropriate times (i.e. beginning of each fiscal year)
 - iv. Communicate the training schedule to members and staff
 - v. Have one BOD Officer or Director be present at each New Member Orientation meeting on a rotating basis

- C) Continue to provide Continuing Education at no additional cost to members within the existing dues structure**
 - i. Identify instructors to fulfill commitments, continue to seek out qualified new instructors and budget accordingly
 - ii. Identify class monitors and create a program to incentivize members to volunteer as monitors within the approved budget framework
 - iii. Schedule classes, add to FCAR’s calendar and communicate/publicize to the members

- D) Offer night & weekend mandatory CE classes each quarter in a variety of educational formats and at non-traditional times**
 - i. Identify instructors to fulfill commitments, continue to seek out qualified new instructors and budget accordingly
 - ii. Identify class monitors and create a program to incentivize members to volunteer as monitors within the approved budget framework
 - iii. Schedule classes, add to FCAR’s calendar and communicate/publicize to the members

E) Provide special programs/classes based upon the needs/desires of the members or in response to “hot topics” in the market place

- i. Assign to the Informed Professionals sub-committee to develop, schedule & promote these programs/classes
- ii. In conjunction with the Technology Committee, utilize all available educational delivery methods (i.e. lunch and learns, webinars, video clips, live stream, etc.)
- iii. Investigate opportunities to access My REALTOR® Party funds to sponsor topic appropriate training (i.e. smart growth, affordable housing, diversity training, etc.)

F) Increase non-dues income by adding additional designation classes

- i. Double the number of annual designation classes from two to four
- ii. Add an annual Associate Broker class
- iii. Market these classes to FCAR members and those in other nearby associations
- iv. Select classes based on member demand, availability of instructors and available calendar/room dates

G) Consistently poll members through surveys, focus groups and personal conversations to determine specific class topics, designations, and hot topics of interest

- i. Implement a model survey for member feedback
- ii. Communicate to and find partnership opportunities with FCAR Broker Members to develop and/or provide continuing education, elective education, designations or hot topic discussions
- iii. Tabulate and report on the findings of all polls and improve the polling process

H) Model Forms Education

- i. Communicate new and updated forms to members, FCAR staff and Broker Member’s staff via monthly membership meetings, email, and the FCAR website
- ii. Add a separate link for new forms on the website
- iii. Ensure staff updates Zipform/E-form libraries as needed

Goal 8. Community Service and Consumer Outreach: FCAR will provide opportunities for members to support local charitable needs via fundraising, outreach and special projects (*Director Friend, Community Service Committee, Equal Opportunity / Cultural Diversity Committee, Communications Director*)

A) FCAR shall promote equal housing opportunity and cultural diversity

- i. Fulfill NAR's recommended activities
- ii. Explore and utilize available grant monies from NAR® and Maryland Realtors®
- iii. Continue to participate and promote the Fair Housing Poster Contest
- iv. Continue to participate in Fair Housing Day activities
- v. Promote association participation to the media

B) FCAR shall actively participate in community service

- i. Explore opportunities to increase fundraising by partnering with YPN and the Community Service Committee and possibly other organizations
- ii. Continue to volunteer with the Soup Kitchen
- iii. Continue to grow the silent auction and other fundraising events
- iv. Utilize available NAR® grants where possible
- v. Promote good deeds of FCAR to the local media

C) FCAR shall support affordable housing initiatives

- i. Continue to participate in homebuyer workshops
- ii. Continue to support and promote available grant programs

Goal 9. Technology: FCAR will utilize innovative technology to benefit the members and staff (*Director Foley, Communications Director*)

A) Implement task management software and/or a shared calendar to be used by FCAR staff to improve efficiency and year to year consistency

- i. Research and test various products
- ii. Purchase/lease chosen tool(s)
- iii. Input monthly and annual tasks into the product chosen to insure FCAR staff is reminded of upcoming responsibilities and is better equipped to meet deadlines

B) Utilize technology, including social media, to support and promote FCAR events

- i. Identify which social media platforms provide the best return in terms of feedback and participation in events
- ii. Explore the use of available ancillary software to distribute postings across multiple social media platforms automatically
- iii. Implement a text message alert system to remind FCAR member of upcoming events 24 hours in advance of the event (allow FCAR members to opt out of this service)

C) Acquire and utilize video resources for education

- i. FCAR staff &/or committee members shall record educational programs supported/sponsored by FCAR
- ii. FCAR staff shall produce a clear set of instructions for the recording process
- iii. Improve utilization of the FCAR YouTube channel by creating more content and promoting it to the members

D) Improve and enhance the FCAR website to become more user-friendly

- i. Explore adoption of a new calendar application.
- ii. Add a public facing section with relevant public content (i.e. Why use a Realtor®?)
- iii. Include helpful links to real estate online tools encourage members to utilize the FCAR web site as their homepage (i.e. SDAT, Zip Forms, Maryland Realtors®, MDLandRec.net, etc.)
- iv. Improve the mobile capability of the FCAR website

E) Track and distribute housing statistics

- i. Develop a system/utilize software that tracks various Frederick County housing statistics
- ii. Upload housing statistics directly to the website and publish them on the website, social media and to the local media (i.e. Frederick News Post)