

2020-2023

Strategic Plan



Facilitator: Merri Jo Cowen

Mackay Gardens – Lake Alfred

9/20/2019

Vision Statement:

EPCAR is recognized as the voice of real estate for ethical, professional and technologically advanced real estate services as well as being the public advocate for its members and the consumers they serve

Mission:

EPCAR promotes ethical behavior, provides quality education to members & protects private property rights.

Introduction

The 2020-2023 Strategic Planning session for the East Polk County Association of REALTORS was held on September 20, 2019 at Mackay Gardens in Lake Alfred. The planning session was facilitated by Merri Jo Cowen, CEO of Stellar MLS with 21 attendees including EPCAR officers and directors, members at large, business partners and Association staff.

Review of the 2016-2019 Strategic Plan

CEO Marisol Correa-Barbosa reviewed the current three-year Strategic Plan, highlighting successes and areas of continued focus. Those milestones met include:

1. RPAC Successes: Recognized for two years in a row by both FR and NAR for Triple Crown achievement; 102.4% of goal achieved so far for 2019; MLS billing added 167 additional investors; overall participation in 2019 is 46%.
2. Association Structure: Increased interest in serving in volunteer leadership and added candidate interviews in 2019; overall membership increased by 13% in 2019; NAR Core Standards certification achieved every year since inception.
3. Community Events Increased: Association participation in community events has increased significantly, including the Lake Wales Run, Haines City Shoe Collection, Golf Tournament, Bowling-Feed Hunger Sponsor, Soccer field banner sponsor and more.
4. Community Awareness: Partnership with The Sun has helped promote Realtors in the community and the value of using a Realtor in general through spotlights on scholarship winners, award winners, golf tournament and the Benefit Gala, a new event for 2019.
5. Culture Enrichment: Created the Global/YP Council to focus in those areas. Council hosted several Lunch & Learns, Diversity Certification, attendance at Toronto Annual Realtor Quest for two years and two members attended Dubai trade mission.

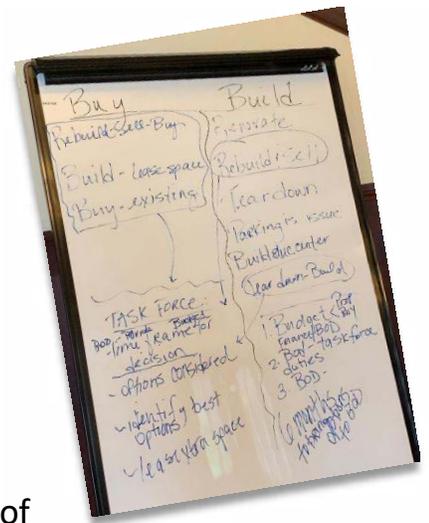
Overview by 2019 EPCAR President Lamanda Jones

President Lamanda Jones added her remarks and appreciation for the collaborative efforts over the last several years to build a strong and vital Association. She brought forward the current focus of the Board of Directors: the EPCAR facility. Several years ago, there was a similar discussion resulting in a remodel of the facility to better accommodate the needs of the membership. With the continuing growth of the membership, the Board of Directors has concluded that it is time to look for new options – to buy or build a new facility that can meet the space and parking needs for the multitude of activities and meetings held at the Association office.

Hot Topic: Buy, Build or?

In response to President Lamanda’s request for feedback, the discussion shifted focus to the future of the Association’s facility – buy, build, remodel, etc. The consensus of the group was to buy, build or lease in a new location due to the lack of parking available at the current facility. The options most widely discussed:

- Buy an existing property including additional space to lease as a revenue generator
- Buy land and build a new facility including additional space to lease as a revenue generator
- Remodel or tear down/rebuild the existing facility and then sell it



The Recommendation: The group recommends that the Board of Directors form a Task Force to review the various options, work with the Finance Committee and Board of Directors to determine the funding parameters and identify the best options. The group recommended an aggressive timeline, with initial report to the Board of Directors by June of 2020. Upon review and recommendation from the Board, the task force would then proceed into the planning with a final report by year end 2020.

Date	Task
December 2019 (prior to Installation)	Board of Directors form the Building Task Force
June 2020	Task Force reports back to the Board of Directors with options for current and new buildings – including locations, construction quotes and income generating uses of new facility.
End of Year 2020	Task Force completion of studies to analyze viability of the proposed options previously identified; Board of Directors selects an option.
Early 2021	Plans put into action for new EPCAR home

EPCAR and NAR Core Standards

A key component to the success of a Realtor Association is measured annually by the National Association of REALTORS requirement to meet its established core standards. CEO Marisol reported successful accreditation for each year that the requirement has been in place. The goals of the 2016-19 Strategic Plan are formed around these key areas – continuing to focus on the same areas with updated goals will also be the foundation for the next steps in the planning with a focus on **Professional Development, Advocacy, Consumer Outreach, Communications, Association Structure and Operations, and Culture Enrichment**. Note the tie in with the expectations for meeting the Association Core Standards requirement.

Local, state, and territorial associations of REALTORS®, as a condition of membership in the National Association of REALTORS®, must meet NAR's **Organizational Alignment Core Standards**, a set of requirements that fall into six categories:

1. Code of Ethics
2. Advocacy
3. Consumer Outreach
4. Unification Efforts and Support of the REALTOR® Organization
5. Technology
6. Financial Solvency



REALTOR® associations must **certify compliance** with the standards each subsequent year or be subject to revocation of their charter.

Diving into the Details – the Six Core Goals

Each of the six existing goals were reviewed in detail, with each table group given the assignment of recommending tasks in the 2016-2019 plan that have been completed or are now fully integrated into the functions of the Association, recommending those that should continue and be built upon and to suggest new tasks be included in the new plan. The six goals are:

Goal #1: PROFESSIONAL DEVELOPMENT: Provide timely, state-of-the-art, cost-effective, interactive and unique education which consistently meets the present and future needs of the membership, including alternate delivery methods to increase the member's profitability.

Goal #2: ADVOCACY: Enhance and expand EPCAR's advocacy programs while maintaining a focus on local politics. Engage local and state legislative and regulatory bodies to ensure the quality and maintenance of the environment needed for housing and preservation of private property rights, strong business economies, and quality of life.

Goal #3: OUTREACH: Promote and market our community as a quality place to live and work, and position Realtors as valued members of the community in the eyes of the consumer.

Goal #4: COMMUNICATIONS: EPCAR shall seamlessly communicate with all stakeholders by accessing and utilizing diverse communication vehicles to facilitate a high level of interactivity throughout the Association.

Goal #5: ASSOCIATION STRUCTURE & OPERATIONS: Provide an effective, flexible and participatory organization to meet the needs of the members; build motivated and engaged leadership and staff who are responsive to the members.

Goal #6: CULTURE ENRICHMENT: Strive to create an enriched culture and experience for all members to demonstrate how membership in EPCAR results in a successful real estate career.

Following the table exercises, each table presented their recommendations and ideas for new initiatives/tasks. To prioritize the new task suggestions, each attendee was invited to select their “Top 8” of the 16 noted below. The recommendations for inclusion in the 2020-2023 Strategic plan were, in the order of votes:

- #1 Establish a Building Task Force (17 votes)
- #2 Build a Mobile App for Members (17 votes)
- #3 Build a Roadmap to Association Leadership (14 votes)
- #4 Video! Video! Video! Use Video Everywhere! (13 votes)
- #5 Member Engagement in Social Media with Public (11 votes)
- #6 Offer “After Hours” Classes (11 votes)
- #7 Business Partner Involvement in RPAC (10 votes)
- #8 Create a Business Partner Mentor Program (10 votes)
- #9 New Member Welcome Drip Campaign (9 votes)
- #10 Create Opportunities for Member Recognition – designations/awards (8 votes)
- #11 Conduct “Roundtable” Education Classes (8 votes)
- #12 Create a Video Library as a Resource for Members (7 votes)
- #13 Separate the Marketing into its own Task Force (6 votes)
- #14 Host a Real Estate Discovery Night for New Licensees (5 votes)
- #15 Establish Local Official “Key Contact” List (3 votes)
- #16 Local Business Outreach Program (2 votes)

Next Steps

1. The Board of Directors reviews the suggested new tasks and priorities for inclusion in the 2020-2023 Strategic Plan. Consideration given to which tasks will be included in the three-year plan over time.
2. Staff and Leadership assign time-line for each task and note responsible group (staff, Board, Task Force, etc.) once priorities are determined.
3. Staff and Leadership set measurements for success on new tasks.
4. Final 2020-2023 Strat Plan approved by Board of Directors and implemented.
5. Formalization of Building Task Force: The recommendation of the Strat Plan attendees included formation of the Building Task-Force as quickly as possible, with work beginning in January of 2020.

In Closing

As outlined in this report, the diverse group of attendees at the September 20th planning session have provided numerous suggestions for refreshing and reframing the East Polk County Association of REALTORS Strategic Plan for the next three years. Establishing new priorities and fine-tuning existing goals will provide the platform for a strong Association with high member engagement.

Appendix 1: Goal Tracking Tables

GOAL #1 – PROFESSIONAL DEVELOPMENT					
Objective	Current and New Tasks/Ideas	Assigned to	Timeline	Measurement	Budget Impact
1. Work with Building Task Force to assist in planning space for educational offerings	New: Assist in planning for education space needs in new facility	Prof. Dev.TF And Staff	2020		To Be Set with Building TF
2. Continue professional series with focus on the Code of Ethics		Prof. Dev.TF And Staff	ongoing		N/A
3. Maintain the evaluation system for all offerings		Prof. Dev.TF And Staff	ongoing		N/A
4. New: Enhance Member engagement in educational courses by incorporating new formats and options	New: Classes in Roundtable format New suggestion: Organize a campaign to promote member use of FR Legal News (how to opt in, etc.)	Prof. Dev.TF And Staff	ongoing		Line Item including in Budget

GOAL #2 – ADVOCACY					
Objective	Current and New Tasks/Ideas	Assigned to	Timeline	Measurement	Budget Impact
1. Continuously seek opportunities to further expand advocacy with members	Current: Pursue Realtor Party Funds for advocacy focus	RPAC			N/A
2. Share Realtor Advocacy with local community	Current: ongoing voter registration drives New: Use “Who We R” campaign to highlight the role that EPCAR members play in positively impacting homeownership in the community	staff			Ties into Line Item for Assoc./Realtor Image
3. Increase participation in RPAC.	Current: through dues billing Current: through MLS billing New: Business Partner Involvement (auctions, sponsor events, sponsor and attend GARD, allowable contributions awareness)	staff		Member Contribution Reports -FR	N/A
4. Increase the number of members who attend and participate in Great American Realtor Days	Current: Increase Director attendance at GARD New: Encourage business partners to sponsor and attend (see #2 above)	RPAC & BOD			Line Item included in Budget
5. Promote broker and agent response to local calls for action	Current: use Association communication opportunities to encourage responses Current: campaign to increase number of	RPAC			N/A

	brokers/agents registered for the program				
Advocacy, Continued					
6. Increase opportunities for, and member awareness of, EPCAR's community advocacy efforts	<p>Current: incorporate efforts into EPCAR luncheons, meetings and related events.</p> <p>New: possible tie-in with website</p> <p>New: possible tie-in with recommendation to use video in all areas possible.</p> <p>New: Create a list of local authorities and contacts and offer resources (stats) for community housing information, local experts, etc.</p>	<p>RPAC</p> <p>STAFF</p> <p>BOD</p>			Ties into Line Item for Assoc./Realtor Image

GOAL #3 – CONSUMER OUTREACH					
Objective	Current and New Tasks/Ideas	Assigned to	Timeline	Measurement	Budget Impact
1. Engage the general public about the home buying process	<p>Current: Disseminate industry and market data to the general public</p> <p>New: encourage members to share EPCAR Posts through their social media platforms to further the outreach to the public via their individual networks; increase EPCAR FB followers as a result. (</p> <p>New: add q/a section to website-use free media options from other sources.</p>	<p>STAFF &</p> <p>COMMUNITY-MARKETING TF</p> <p>AND ALL MEMBERS - SHARE FB</p>			Ties into Line Item for Assoc./Realtor Image
2. Enhance community awareness of member involvement in charitable efforts	<p>Current: promote efforts of members to the public. (see task to use more video, task to create a mobile solution for members, request to members to share info on social media)</p>	<p>STAFF &</p> <p>COMMUNITY-MARKETING TF</p> <p>AND ALL MEMBERS - SHARE FB</p>			Ties into Line Item for Assoc./Realtor Image
3. New: Create a list of local authorities and contacts and offer resources (stats) for community housing information, local experts, etc.	<p>Use EPCAR resources/reporting to enhance relationship with local authorities</p>	<p>RPAC &</p> <p>COMMUNITY-MARKETING TF</p>			n/a
4. Increase promotion of EPCAR scholarship program and the contributions of Realtors to provide the program	<p>Tie in with #1 – share the scholarship awards through local media, social media, etc.</p>	<p>Scholarship TF</p>			n/a

GOAL #4 – COMMUNICATIONS					
Objective	Current and New Tasks/Ideas	Assigned to	Timeline	Measurement	Budget Impact
1. Increase name recognition within the community through communications		Staff & COMMUNITY-MARKETING TF	ongoing		Ties into Line Item for Assoc./Realtor Image
2. Build on information dissemination methods including social media, EPCAR website and other industry resources/websites, videos, email, texting and phone calls.	<p>Idea: Shift focus of the task force more towards marketing in 2020</p> <p>New: Increase use of video in all areas.</p> <p>New: Create a video library for members to use for training and for posting to consumers.</p> <p>suggestion: Use Instagram more frequently</p>	Staff & COMMUNITY-MARKETING TF			Ties into Line Item for Assoc./Realtor Image
3. New: Increase member engagement by building a mobile responsive website	New: make the current EPCAR website mobile responsive	BOD & Staff			Possible
4. Further engagement for member use of technology including how to use it	Idea: engage YPN group to assist in sharing technology with general members	Global-YPN Council			N/A

GOAL #5 – Association Structure & Operations					
Objective	Current and New Tasks/Ideas	Assigned to	Timeline	Measurement	Budget Impact
1. Begin planning for Association Facility needs	New: Establish a Building Task Force to review options for buy/build.	BOD	1/5/2020		N/A
2. Maintain financial assistance or scholarships for leadership development	Current: <ul style="list-style-type: none"> • Leadership Training for President-Elect • Expand Spokesperson Training opportunities for Officers 	STAFF	ONGOING		LINE ITEM - Directors
3. Ensure protection of all assets, including Association building	Current: <ul style="list-style-type: none"> • Budgeting and Planning • Establishing Reserves • Investment Tracking • Financial Reviews 	BOD CEO	Ongoing		Within current Budget
4. Ensure adequate resources for staff and their professional development	Current: <ul style="list-style-type: none"> • AEI • FR AE Workshop • FR sessions • MLS Admin workshop • Others 	CEO	Ongoing		Within current Budget
5. Ensure compliance with annual NAR Core Standards requirements	Ongoing annual process	CEO	Nov.1 st Every yr	Approval by NAR	Within current Budget
6. Increase collaboration and recognition with and for Business Partners	New: enhance new business partner membership with a Business Partner Mentor Program New: Create a local business outreach program to show benefits, potentially increase business partner membership	BP/Expo TF		Increase from current total	POSSIBLE

GOAL #6 – CULTURE ENRICHMENT					
Objective	Current and New Tasks/Ideas	Assigned to	Time Line	Measurement	Budget Impact?
1. Continue building a leadership recruitment program which elevates the opportunity to serve	<p>Current: Leadership training opportunities</p> <p>New: Create “Pathway to Leadership” promotion/documents detailing the steps and requirements to serve as a Director or an Officer.</p> <p>Consider: similar pathway for committee chairperson.</p>	BOD STAFF	August 1 st	Increase in # or applications/quality applicants	
2. Maintain a fun and impactful experience for EPCAR volunteers	Annual Appreciation Lunch	BOD STAFF			Yes- Assoc Sponsored Event
3. Encourage involvement of new members in the Association	<p>New: Create a new member welcome and informational drip campaign. Note: this could also tie in with the initiative to create more video type communications</p>	STAFF BROKERS			N/A
4. Continue strengthening the partnership between leadership and staff to increase EPCAR’s success	FOCUS STAFF APPRECIATION	BOD STAFF	ONGOING		POSSIBLE
5. Continue efforts to improve broker involvement and awareness	Current: EPCAR Broker Breakfast	STAFF BOD BROKERS RPAC			POSSIBLE

Appendix 2: Photo Gallery

GOAL 6: Culture Enrichment

ONGOING/KEEP/Enhance

- #1. Develop Media Strategy to promote member success to public/each other
- #4. Enhance visibility of Realtors in community
- 2. Leadership recruitment
- 3. Improve award programs
- 5. Create fun/impactful leadership

New Ideas:

- ① Recognize designations + other awards
 ↳ Newsletter, social media, mags, press, website, etc.
 ↳ monthly meetings announcements
 ↳ larger membership in the leadership selection process (democracy)
- ② Include larger membership in the leadership selection process (democracy)
 ↳ our membership is growing

Done:

- #1 - acknowledge volunteers
- #2 - Collection Process - Resumes
- #4.m

New:

- 1. Budget
- 2. Building Task Force
- 3. Path to leadership - Steps to be a director
- 3. Business Partner Mentor Program

Keep:

- 4 - 'Maintain'
- 5-8

Goal 1 Prof. Dev.

Completed: 2 + 3

Continue: 1, 4, 5

New ideas:

- Promote FR Legal news
- Relevant videos (short)
- Round table classes
- After hour classes

<u>Completed</u>	<u>New Ideas</u>
1, 2, 3, 7, → ongoing always room for improvement 6	* Business outreach Program
	* Real Estate Discovery Night
<u>Keep</u>	* video production
4, 5	* mobile-friendly website + App

Goal #2

Done - All 6

Keep - All 6 - maintain

New - Business Partner RPAC Initiative

Keep: Increase partnerships
with Business Partners, Increase
Promotion of Scholarship, Enhance community involvement

New: Mobile App, promotion of events
to public, Q/A, increased Facebook
presence, YouTube channel

Goal 3: Customer Outreach



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