

Whitman County Strategic Plan with Assigned Tactics for 2018

DRAFT August 2017

Goal 1: Encourage high ethical and professional conduct by our members - Code of Ethics
Assigned: CEO

Objective 1.1: Require new and continuing member to take the Realtor® Code of Ethics training.

Assigned: CEO

Tactic: Require new members to take the Code of Ethics course within 30 days of application.

Tactic: Require continuing members to take the Code of Ethics course every two year cycle.

Tactic: Track Code of Ethics classes in the members NRDS records.

Tactic: Notify members needing the Code of Ethics by March if they need the Code of Ethics this year. Follow up in May, July, Sept and Nov as needed.

Objective 1.2: Maintain a Professional Standards process to enforce the Code of Ethics, Arbitration and Mediation.

Assigned CEO

Tactic: Maintain the contract with Washington Realtors to provide Grievance and Professional Standards services for Ethics, Arbitration, Mediation and Ombudsman.

Tactic: Provide a link on the association website to the NAR website Code of Ethics resources including How to file an Ethics Complaint.

Tactic: Take the Professional Standards Administrator training at AEI at least every other year.

Goal 2: To be an influential voice in the political process - Advocacy

Objective 2.1: RPAC information and collection

Assigned: CEO

Tactic: Include optional "above the line" RPAC investment in the annual membership dues invoice.

Tactic: Send customized RPAC brochures to members with their membership dues invoice.

Tactic: Post RPAC information on the association website

Tactic: Ask members to register to vote at their new member orientation.

Tactic: Distribute Broker Involvement Brochures to all Designated Brokers in January after Legislative days.

Assigned: RPAC Chair/Trustee

Tactic: Have RPAC presentations at membership meetings.

Tactic: Invite an RPAC warrior to speak at the November membership meeting.

Tactic: Promote RPAC successes and Legislative updates at membership meetings

Tactic: Hold an RPAC fundraiser at the May membership meeting.

Tactic: Hold a Phone bank in August or September.

Assigned:GA Chair

Tactic: Hold local Candidate interviews in August. Endorse using RPAC funds if appropriate.

Objective 2.2: Learn about Realtor® candidates and support those that support homeownership and the Realtor® industry.

Assigned: CEO

Tactic: Promote NAR and WR Calls for Action on the association website.

Tactic: Promote NAR and WR Calls for Action via separate email to all Realtor members.

Tactic: Ask members to sign up for the Realtor Action Center app at new member orientation.

Assigned: GA Chair

Tactic: Promote responding to all Realtor Calls for action at Membership meetings

Tactic: Ask members to sign up for the Realtor Action Center app at Membership meetings.

Tactic: Hold Candidate Open House in October in place of the membership meeting.

Tactic: Distribute On Common Ground to all candidates invited to the interviews and Open House, others as desired.

Tactic: Realtor® Voter registration at Sept membership meeting

Assigned MLS Chair:

Tactic: Post all Realtor Calls for Action on the MLS sign in page.

Goal 3: To be a valued partner and contributor in Whitman County - Consumer Outreach

Objective 3.1 Being the Voice for Real Estate

Assigned: Communications Chair

Tactic: Verify the link to the Voice for Real Estate video is active on the Association website.

Tactic: Create a WCAR Facebook page and update with information for members to share (Like HouseLogic's Facebook page and encourage members to share with their clients and customers).

Tactic: Create a consumer section on the association website including tips on home buying, benefits of working with a Realtor. Check content resources at Houselogic.com, realtor.com and nar.realtor.

Objective 3.2: To be involved in our community

Assigned: Communications Chair:

Tactic: Run a radio or print ad from NAR's or WR's Consumer Advertising Campaign in a local media outlet. Use the fill in the blank articles. Share and Promote.

Assigned: Member Services:

Tactic: Promote a Habitat for Humanity project for a build and providing meals in October.

Tactic: Organize a Community Shred Day in April after tax time if feasible. Talk to Alan regarding last year's.

Objective 3.3 To be invested in our community

Assigned: Scholarship Chair

Tactic: Promote the Scholarship to all Whitman Co High Schools starting in Feb.

Assigned: Communications Chair

Tactic: Post the scholarship application on the website.

Tactic: Promote the Scholarship to all Whitman Co High Schools starting in Feb, reminder in March and a press release of the scholarship winner in June to the local newspapers and post on the website.

Assigned: Member Services Chair:

Tactic: Promote a Food Drive to benefit the new school Pantry program in Oct/Nov.

Tactic: Consider inviting the public to the food drive.

Tactic: Organize gift baskets for local charity fundraisers, providing at least 3 in the spring and 3 in the fall.

Tactic: Organize a Thank First Responders Day.

Assigned: Vice President:

Tactic: Invite the person that started the school Pantry program to speak at the Oct/Nov membership meeting.

Objective 3.4 To provide local educational opportunities and Realtor Safety training for our members

Assigned: Education Chair

Tactic: Offer at least two professional development opportunities for members.

Tactic: Promote professional development opportunities on the website, at membership meetings and on facebook.

Tactic: Promote Realtor Safety by showing NAR Realtor Safety videos at membership meetings in Feb and Oct.

Assigned: CEO

Tactic: Promote Realtor Safety by linking NAR Realtor Safety materials online to the association website.

Tactic: Promote REAL, and NAR Leadership class online via email, website and at membership meetings.

Tactic: Attend at least 6 hours of training, i.e. AEI, Summer AE training or online AE classes

Tactic: Promote Leadership development education or training to the elected Realtor(r) leaders. document the training, tools, programs and resources offered.

Goal 4: To meet or exceed the Core Standards

Objective 4.1: To meet and/or exceed the Core Standards not met above - Unification

Assigned CEO

Tactic: Submit bylaws for approval to NAR by Mar 1.

Tactic: Verify MLS Bylaws and Rules are approved annually.

Tactic: File taxes and corporate reports on time.

Tactic: Submit the strategic plan to NAR for approval if changes are made to the advocacy or consumer outreach components.

Tactic: Fill out the Core Compliance tool online and submit the documentation. Submit to the state association no later than Oct 1, once approved by the President and Vice President.

Assigned: Board

Tactic: Confirm the association has Legal Counsel available.

Tactic: Review and discuss the association strat plan, ensuring that it includes the advocacy and consumer outreach components meet the Core Standards and have actionable implementation strategies.

Tactic: Conduct an annual performance review of the chief paid staff. Certify the performance review was conducted.

Tactic: President and Vice President will review and approve the annual Core Compliance Tool prior to submission no later than September 30th.

Goal 5. Use technology to communicate with members

Objective 5.1: Maintain good communication with members including programs, products and services provided at all 3 association levels.

Assigned: CEO and Committee Chairs

Tactic: Maintain the association website, providing links to Professional Standards and Arbitration filing processes and to programs, products and services provided by the state and national associations.

Tactic: Use phone, email and the website to communicate with members.

Goal 6. Assure the association is secure financially - Financial Solvency

Objective 6.1: Maintain and keep the association secure financially.

Assigned: CEO

Tactic: Develop financial policies to ensure the fiscal integrity of the WCAR financial operations as required by the state association.

Tactic: Participate and facilitate in an annual review of the books or audit.

Assigned: Board

Tactic: Adopt financial policies to ensure the fiscal integrity of the WCAR financial operations as required by the state association.

Tactic: Be involved in the budget process.

Tactic: Review the results of the annual review of the books or audit.

Objective 6.2: Budget for Programs and Services

Assigned: Budget Committee:

Tactic: Start the Budget process in June or July.

Assigned: Committee Chairs

Tactic: Report budget needs to the Board by May for the following year.

Tactic: Report activities to the Board monthly, or quarterly if more appropriate.

Assigned: Board

Tactic: Review the Strategic Plan progress monthly.

Tactic: Attend the budget meetings with budget requests from Committee Chairs.

Tactic: Approve Budget at the July or August Executive meeting.

Tactic: Present the budget to the membership for a vote at the Sept Lunch and Learn.

Assigned: CEO

Tactic: Provide support for the budget process.

Tactic: Distribute budget for approval/vote as prescribed in the bylaws.