

**Harford County Association of
REALTORS®
Strategic Plan 2010 – 2014**



Approved September 2009
Amended May 5, 2011

Strategic Planning Environment

The Harford County Association of REALTORS® was founded in 1960 as a part of the federated structure of the Maryland and National Association of REALTORS®. The Internal Revenue Service designates HCAR as a 501(c) (6) organization with approximately 1,400 members.

HCAR's board of directors undertakes strategic planning about every three years -- last completed in 2005 by the strategic planning committee. The strategic plan drives successive presidents; and guides committees, influences the finances, and affects levels of staffing.

Rapidly unfolding events in financial markets and the economy in general have markedly altered and possibly permanently transformed the environment in which REALTORS® do business. Diminished availability of affordable mortgage financing, a significant increase of short sales and foreclosure activity and an obscure economic outlook has reduced the consumers' willingness and ability to buy, sell or lease real property in the surrounding area.

The strategic Plan of the Harford County Association of REALTORS® consists of five strategic objectives focusing on the challenges and opportunities confronting the Association and its members. These objectives will guide the Association toward a future that brings about a stronger relationship between the Association, its members and consumers so that the members will be recognized as a professional, competent and trusted source of information, while remaining the first point of contact in a real estate transaction. Key to this three party relationship will be the distribution of comprehensive and reliable information.

Alternate methods of communication are a growing imperative in an environment where members and consumers have myriad online and web-based resources to communicate and interact in their professional and personal lives.

With the strength of the REALTOR® organization, the Association will continue to support public policies that advance private property rights and protect the right of our members to conduct business.

The HCAR Strategic Plan is a visionary guide for the Association as it develops new programs and services for members while adhering to its vision.

Strategic Planning Principles

Passion for Excellence

Stewardship of the Profession

Trust of the Members

Diversity in Leadership

Mission Statement

The mission of the Harford County Association of REALTORS® is promotion of the prosperity of REALTORS® and our communities

Vision

REALTOR® members are successful professionals who are recognized, respected and valued in every real estate transaction

Goals

- Offering Continuing Education and Career Advancement
- Advocating and Protecting the Real Estate Profession
- Serving Members with Programs, Events and Services
- Connecting with Members and Our Communities
- Maintaining a Viable Association

Strategies

Recommendations:

1) **Offering Continuing Education and Career Advancement**¹ (Education Committee)

a) **Continuing Education**

- i) Deliver quality continuing education to support license renewal.
- ii) Continue initiative for free CE included in dues.
- ii) Offer the required Supervisor- Broker Manager Class

b) **Career Development Education**

- i) Provide courses that facilitate Realtor prosperity and success.
- ii) Provide information on social media, technology and networking applications as they apply to business.
- iii) Other courses as identified by members.

c) **On Line Education**

- i) Determine member interest in on-line, electronic courses.
- ii) Identify courses available from NAR and MAR that can be linked through HCAR website (without expense to HCAR.)

d) **Designation Courses**

- i) Offer NAR designation courses.
- ii) Develop comprehensive plan for offering designation courses in systematic method.

e) **Leadership Academy**

- i) Offer academy annually to enhance member leadership skills (i.e. organized real estate structure, spokesperson training, community relations, etc.
- ii) Collaborate with industry resources to establish curriculum.

¹ Professional development and career education.

- iii) Consider support for leadership academy through an HCAR Leadership and Education Foundation.

2) **Advocating and Protecting the Real Estate Profession**² (Legislative Committee)

a) **R-PAC**

- i) Meet and exceed the annual goals of supporting R-PAC.
- ii) Improve member awareness of the purpose and achievements of the PAC.

b) **HCAR-PAC** – Identify the purpose and best use of the HCAR-PAC for supporting *local* candidates and issues.

c) **Government Affairs Director** – Continue effective use of GAD to benefit members.

- i) Create a job description and specific duties for the GAD.

d) **NAR and MAR** – Maintain strong relationships with NAR and MAR to offer stronger local advocacy efforts.

e) **Municipal Governments**

- i) Study and create a policy of HCAR taking positions to support candidates.
- ii) Identify ways to monitor and influence city and county governments.

3) **Serving Members with Programs, Events and Services**³ (Staff & BoD)

a) **Membership Growth**

- i) Set a growth goal for next five years, i.e. percent of desired reasonable market penetration or a number such as 2,000 members by 2015.

b) **Secondary Designated Realtors** (Policy Committee)

- i) Offer free membership to secondary designated Realtor to increase information flow in an office.

c) **Integrity of Realtor Members** (Staff)

- i) Identify Realtors in member brokerages that are not paying dues but benefiting from HCAR; and make contact.

² Government relations.

³ Membership growth and services.

- ii) Report Realtors using NAR, MAR, HCAR insignia and benefits as a non-member.
 - iii) Work with the state AE task force on membership.
 - d) Broker Offices** – Connect with brokers and offices to increase percentage of members in each office.
 - e) Dues Structure** (Staff & Bylaws Committee)
 - i) Promote split dues payment availability to meet members’ needs in economic times.
 - ii) Identify restrictions to membership due to mandatory annual billing cycle not allowing pro-rated dues.
 - f) Membership Benefits** (Membership Committee)
 - i) Research “golden handcuff” benefit of such high value that members are drawn to the association and would not drop out.
 - ii) Review entire portfolio of benefits, services and events to determine if HCAR packaging and marketing can be improved.
- 4) Connecting with Members and Our Communities⁴** (Membership Committee)
- a) Broker Relations** - Reach out to brokers to identify how HCAR can best serve their needs and how to improve HCAR image in their offices.
 - b) Allied Groups Collaboration** – Work with existing groups to communicate HCAR programs and opportunities, i.e. orientation audiences, Women’s Council, Million Dollar Roundtable, Rookie Realtors, etc.
 - c) Social Media and Technology** – Maintain or expand use of Facebook and other social media to communicate with and engage members.

⁴ Communications, internal and external PR.

d) HCAR Website

- i) Invest in improving the website; appoint a task force to identify the purpose and users of the website, make recommendations and propose multi-year plan and budget.
- ii) Add photos to board and staff rosters.
- iii) Maintain opportunities for member input and short surveys via the site.

e) Social Events – Offer opportunities for members to socialize at Realtor events:

f) Membership Database – Invest in updating and maintaining accurate contact information for members.

g) Community Involvement

- i) Provide a forum for charitable organizations to inform Realtors of their services and needs.
- ii) Identify the charitable efforts of individual Realtors and promote their work to improve awareness of the impact of Realtors.

h) Public Relations – Improve press release distribution and photo opportunities to communicate the role of HCAR and Realtors in communities.

5) Maintaining a Viable Association⁵ (Staff and Board of Directors)

a) Association Staffing

- i) Maintain level of office staffing adequate to serve the members with quality.
- ii) Budget appropriately for staff professional development, annually.

b) Committees

- i) Improve annual orientation of the committees.
- ii) Adopt a policy of expectations and operations of committees; i.e. minutes required, maintenance of a sustainable committee notebook, etc.

⁵ Association infrastructure.

iii) Be certain all committees are working to advance the mission, goals and strategies in the strategic plan.

c) Board Orientation

i) Expand beyond a half day.
(amended 7/22/10)

ii) Review of progress of the strategic plan annually.

iii) Create written job descriptions of the role of officers (i.e. VP serves as spokesperson at direction of the Pres; President Elect maintains the strategic plan; Secretary/Treasurer responsible for budget, audit and maintenance of the governing documents.)

d) Foundation - Explore development, purpose and funding plan for an HCAR foundation.

e) Policy Manual – Update and reformat for leadership usage.

Next Steps

- Circulate Final Draft to Board
- Adoption of the Amended Mission and Goals by a Motion of the Board
- Promotion of the Plan to Members and Stakeholders
- Assignment of Plan or Goals Champions
- Appointment of Task Forces or Committees, including Timelines, Expectations and Performance Measures (annually)
- Evaluation of Plan Progress by the Board (annually)
- Three Year Complete

Alignment of the Strategic Plan

| | | | | | |
|---------------------------|---|---|--|---|--|
| | | | | | |
| Goal Area | Education | Gov't. Affairs | Membership | Communications & PR | Association Infrastructure |
| Statement | Offering Continuing Education and Career Advancement | Advocating and Protecting the Real Estate Profession | Serving Members with Programs, Events and Services | Connecting with Members and Our Communities | Maintaining a Viable Association |
| Strategies | <ul style="list-style-type: none"> • Continuing Education • Career Development Education • On Line Education Supervisor-Broker Office Manager Class Designation Courses Leadership Academy | <ul style="list-style-type: none"> • RPAC • HCAR PAC • Government Affairs Director • NAR and MAR. Municipal Governments | <ul style="list-style-type: none"> • New Licensees • Membership Growth • Secondary Designated Realtors • Integrity of Realtor Members • Broker Offices • Dues Structure • Membership Benefits | <ul style="list-style-type: none"> • Broker Relations • Allied Groups Collaboration • Social Media and Technology • HCAR Website • Social Events • Membership Database • Community Involvement • Public Relations | <ul style="list-style-type: none"> • Association Staffing • Committees • Board Orientation • Foundation • Policy Manual |
| 2010 Budget | \$0 | \$0 | \$289,400 Dues [75%] | \$0 | Misc. |
| Income (\$382,700) | + Trade Show | | + Non Dues (i.e. store, lockbox.) | | Room Rental Interest Misc. |

| | | | | | |
|---------------------|--|--|---|--|--|
| Staffing | Admin Assist | GAD | Admin Assist | | EVP Admin Assist |
| Committees | <ul style="list-style-type: none"> • Education • Equal Opp • Commercial • Trade Show | <ul style="list-style-type: none"> • Legislative-RPAC | <ul style="list-style-type: none"> • Membership • Awards • Grievance • Mort Finance • Grievance • Orientation • Prof Standards • Rookie | <ul style="list-style-type: none"> • Networking • Website/Tech Task Force • Scholarship Charity | <ul style="list-style-type: none"> • Bylaws • Finance/<i>Audit</i> • Nominating • Policy • Strategic Planning |
| Subsidiaries | Foundation Potential | RPAC & HCAR PAC | Lockbox | - | - |