



Strategic Plan (FINAL)

***Created at Retreat Held:
July 14, 2020***

Plan Prepared For:

***Carteret County
Association of REALTORS®
121 N. 28th Street
Morehead City, NC 28557***

Strategic Planning Session Facilitated By:

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Strategic Plan Certification (This is a DRAFT and must be finalized prior to approval of CCAR)

This Strategic Plan includes measuring success against CCAR's prior plan, overall initiatives for 2020 and beyond. It also includes items covered in leadership training, the role of our Association as it relates to the state and National levels, with an overview of all six Core Standards.

This plan has been officially adopted by the Board of Directors of the Carteret County Association of REALTORS® (CCAR). It will be reviewed and acted upon consistently by our leadership moving forward.

Board of Directors approval:

Date: _____

President's signature

Date: _____

President Elect's signature

Date: _____

Association Executive's signature

Date: _____

Facilitated By: Daryl L. Braham
iON Leadership Consulting

Date: July 2020

Vision

CCAR currently does not have a vision statement, and this is covered in our initiatives

Mission

Below is the current mission statement of CCAR and is to be reviewed as part of our initiatives.

CCAR is an organization of real estate professionals, created to promote high standards and to enhance the professional and personal growth of its membership through information, education, and community involvement. CCAR helps our members be successful, supports our communities and protects property rights for everyone.

We are focusing on three major categories for clarity. This does not take away from the core functions of the Association, only focus's leadership now and into the future to get done what the group felt was most important first. Prioritize three (3) at a time, get momentum, repeat.

Strategic Objective #1: Purpose-Our WHY and How We Deliver

- Immediately begin the process to implement an Executive Committee role of the BOD. Exec is made up of elected officers and the CEO. Exec. Team do not make decisions necessarily on its own, however, drives the agenda ahead of BOD meetings to focus forward instead of administratively. Details at nar.realtor
- Immediately begin the process of creating vice chair roles for committees to allow for better training, better continuity, and better flow of activities.
- Re-evaluate all committees and determine the best way to get results. Some committees may no longer be needed or can be substituted with work groups of advisory groups, short- or medium-term limited scope activities.
- Update our committee volunteer calls for action to explain the Why to possible new volunteers, use the success from past volunteers to entice why others should get involved.
- Re-develop our mission statement. Our mission IS our purpose, it explains what you focus on doing and for whom you do it. Be clear, short, simple. Something that leadership now and in the future can grab on to and say "that is why we exist" as an Association. Visit our Vision, but get our Mission done first.
- Implement a focused training program, ongoing. This should be geared to all current and future leaders. Include training on what it means to be a leader, how to run a meeting, the roles of committees and the BOD/Exec, and more. Remember Duke-if they only practiced once or twice a year, could they ever be a winning team? Same goes for volunteer leadership, our training is our practice and the biproduct is more successful members because they were involved.

- Add value savings for the members – increase business tools & resources

Annually there are items that the Association must complete to be successful for its members. Including these in our plan ensures they are seen and are part of the Boards' Goals each year.

- Understand how the board is functioning, from the top roles to committee and to volunteers-do a real world and true assessment and adjust when and where needed.
- Ensure all members of the BOD are held accountable to reviewing and understanding the Bylaws, policies, and finances of the Association annually.
- Communicate succinct messaging to the general membership, starting with the BIC's.
- Have separate on-boarding training for new leadership so their understanding and expectations are the focus, rather than during their first board meeting.
- Determine expectations and define not just in writing but through training as to what is expected/required of leadership, directors, chairs, and vice chairs. Be clear on what they are getting in to, why it matters, and what is expected.
- Have twice annually accountability checkups as a listen and learn opportunity for leadership.
- Provide for specific communication tools between staff for committees and leadership to insure proper communication at all levels.
- Ensure all leadership roles understand what they will be held accountable for creating a culture of accountability, putting specific standards in place, including to-from committee leadership to the board.
- Show off the unification efforts of the board, and truly promote, continuously and at every meeting, outreach, program, the focus on a safe place for members to lead from.
- Define expectations and goals by specific areas annually and do a "mid cycle" checkup midyear.
- Define priorities and gain agreement, THEN set expectations, and hold members accountable.
- Understand WHY of leadership, staff, BIC's, and membership-focus on what matters.

Strategic Objective #2: Communication-What and How We Do It

Throughout the event it became abundantly clear that communication, or lack thereof, is the single biggest opportunity for CCAR, however, you cannot begin effectively communicating until our purpose is clear, thus, this is item #2. Communication within leadership, to/from committees, to/ from members, to/from the state, and all aspects of all functions of the board and the members they serve.

There is a disconnect between the great work the Association does and the willingness of others to get involved combined with the lack of clarity around who does what, why, and how. Several specific areas were highlighted to be focused on for now and into the future, including:

- Expand opportunities created by the COVID crisis to create virtual meetings, connections, and reach out with new methods to attract a broader audience.
- Recognize that many CCAR members have no idea the value the Association brings and continuously find ways to deliver clear messaging to them. A byproduct of this improved messaging and communication will be improved involvement. Define, engage, measure.
- Revamp new member orientation-do not tweak what you do now, start with a clean slate and determine based on today, new members needs today, technology changes today, what should new member orientation look like, and implement a new strategy for better on-boarding.
- Communication extends to the opportunities, knowledge and value created by members in leadership as to why they did this, what they got from it, and how it impacted them. Ensure a way to capture and cultivate those stories for future leaders.
- Determine how an ongoing communication channel can be established for active engagement not simply emails. Show the value the Association brings. This is not to be simply put on to the role of the CEO to get done. This requires a determined, focused approach. Do not expect members to come to us, go to them.
- Be consistent, implement an on-going program and stick with it-this won't happen quickly.
- As we know, members rarely read association communications, so focus on deliverables that will get them engaged, including:
 - Email-What is our board of directors doing right now? —possible share or provide a link to additional information, upcoming meetings, promotional materials, and other info helpful to membership, especially to broker members
 - Improve training, materials, and true “what we do for you” for all new members on going
 - **Who we are:** The Board of Directors made up of volunteer REALTORS® elected by our members.
 - **What we do:** We provide tools to be successful in our members’ business – MLS, standardized forms, lockbox, education/training, advocacy, and other PR to promote members, REALTORS, and home ownership.
- Fully review our website and make sure any opportunity for engagement is taken into consideration-look at it from a member perspective-does it hit the mark?
- Increase research of membership wants and needs to better understand how to deliver.

- Deliberately self-promote, be a resource for success. Watch for every opportunity to promote wins of the association, where we were, where we are now, where we are going. Watch for local, state, or national opportunities and promote those WINS clearly and concisely to membership.
- The promotion of a sense of community, collaboration and cooperation-within CCAR leadership, membership, and the community.
- A resource for success-create a where we were and where we are now, overview to show members the success of CCAR-show the past few years of what our wins were.

Ideas on leadership communication:

- Encourage current volunteers at all levels to identify one person for direct contact from leadership of the association to get involved. Communicate one-on-one, not in mass, and slowly chip away at the perception.
- Share details on all roles and educate leadership on who is doing what and why. Bring in all next year leaders early in the process- 3rd quarter of year before they start, along with implementing all leadership meetings including chairs, vice chairs, etc. Be clear on what's working and what's not, and always create clarity on how anything is getting done.
- Implement a more regular "all" leadership meeting, bring in chairs and vice chairs, and discuss among leaders the state of the Association, what's working and what's not and allow that communication to flow openly from leadership to membership.
- Clarify role of staff and committee work and insure proper education to chairs and vice chairs as to roles and responsibilities.

Annually there are items that the Association must complete to be successful for its members. Including these in our plan ensures they are seen and are part of the Boards' Goals each year.

- What does the board do, why, and what are the results?
- When the board or leadership has a win, know why it matters and share that knowledge among the entirety of leadership as well as with the membership.
- Involvement is an opportunity, not simply a seat to fill-change the approach of how to attract willing participants, and communicate throughout the year, not just when volunteers are needed.
- Leadership must keep track of its activities and accomplishments and constantly communicate that out to each other and to membership. This is an on-going and continuous requirement.
- Understand our mission, clarify our values, then communicate it aggressively, concisely, and consistently to our members.

- Start at the beginning, deal with the issues in front of you in a unified fashion, ensure opportunities to hear and be heard by our broker members.
 - Continue to build on our BIC communication platform, focus on face to face where possible and applicable one BIC at a time. This is an ongoing need.
 - Share the legal and professional tools and protections provided by NAR and NCAR.
 - Continuous and on-going PUSH messaging across various formats to all members.
 - Implement continuous and consistent short surveys to hear from members as to how you can help them. Constantly be asking better questions.
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Strategic Objective #3: Advocacy

The core foundation of the benefit of our Association is its ability to advocate locally, within the state, and to promote national advocacy for our membership. Advocating does not simply mean raising money for RPAC, it includes various areas of activity, including:

- Continue our exemplary focus on RPAC with our current 70% participation and promote this fact as a huge win for the Association and its members.
- Educate the leadership and RPAC investors on the NAR sanctioned awards-Triple Crown and President's Cup. Create a simple way to track our progress towards these goals so you can focus on achieving then celebrate the win, together.
- Identify opportunities to raise levels from those investing. Try to get those at \$25 to \$50, to \$100. Try to get those at \$500 to a major level, etc.
- Track goals working with NAR to identify opportunities to increase major investor levels.
- Work with all the tools found under NAR's Realtor Party including seeking grants, support, speakers, education, tools, and materials to help educate members.
- Engage members in the political arena-identify those that have an aptitude for politics and connect them to legislative opportunities and influence at our local and state level.
- Be a visible proponent of land ownership rights and seek opportunities to get public about our messaging with local challenges and within the state.
- Promote community outreach to consumers to show the value of the Association within the community. Without promoting what you do, members will never understand the value their membership brings. This must be on going and promotes the value of being a Realtor to members and to the community.
- Educate in a way that focuses on the value this activity means to the average member.
- Seek out best practices to better control data flow.

- Recognize Major Investors in a way to encourage others to raise their investment levels.

Annually there are items that the Association must complete to be successful for its members. Including these in our plan ensures they are seen and are part of the Boards' Goals each year.

- Focus on goals annually to raise this bar. Identify several members to target, not simply a percentage, make the goal easy to track and easy to hit.
 - Enhance our relationship with the state and be a proactive member of the calls to action, utilizing the state contact information whenever possible.
 - Continuous and on-going PUSH messaging across various formats to all members.
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Strategic Ideas also covered:

- Survey members and leadership to better understand the needs and wants of both
 - Better engage the state Association to be more involved in our local board-use their resources, but go get them, they won't bring to you
 - Create and promote a "what's in it for me" format of/for our members (WiiFM)
 - Ensure the leadership team is more involved on a "personal" level with members
 - DON'T try to accomplish too much in any one year
 - Three Truths-All new ideas will be 1-laughed at, 2-violently opposed, then, 3-taken as self-evident. Remember 99% of all new ideas die at stage 2, don't let our best ideas die
 - Ensure leadership knows the roles of the committees, never assume
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NAR Core Standard Objectives:

We also did an overview of the NAR required Core Standards. Leadership was shown how the staff and leadership of the CEO simply ensures the following requirements are met:

1. Advocacy
 - a. Above the line dues billing
 - b. A leader and communicate the value of RPAC
 - c. Promote participation in NAR and NCAR Calls for Action
 - d. Engage in statewide calls for action when applicable
 - e. Provide a method for advocacy engagement for our Association
2. Consumer Outreach (must perform 4 of 4)
 - a. Continue to enhance opportunities as the Voice for Real Estate
 - b. Promote our community involvement activities each year
 - c. Engage the public in legislative issues
 - d. Expand promotion of our role in community programs including fundraising
3. Code of Ethics
 - a. Provide new and continuing education classes on the Code of Ethics
 - b. Have a viable Professional Standards process
 - c. Include a link on our website to NAR Code of Ethics
 - d. Understand and provide mediation and ombudsman services
4. Unification Efforts
 - a. Our bylaws are reviewed every year
 - b. Provide access to legal counsel
 - c. Policies and procedures in place including filings as required by state laws
 - d. Strategic and Business plans include an advocacy component
 - e. Association Executive completes more than 6 hours of CE/year
5. Technology
 - a. Have an interactive website
 - b. Have multiple Association e-mail accounts and access
6. Financial Solvency
 - a. Have strong policies in place to ensure integrity of our operations
 - b. Do complete an annual review