



2018-2020 Colorado Association of REALTORS® (CAR) Strategic Plan

Prepared for the Colorado Association of REALTORS®

September 2017

Table of Contents

- I. Executive Summary.....3
- II. Retreat Agenda and Retreat Participants.....4
- III. CAR Mission, Priority Results, and Value Proposition.....6
- IV. 2018-2020 Strategic Plan.....8

Executive Summary

The 2017 and 2018 Leadership Council of the Colorado Association of REALTORS® (CAR) held a Strategic Planning Retreat, facilitated by Tom Rossiter, on June 13, 2017. The Councils conducted an environmental scan to identify key issues facing the organization and industry. It also examined the organization's current initiatives and programs in order to identify the association's strengths on which to capitalize and areas for improvement.

Over the one day session, the group confirmed that the current five strategic objectives remain true to CARs Mission, Ends Statements and Value Proposition. Those objectives are Consumer Awareness, Communications, Professional Development, Board Relations, and Government Affairs.

In addition to an emphasis being placed on improved communication the Councils added two new objectives Branding and Leadership. These seven strategic objectives will be strategically addressed over the next three years to ensure the relevancy, vitality and longevity of the association.

The strategic objectives and related strategies are detailed within the 2018-2020 Colorado Association of REALTORS® strategic plan.

Agenda and Participants

Strategic Planning Session June 13, 2017 One Ski Hill, Breckenridge, Colorado Agenda

Tuesday, June 13, 2017 – Both incoming and outgoing Leadership Councils

7:00 – 8:45 AM	Breakfast
9:00 – 12:00 PM	Strategic Planning- Tom Rossiter
12:00 – 1:00 PM	Lunch
1:00 – 5:00 PM	Conclusion of Strategic Planning- Tom Rossiter
5:30- 9:00 PM	Cooking class team building and dinner (incoming only)

Wednesday, June 14, 2017 Incoming Leadership Council only

7:00 – 8:30 AM	Breakfast
8:30am – 12:00 PM	Training session <ul style="list-style-type: none">• 2018 CAR Chair Initiatives- Ann Hayes• How CAR Operates- Policy Governance- Ann Hayes and Tyrone Adams<ul style="list-style-type: none">○ Synergy between CAR Leadership and CAR Staff○ Review and discussion of CAR Leadership Roles○ NAR and CAR Meetings○ Leadership Budgets and Finances○ Member Fuse• What's in CAR's Value Proposition and Why it's Important<ul style="list-style-type: none">○ Government Affairs- Ted Leighty○ Legal and Risk Information- Scott Peterson

- Research- Lisa Hansmeier
- Professional Development- Jamie Richards
- Technology- Jonathan Griggs
- Closing Remarks- Ann Hayes

12:00 PM

Adjourn

Participants:

Mark Trenka- Chair, Ann Hayes-Chair-Elect, Alan Lovitt- Immediate Past-Chair, Gary Bauer – Treasurer, Dennis Johnson-Appointed Past Chair, Scott Matthias-2018 Appointed Past Chair, Francie Martinez – Chair of Member Services, Sunny Banka- 2018 Chair of Member Services, Julie Retzlaff – Chair of Board Services, Jarrod Nixon- 2018 Board Services Chair, Dave Kupernik – Chair of Government Affairs, Ron Thorne – Metro District Chair, Dale Carroll- 2018 Metro District Chair, Paul Hunter- Northeast District Chair, Lisa Wade- 2018 Northeast District Chair, Marjorie Genova – Northwest District Chair, Debbie Laity- 2018 Northwest District, Donna Majors – Southeast District Chair, Cris Salerno- 2018 Southeast District Chair, Clint Skutchan– AE Representative, Tyrone Adams– President/CEO, Janna Burton – Executive Assistant, Jonathan Griggs- Director of Technology, Lisa Hansmeier – Vice President of Member Services, Ted Leighty – Vice President of Government Affairs, Scott Peterson- General Counsel, Jamie Richards– Vice President of Professional Development, and Tom Rossiter – Facilitator.

Mission, Priority Results, and Value Proposition

CAR Mission:

Protecting the Real Estate Industry and Making REALTORS® More Successful

Priority Results:

- 1. The public values, respects and uses REALTORS®.*
- 2. Local associations/boards have support and quality services.*
- 3. Ethical standards are enforced.*
- 4. Public policy/regulations are favorable to the real estate industry.*
- 5. Members are knowledgeable of market trends and data, neighborhood and economic statistics.*
- 6. Members are knowledgeable about exclusive benefits.*

Value Proposition:

Market Trends and Data: CAR provides a variety of neighborhood and economic statistics. Information to make you more confident and productive in the sales process.

Political Decisions at the Capitol: Actions that protect real estate and build a healthier market for members, buyers and sellers.

Legal Trends and Information: Helping you lower your risk to ensure successful transactions and skilled business practices.

KNOWLEDGE
Happens Here
coloradoREALTORS.com

COLORADO ASSOCIATION OF REALTORS® 2018-2020 STRATEGIC PLAN

Strategic Area #1: Consumer Awareness

Purpose: CAR promotes the value of using a REALTOR® and their contributions to the vitality of the communities they serve.

Strategic Objective 1A: The public recognizes the REALTOR® organizations in the state as the singular voice for real estate in Colorado.

Strategy 1A.1: CAR has visible consumer awareness campaign.

Task 1A.1.a: Utilize resources available through NAR (e.g. Consumer Advertising Campaign).

Task 1A.1.b: Develop a multi-faceted consumer awareness campaign.

Task 1A.1.c: Train and assist local associations with implementing effective consumer campaigns.

Completion Date: ongoing

Strategy 1A.2: CAR creates and delivers Colorado real estate news and information.

Task 1A.2.a: Promote and continually improves on monthly market reports (10K Market Reports).

Task 1A.2.b: Continue to deliver timely and original real estate news through the Home Connection.

Task 1A.2.c: Provide original real estate content to the public through a variety of delivery methods (website, media outlets, webcasts, social media, and local associations).

Completion Date: ongoing

Strategy 1A.3: CAR utilizes Search Engine Optimization and other marketing strategies to enhance visibility of REALTORS® in Colorado.

Task 1A.3.a: Maximize the Google Grant to expand CARs digital reach.

Completion Date: ongoing

Strategic Objective 1B: Public recognizes the importance of REALTORS® and the value of their services.

Strategy 1B.1: Public perceives REALTORS® as advocates for private property rights.

Task 1B.1.a: Develop issues oriented consumer outreach program.

Task 1B.1.b: Provide REALTORS® with materials relating to issues outreach.

Task 1B.1.c: Engage the public in legislative and policy issues affecting private property rights and real estate.

Completion Date: ongoing

Strategy 1B.2: Public understands the value of hiring a REALTOR®

Task 1B.2.a: Implement a multi-media campaign to illustrate the value of working with a REALTOR®

Strategy 1B.3: Ensure the public is aware of REALTOR® contributions to the community.

Task 1B.3.a: Publicize CAR event participation and charitable donations.

Task 1B.3.b: Expand charitable efforts of CAR.

Task 1B.3.c: Encourage local associations to publicize local participation locally and with CAR

Task 1B.3.d: Post association and member community involvement on social media and CAR website

Completion Date: April 2018

Strategic Area #2: Communications

Purpose: CAR provides reliable and accurate real estate information that helps our members in their business and assists consumers in making informed real estate decisions.

Strategic Objective 2A: CAR provides valuable and focused information in order for members and local associations to demonstrate their value.

Strategy 2A.1: CAR promotes the value proposition.

Task 2A.1.a: Develop a comprehensive promotional campaign.

Task 2A.1.b: Educate local associations on CAR value proposition.

Completion Date: April 2018

Strategy 2A.2: CAR members can communicate the value of being a REALTOR®

Task 2A.2.a: Enhance the Member Awareness Campaign.

Completion Date: ongoing

Strategy 2A.3: CAR encourages local associations to create and share their value proposition.

Task 2A.3.a: Assist local associations on developing and promoting their value proposition

Completion Date: ongoing

Strategy 2A.4: CAR is the source for members for reliable and accurate real estate industry data.

Task 2A.4.a: Gather and compile accurate, reliable and timely data and information.

Task 2A.4.b: Communicate directly to the member, issues important to their profession.

Completion Date: ongoing

Strategic Objective 2B: CAR delivers member and consumer communications through numerous communication channels.

Strategy 2B.1: CAR effectively communicates with members and the public through a comprehensive communication strategy.

Task 2B.1.a: Research different communication methods to enhance efforts.

Task 2B.1.b: Develop communication strategy and measure results.

Completion Date: ongoing

Strategy 2B.3: CAR offers a Board Outreach program to provide opportunities to engage local associations in CAR communication efforts.

Task 2B.3.a: Develop communication program with Board Services division.

Task 2B.3.b: Engage local AEs in the CAR communication efforts.

Task 2B.3.c: Build a communication matrix of local associations

Completion Date: ongoing

Strategic Area #3: Professional Development

Purpose: Colorado REALTORS® personify professionalism.

Strategic Objective 3A: All real estate business specialties are supported by CAR.

Strategy 3A.1: CAR supports all business specialties by delivering and a wide variety of educational programs.

Task 3A.1.a: Identify real estate business specialties among its members.

Task 3A.1.b: Create a database of all member specialties.

Task 3A.1.c: Provide educational programs through accessible and user-friendly delivery platforms (i.e.: in-person, live stream, video content).

Task 3A.1.d: Assist members in utilizing resources of societies, councils and other resources.

Completion Date: January 2019

Strategic Objective 3B: REALTORS® practice a high level of professionalism through their commitment and compliance to the Code of Ethics.

Strategy 3B.1: CAR provides access to NAR and CAR tools for Code of Ethics training.

Task 3B.1.a: Provide webinars and assist local associations with Code of Ethics and enforcement training.

Completion Date: ongoing

Strategy 3B.2: CAR ensures that all local associations have the ability to enforce the Code of Ethics and provides conflict dispute resolution services.

Task 3B.1.a: Educate local associations about the enforcement process.

Task 3B.1.b: Provide training for Grievance, Ethics and Arbitration Hearings, Ombudsman and Mediation.

Completion Date: ongoing

Strategic Objective 3C: Encourage more REALTORS® to become engaged in CAR.

Strategy 3C.1: CAR strategically creates opportunities for Colorado REALTORS® to increase their level of engagement in CAR.

Task 3C.1.a Create a tier for REALTORS® who are dedicated to a higher level of engagement in CAR.

Completion Date: October 2019

Strategic Area #4: Board Relations

Purpose: CAR has strong relationships of trust and speaks with one collaborative voice.

Strategic Objective 4A: Assist local associations to identify advantages and implementation of shared efforts.

Strategy 4A.1: CAR communicates the advantages of shared efforts.

Task 4A.1.a: Develop a list of advantages for local associations.

Task 4A.1.b: Develop outreach plan to education local associations.

Task 4A.1.c: Design a customized plan of action with local associations to identify and link potential business partners.

Completion Date: October 2018

Strategic Objective 4B: As MLS's continue to consolidate local associations rely on CAR for guidance to manage the fiscal impact.

Strategy 4B.1: CAR educates local leadership about sound fiscal management practices.

Task 4B.1.a: Develop program to provide fiscal training resources to local associations.

Task 4B.1.b: Assist local associations in identifying potential non-dues revenue sources.

Task 4B.1.c: Demonstrate to local associations the pros, cons and monetary benefits of unification.

Completion Date: August Annually

Strategic Objective 4C: CAR provides products, services and programs to local associations.

Strategy 4C.1: CAR provides relevant and current products, services and programs to support success of local associations.

Task 4C.1.a: Develop products, services and programs based on the needs of identified geographic and individual market areas.

Completion Date: ongoing

Strategy 4C.2: CAR encourages locals to emphasize CAR's value proposition.

Task 4C.2.a: Encourage all local associations to actively promote CAR value proposition along with local value proposition.

Task 4C.2.b: Provide all necessary tools to local associations for promotion of CAR value proposition.

Completion Date: ongoing

Strategy 4C.3: CAR serves as a wholesaler and retailer to local association to provide products, services and programs.

Task 4C.3.a: Identify needs of locals to best deliver products, services and programs.

Completion Date: October 2018

Strategy 4C.4: CAR supports local efforts to meet the NAR Core Standards annually.

Task 4C.4.a: Communicate with local boards on Core Standards requirements and deadlines.

Task 4C.4.b: Maintain a program to support locals with NAR Core Standards compliance.

Completion Date: ongoing

Strategic Objective 4D: CAR is committed to training local associations on the mechanics of Policy Governance.

Strategy 4D.1: CAR demonstrates the benefits and efficiencies of Policy Governance.

Task 4D.1.a: Educate local associations on advantages of policy governance for an organization.

Completion Date: May Annually

Strategy 4D.2: CAR trains local associations to understand the roles, responsibilities and accountabilities in Policy Governance.

Task 4D.2.a: Develop a training program and deliver through multiple methods.

Completion Date: May Annually

Strategic Area #5: Government Affairs

Purpose: CAR is the voice for private property rights and real estate issues

Strategic Objective 5A: CAR members understand and support the REALTOR® Party.

Strategy 5A.1: CAR members understand the importance of their voluntary financial support of the REALTOR® Party, are motivated to participate in the advocacy process and see the value in participation.

Task 5A.1.a: Continue to require local associations to bill the RPAC Fair Share amount above the line on the dues invoice.

Task 5A.1.b: Provide information to members on how advocacy impacts their business, communities and their clients.

Completion Date: ongoing

Strategy 5A.2 CAR members understand how the candidate selection and endorsement process works, the parameters involved, and are knowledgeable on the RPAC funds disbursement process for state, local and federal candidates and issues.

Task 5A.2.a: Communicate to members about the endorsement and disbursement process through various methods.

Completion Date: ongoing

Strategic Objective 5B: CAR impacts REALTOR® Party issues by engaging the public.

Strategy 5B.1: CAR has a public awareness campaign involving various media, public forums, REALTOR® involvement with clients, and community leaders.

Task 5B.1.a: Create a task force to identify the goals, metrics and means to achieve.

Task 5B.1.b: Provide local boards with the ready-made tools for a public advocacy engagement programs.

Completion Date: ongoing

Strategy 5B.2: CAR has a consumer Calls for Action program.

Task 5B.2.a: Create a consumer database to activate the public to advocate on behalf or against policy decisions affecting private property rights.

Completion Date: February 2018

Strategic Objective 5C: CAR has a direct and positive influence on public policy, elections and the legislative process through advocacy efforts.

Strategy 5C.1: CAR is the first and desired point of contact for elected officials and their staff, the media and persons of influence in the state.

Task 5C.1.a: Cultivate relationships by providing valuable and relevant resources.

Task 5C.1.b: Develop communication plan to guarantee constant outreach.

Completion Date: ongoing

Strategy 5C.2 CAR is a key player in the political process, influencing candidate selection and election results as well as exercising a direct voice in policy decisions.

Task 5C.2.a: Identify strategic alliances and REALTOR® champions to achieve favorable election results and policy outcomes.

Completion Date: ongoing

Strategy 5C.3: CAR demonstrates its grassroots influence by maintaining an asset database of member influence.

Task 5C.3.a: Create an asset database of key community relationships within its membership.

Completion Date: ongoing

Strategic Area #6: Governance

Purpose: Policy Governance is in place to ensure accomplishment of Ends Statements and operational and fiscal excellence.

Strategic Objective 6A: CAR Leadership Council, Board of Directors and CEO operate under the policies set forth in the Policy Governance Manual and Policy Statements.

Strategy 6A.1: The CAR Policy Governance manual is current and complete to ensure operational and financial excellence.

Task 6A.1.a: Policy Manual and appendices are reviewed every two years.

Task 6A.1.b: Board of Directors is properly noticed of changes.

Task 6A.1.c: Policy Governance manual changes are approved by the Board of Directors.

Task 6A.1.d: Board of Directors is provided copies of the current manual.

Completion Date: ongoing

Strategy 6A.2: CAR's financial policies guarantee strong financial safeguards to protect the investment of its members.

Task 6A.2.a: Maintain and adhere to the Executive Limitations and financial policies set forth in the Policy Governance Manual.

Task 6A.2.b: Maintain and adhere to the established financial review procedures established by the organization.

Task 6A.2.c: Maintain and adhere to the asset protection policies.

Task 6A.2.d: Review policies annual to ensure all financial safeguards are in place and meet or exceed the minimum requirements of the CAR core standards.

Completion Date: ongoing

Strategy Objective 7A: CAR ensures there is a volunteer leadership pipeline to safeguard the future of CAR.

Strategy 7A.1.a: Create a program to develop leaders at all levels in the Association

Task 7A.1a: Create a matrix of CAR Leadership positions proficiencies for roles

Task 7A.1.b: Equip and train CAR leaders to be effective annually

Task 7A.1.c: Promote the benefits and opportunities of becoming a CAR Leader

Completion Date: January 2019