

Strategic Plan Eastern Thumb Association of REALTORS® 2019

Mission Statement: To recognize all branches of the profession, and to serve as the advocate for their common interests.

1. To unite those engaged in the recognized branches of the real estate profession in this community for the purpose of exerting a beneficial influence upon the profession and related interests.
2. To promote and maintain high standards of conduct in the real estate profession as expressed in the Code of Ethics of the National Association of REALTORS®.
3. To provide a unified medium for real estate owners and those engaged in the real estate profession, whereby, their interest may be safeguarded and advanced.
4. To further the interest of home and other real property interest.
5. To unite those engaged in the real estate profession in this community with the Michigan Association of REALTORS®, thereby, furthering their own objectives throughout the state and nation, and obtaining the benefits and privileges of membership therein.
6. To designate for the benefit of the public, those individuals within its jurisdiction authorized to use the terms REALTOR® as licensed, prescribed, and controlled by the National Association of REALTORS®.

Prioritized Goals and Objectives

- I. **GOAL 1: CODE OF ETHICS.** Inform and educate ETAR members on how to increase their professionalism and ethical standards, as well as adhere to the NAR Code of Ethics.
 - A. **Objective 1:** Continue to offer and evaluate orientation locally and inform members of available educational opportunities and technologies online through NAR.
 1. **Strategy:** Determined by the Professional Standards Committee and Staff.
 - a. **Time frame:** Ongoing.
 - b. **Manager:** Association Administrator and Professional Standards Committee.
 - B. **Objective 2:** Publish legal updates, questions & answers; risk management, and fair housing educational opportunities for the members (e.g., *April is Fair Housing Month*) in Association newsletter.
 1. **Strategy:** Solicit information from Affiliates and industry experts and join the Fair Housing Center of Metropolitan Detroit, utilizing their newsletter with info for ETAR.
 - . **Time frame:** Ongoing.
 - a. **Manager:** Association Administrator, Professional Standards Committee.
 - C. **Objective 3:** Evaluate and enhance New Member Orientation with the ETAR value proposition.
 1. **Strategy:** Revisit courses, policies, and delivery of classes. .
 - . **Time frame:** January, 2019.
 - a. **Manager:** Association Administrator and President.

D. **Objective 4:** Provide new and continuing member NAR Code of Ethics training as required by Article IV of the NAR Bylaws.

1. **Strategy 1:** Provide an orientation program on the Code of Ethics of not less than 2 hours and 30 minutes of instructional time through online, home study, or Internet based instruction.
2. **Strategy 2:** Provide NAR Code of Ethics Training (formerly known as *Quadrennial Code of Ethics* training) by contracting with a private school approved of offer the program by NAR with CE credit on site or online every two (2) years.
3. **Strategy 3:** Continue to utilize orientation staff instructors on a monthly or needs basis for Code of Ethics training using NAR-approved material for new ETAR members.

. **Time frame:** Immediate.

a. **Manager:** Association Administrator and Executive Committee. E.

Objective 5: Enforce the NAR Code of Ethics for membership.

1. **Strategy 1:** Utilize the *2019 NAR Code of Ethics an Arbitration Manual* to provide due process for ethics and arbitration complaints.
2. **Strategy 2:** Utilize the Michigan REALTORS® legal counsel to guarantee the arbitration process complies with state law and utilize the Michigan REALTORS® version of the NAR Manual to assure compliance with the *Michigan Arbitration Act*.
3. **Strategy 3:** Appoint members to the Professionals Standards and Grievance Committees on an annual basis, provide training, and administer with Staff and Board of Directors approval.
4. **Strategy 4:** Provide Mediation services to membership as required by Article IV of the NAR Bylaws and utilize an outside facilitator to train Mediators.

. **Time frame:** Immediate.

a. **Manager:** Association Administrator and Executive Committee.

II. **GOAL 2: ADVOCACY.** The ETAR will be viewed by the public, media, and elected officials as an organization that protects and preserves private property rights and real property ownership.

A. **Objective 1:** Raise 100% of the established annual RPAC fund raising goal.

1. **Strategy 1:** Continue to include the NAR recommended RPAC contribution on the ETAR Annual Dues Billing Statement “Above the Line.”
2. **Strategy 2:** To promote RPAC contributions above the “Fair Share” level annually through General Membership Meetings (quarterly), ETAR website, the “ETAR Talk” e-newsletter, the NAR Mobile App. and the REALTOR® Party.
3. **Strategy 3:** Promote the benefits of RPAC dollars using NAR and MR materials at GM meetings and ETAR new member orientation, the ETAR REALTOR® Expo and the Summer Mixer.
4. **Strategy 4:** Include a Major RPAC investment from ETAR (\$1,000).
5. **Strategy 5:** Promote benefits of making RPAC contributions to all ETAR committees and the Board of Directors above the “Fair Share” level.
6. **Strategy 6:** Recognize ETAR members who have contributed as “Major Investors” or “above the line” on their annual dues billing with personal notes from the ETAR

President, special announcements, newsletters, ETAR website recognition and at ETAR General Membership Meetings.

a. **Time frame:** Immediate

b. **Manager:** Association Administrator and Board of Directors

B. **Objective 2:** Achieve participation rates on NAR and MR “Calls for Action” that are better than the average participation rates.

1. **Strategy 1:** Ask ETAR members to download and use the REALTOR® Action Center Mobile App., General Membership Meetings, email, website, newsletters, office meetings, education events, and new member orientation.

2. **Strategy 2:** Encourage brokers to sign up for the Broker Involvement Program so Calls to Action originate from the principal broker.

3. **Strategy 3:** Utilize the ETAR website and share ETAR Facebook postings to promote *Calls for Action* on the member’s personal social media sites.

4. **Strategy 4:** Utilize all ETAR communication vehicles to promote REALTORS® to respond to *Calls for Action* and NAR’s text messaging.

a. **Time frame:** Ongoing

b. **Manager:** Association Administrator and Board of Directors

C. **Objective 3:** Support private property rights, housing, and real property ownership by providing “Active” campaign assistance for local political candidates who are friendly to REALTOR® party issues.

1. **Strategy 1:** Review candidate’s credentials and qualifications as needed for the purpose of endorsement and promotion to make sure the candidate is friendly to private property rights and issues.

2. **Strategy 2:** Allow endorsed candidates a platform at ETAR functions and demonstrate REALTOR® Political Party Initiatives by having ETAR members speak on proposed local real estate related issues or regulations.

3. **Strategy 3:** Work with ETAR members who currently serve on city council, zoning boards, planning commissions and tax review boards to advocate private property rights.

a. **Time frame:** Immediate and Ongoing

b. **Manager:** Staff, Board of Directors and Government Affairs Committee

III. **GOAL 3: CONSUMER OUTREACH.** The public and local media will see ETAR as primary, reliable source for real estate information.

A. **Objective 1 (Voice for Real Estate):** Be the voice for real estate and promote Realcomp market statistics and/or NAR *Talking Points* as they impact the public.

1. **Strategy 1:** Provide press releases with Realcomp MLS data and MR reports to *The Times Herald, Sanilac County News and Yale Expositor* (local newspapers).

2. **Strategy 2:** Continue to use Google, Facebook, YouTube, LinkedIn; through MR “Public Policy Statements,” NAR “Talking Points,” and MR-approved updates.

3. **Strategy 3:** Send e-newsletter (ETAR Talk) to REALTOR® members, affiliates, and broker’s administrative staff.

a. **Time frame:** Immediate and Ongoing

- b. **Manager:** Staff and Board of Directors
- B. **Objective 2 (Community Involvement):** Promote and enhance the value proposition of using an ETAR member by engaging in community activities which enhance the REALTOR® image.
 - 1. **Strategy 1:** Examples include participate in Blue Water Chamber of Commerce, continue to conduct REALTOR® Expo at Alexander's Banquet Hall in Marysville (for membership and to be extended to the public where members and local businesses participate), and promote national open house weekend locally and distributing NAR and MR material that illustrates the value proposition of using a REALTOR®.
 - 2. **Strategy 2:** Volunteers ETAR members for maintenance and painting of the *Hunter Hospitality House* (2 locations for families to be near hospitalized loved ones).
 - a. **Time frame:** Immediate and Ongoing
 - b. **Manager:** Staff and Board of directors
- C. **Objective 3 (Advocacy Efforts):** Engage the public in legislative/political issues that impact local real estate.
 - 3. **Strategy 1:** Contact Sarnia (Ontario, Canada) Association of REALTORS® regarding common interests and efforts as it relates to our international boundary.
 - 4. **Strategy 2:** Encourage participation in local political office or regulatory bodies (e.g., Marysville and Fort Gratiot Board of Review, Marysville Planning Commission, St. Clair County Parks and Recreation Commission.)
 - 5. **Strategy 3:** Attend city council and township meetings and other civic meetings to promote REALTOR® awareness and causes.
 - 6. **Strategy 4:** Explore applying for NAR Issues Mobilization Grant regarding Port Huron ban on new rentals within certain geographic areas with variance possibility. <http://www.realtoractioncenter.com/for-associations/issues-mob>
 - a. **Time frame:** Ongoing
 - b. **Manager:** Staff and Consumer Outreach Committee
- D. **Objective 4: (Community Investment):** Strengthen community investment by organizing human resources or fundraising for the benefit of charitable/community organizations.
 - 7. **Strategy 1:** Salvation Army "Ring the Bell" Day.
 - 8. **Strategy 2:** Continue the Christmas gift boxes for military.
 - 9. **Strategy 3:** Participate with Mid-City Nutrition Program (i.e., Soup Kitchen) serving meals to those in need in the community.
 - 10. **Strategy 4:** Work with Marysville Fire Department to share their facility for ETAR programs and events with the public.
 - 11. **Strategy 6:** Work with ETAR affiliates in promoting *Hometown Heroes* Program.
 - a. **Time frame:** Throughout the year as needed
 - b. **Manager:** Staff and Task Forces

IV. **GOAL 4: OPERATIONAL.** ETAR will provide a stable entity for its membership that will support its operation now and in future years through local, state, and national affiliation. A.

Objective 1: Unification efforts and support of the REALTOR® organization.

1. **Strategy 1:** Continue to retain legal counsel on an annual basis who is local, state and national experienced and well versed in REALTOR® issues, real estate law, Michigan license law & rules, risk management and association governance.
2. **Strategy 2:** Adopt and maintain corporate documents, policies and procedures that conform to local, state and Federal laws.
3. **Strategy 3:** Timely file legally required reports and documents for state corporation reporting and state/Federal tax returns.
4. **Strategy 4:** ETAR shall appoint a Strategic Planning Committee on an annual basis for the purpose of creating and adopting a one-year Strategic Plan with an Advocacy component which meets the needs of membership and NAR standards.
5. **Strategy 5:** ETAR will ensure that the *Association Administrator* complete at least six hours of REALTOR® association professional development on an annual basis through a state, regional or national offering of NAR approved training.
6. **Strategy 6:** ETAR will promote through its website, newsletter, meetings and social media to its membership on an ongoing annual basis the importance of participating in any NAR-conducted effort to assess the members understanding of the overall Value Proposition provided by all three levels of the REALTOR® organization.
7. **Strategy 7:** ETAR will utilize the State of Michigan's Department of Licensing and Regulatory Affairs (LARA) website, as well as the Michigan REALTORS® source of information, to identify licensees within the ETAR area who are in Limited Function Referral Organizations (LFRO) for the purpose for inviting their participation in the REALTORS® political advocacy with "Calls for Action" and/or contributions to "Political Advocacy Funds" (PAF).
8. **Strategy 8:** To ensure proper dues reporting and collection, ETAR will review at minimum semi-annually, or on a needs basis if necessary, the Department of LARA list (or list provided by the Michigan REALTORS®) of member broker-owners and those Non-Member Licensees employed under their state Broker I.D. number.

a. **Time frame:** Immediate.

b. **Manager:** Executive Vice President and Executive Committee with Legal Counsel.

B. **Objective 2:** Provide updated **TECHNOLOGY** to service ETAR member needs in daily communication, professional standards and risk management.

1. **Strategy 1:** To continue the use of an interactive ETAR website which features active links to the Association Bylaws, Professional Standards Forms and Local Complaint Filing Procedures, NAR Code of Ethics, Fair Housing Information and Reporting Procedures, NAR and MR sites which feature member Programs, Products and Services.
2. **Strategy 2:** Member communication will continue to utilize the present Internet based member text system for all official correspondence, broadcast and notices.
3. **Strategy 3:** Provide ETAR office for member use and convenience.

- a. **Time frame:** Ongoing.
- b. **Manager:** Association Administrator and Executive Committee.

C. **Objective 3:** ETAR shall annually demonstrate **FINANCIAL SOLVENCY** to its members and Board of Directors.

- 1. **Strategy 1:** Adopt financial policies to ensure the fiscal integrity of the ETAR financial operations which includes fraud awareness and prevention, handling of all monies (in and out), opening of mail, payment of bills and invoices, bank deposits, budget policies, travel policies, investments, reserve level, compensation, conflict of interest, whistle blower policy, document retention and bankruptcy policy.
- 2. **Strategy 2:** Annual submission to the Board of Directors, and membership upon request, a CPA report which is either an Audit Opinion or an Accountant's Review.

- a. **Time frame:** Ongoing and continual.
- b. **Manager:** Staff, Board of Directors, Legal Counsel, and CPA.

V. **GOAL 5: ORGANIZATIONAL SUCCESS.** To facilitate the productivity and profitability of ETAR members and the viability of the Association.

A. **Objective 1:** Evaluate each program and service ETAR offers and their related committees/task forces.

- 1. **Strategy:** Conduct membership surveys.

- a. **Time frame:** Ongoing and Annual.
- b. **Manager:** Staff and Board of Directors.

B. **Objective 2:** Work to build and retain ETAR membership.

- 1. **Strategy:** Promote opportunities in the real estate profession and the advantages of belonging to ETAR.
- 2. **Strategy 2:** Establish annual ETAR recognition of volunteer members by newsletter, membership meetings and personal contact or notes from the President.

Time frame: Immediate and Ongoing.

- a. **Manager:** Staff, Executive Committee and Board of Directors.

C. **Objective 3:** Investigate new sources of discounts and other promotions to members, including increasing Affiliate membership.

- 1. **Strategy 1:** Obtain new Affiliate members.
- 2. **Strategy 2:** Continue to review new member service possibilities.

Time frame: Ongoing.

- a. **Manager:** Staff and Board of Directors.

D. **Objective 4:** Continue to look for new tools to partner on initiatives designed to save money for members.

- 1. **Strategy:** Promote Michigan REALTORS® and NAR member programs, as well as solicit community partners.

Time frame: Ongoing.

- a. **Manager:** Executive Committee.

E. **Objective 5:** Inform members of available ETAR resources.

- 1. **Strategy 1:** Provide information at new member orientation.

2. **Strategy 2:** Provide information to existing members at General Membership Meeting.
- a. **Time frame:** Ongoing.
- a. **Manager:** Staff and Professional Development Committee.
- F. **Objective 6:** Provide resources for or access to leadership development education or training for ETAR's elected leaders and document those resources.
1. **Strategy 1:** Establish a Young Persons Network (YPN) Task Force.
 2. **Strategy 2:** Analyze the Michigan REALTORS® YPN model.
 3. **Strategy 3:** Report results by June 30, 2019.
 4. **Strategy 4:** Contract with an outside provider to conduct annual leadership training for all officers, directors, committee chairs and the association administrator with a binder for all written reference materials (i.e., bylaws, policies & procedures, leadership guidelines, director liability, antitrust). (Minimum 4 hours)
 5. **Strategy 5:** Contract with a Parliamentarian to provide an easy to understand presentation of *Roberts Rules* and how to run successful meetings (Minimum 2 hours)
 - a. **Time frame:** Immediately and June 30, 2019 for Strategy 3.
 - b. **Manager:** Association Administrator and Executive Committee
- G. **Objective 7:** Conduct a program or activity promoting REALTOR® Safety for Members.
1. **Strategy 1:** Utilize Affiliate Members to sponsor a self-defense workshop.
 2. **Strategy 2:** Provide constant safety pieces in the ETAR newsletter, emails, texts and ETAR Facebook posts titled "Safety Tips" discussing safety protocol for members.
 3. **Strategy 3:** Promote the NAR 6-Video Series on Safety through emails to members.
 - a. **Time frame:** Immediately and Ongoing
 - b. **Manager:** Association Administrator and Board of Directors

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