

**Midwestern Ohio Association of REALTORS®**  
**Strategic Plan**  
**2018-2020**

**Mission:**

The Midwestern Ohio Association of REALTORS® promotes public policies beneficial to the real estate industry, supports advocacy for private property rights and home ownership on behalf of consumers, and strives to enhance our membership's ability to achieve business success while promoting ethical practices and the value of the REALTOR® profession.

**Goal 1: Legislative Advocacy and Fund Raising**

MOAR will be at the forefront of educating the membership, public, and elected officials to help everyone understand the impact of public policy and legislation on the real estate industry.

1.1 Develop and implement **VOTE, ACT, INVEST** member education campaign to promote the connection between involvement in advocacy and sustaining individual REALTORS' business.

A. VOTE

- At least annually, conduct **legislative outreach** program for members to provide information on local/state/national issues that affect the real estate industry.
- Promote the importance of being a registered voter

B. ACT

- Increase awareness and need for participation in national and state **Calls for Action** and how each REALTOR voice can impact pending legislation
- Develop an "RPAC Ambassador" program from the membership who will speak about RPAC at meetings, events, etc.

C. INVEST

- Continue "above the line" RPAC **contribution on dues invoice**
- Include \$15 RPAC contribution with NAR/Ohio and local dues billing
- Develop an "**Getting To Know RPAC Kit**" that would be distributed to new members and to each brokerage with RPAC talking points, information about Ohio RPAC "wins", investment levels, how to respond to objections for contributing, etc.

1.2 Conduct at least **one fund raising event to raise voluntary contributions** from membership to assist the REALTOR Party in supporting issues and elect local, state, and national officials who support issues that matter to the real estate industry, the nation's property owners and to build a strong community.

- Plan and implement **annual fundraising event** to attain annual Ohio REALTORS Local Board Goals
- Participate in **regional RPAC Major Investor events** to encourage membership to "step up" giving or encourage contributions from someone who has not supported RPAC.

- 1.3 Communicate **and build relationships with local elected officials** to monitor trends, economic development, legislation, support property rights and home ownership, etc.
- Regularly communicate with local elected officials about issues that affect the real estate industry
  - Encourage membership to attend community legislative events including Chamber of Commerce events, city/county councils, etc. to network with elected and appointed officials.
  - Create a roster of MOAR members who participate in elected city/county government positions, etc.
- 1.4 MOAR will expand its advocacy through utilization of state/national resources available which may have an impact on local ordinances, laws and policy issues.
- A. Investigate **Issues Mobilization** funding to address local issues impacting property ownership, strengthens schools and communities to encourage home ownership.
- Investigate the use of dollars to assist local issues such as school levies, farm reform, etc.
- B. Investigate **MY REALTOR® Party grants** (e.g. Smart Growth, home ownership, diversity, place making, etc.) to increase community outreach of the association.

## **Goal 2: The REALTOR® Brand (Professionalism)**

Increase the credibility and visibility of the REALTOR® brand (professionalism) to the consumer and reinforce ethical behavior between fellow REALTORS.

- 2.1 Communicate **relevant stories describing the REALTOR profession to the consumer.**  
Develop consumer awareness campaign on how REALTORS are the "trusted Voice of Real Estate".
- Detail messages/stories about **“Why Using a REALTOR is important when buying/selling a house.”**
  - Promote monthly residential market statistics (local, state and national), trends in the industry, etc. through press release, interviews, promotion on website, etc. of MLS statistics, NAR research reports, etc. so the **communities can see REALTORS as the “experts.”**
  - Present/participate in activities that educate the consumer about the value of using a REALTOR.
  - Sponsor or host home ownership fairs for consumers
- 2.2 Develop a plan to **reinforce/remind agents of ethical practices and behavior between fellow REALTORS.**
- A. **Understand and practice the Code of Ethics** and remind REALTORS about the duties and obligations they should uphold. (How do we “police our own industry?”)
- Provide Ethic case study, trivia test, etc. to Brokers for discussion in meetings
  - Include ethics questions in social media, email blasts, newsletter, etc.
- B. Maintain a **viable Professional Standards** process to enforce the Code of Ethics and provide arbitration and mediation as a member service.
- Promote the value of local and state **ombudsman programs** as a means of effectively addressing and proactively resolving disputes.

- Continue participation in a cooperative agreement with Dayton REALTORS to provide Professional Standards services.
- Provide a link to the NAR Code of Ethics/Professional Standards resources on the MOAR website for members and consumers.

### Goal 3: Member Services

MOAR strives to promote the value of Board membership as we seek to work less as competitors and more as collaborators.

#### 3.1 Define/outline the **benefits of their membership**

- A. Offer, promote or provide opportunities for core classes and annually conduct a REALTOR Safety course.
- B. Provide **elective continuing education** to the membership as the need arises (i.e. hot topics, technology, social media, business best practices, transactions, etc)
- C. Solicit/review information about prospective education courses and speakers to be reviewed by Member Services Committee

#### 3.2 Utilize a variety of **communication methods to ensure regular contact with members.**

- A. Ensure appropriate resources to **manage communication** through technology or traditional methods.
- B. Increase MOAR's **social media presence** through selected platforms
- C. Investigate communication options through **mobile devices**

#### 3.3 Encourage **member engagement/networking** in association activities and how it benefits the agent's career.

- A. Investigate a "**Membership Activity/Participation**" program (with a prize) to promote participation in classes, membership activities and association opportunities
- B. Participate in Affiliate Committee networking events and fundraising activities
  - Investigate **beneficial ways to showcase affiliates** and utilize their resources i.e. sponsorship of classes, presenting CE classes,

#### 3.4 Develop Broker resources for use in their brokerage

- A. Develop a **Continuing Education Broker Series**, possibly in conjunction with Springfield Board to offer 3 programs annually
- B. Investigate providing "Topics In a Box" **topics which brokers can use** for discussion at sales meetings i.e. ethics, RPAC, Cybersecurity, etc.

#### 3.4 Provide **Awards and Recognition** to those who members who seek out additional education/designation, participate in Association committees and leadership positions and get involved in the real estate industry.

- A. **Review the current list of awards and recognition** to assess if there are alternatives, new awards (i.e. sales levels), etc. we should be offering
- B. Continue sending one new member to **Tomorrow's Leader Today** program sponsored by Ohio REALTORS.

## Goal 4: Community Outreach

Promote the incredible impact REALTORS make on their communities by volunteering and how it creates a positive REALTOR image in the community.

4.1 **Promote the volunteer community activities REALTORS** engage in which promotes a REALTORS desire to create a safe and vibrant communities to “sell.”

A. Reach out to reporters/newspapers/websites with stories and/or content that demonstrates a REALTOR involvement helps build vibrant communities to live in and sell. **#REALTORSDoingGreatThings**

B. Design a REALTORS Care logo for **t-shirts which members can purchase and wear when they volunteer.**

- Display pics of volunteers with shirts on all social media platforms and website

4.2 Heighten community investment through **organizing human resources and/or fund raising** events

A. Promote **member-driven community activities** such as REALTORS Care Day, Habitat for Humanity build, blood drives, National Night Out, etc. that showcase REALTORS involvement that makes our communities and neighborhoods stronger.

B. Plan and implement at least one **member-driven fundraising activity** (silent auctions, donation drive, Chili Cook Off, etc.) that REALTORS/Affiliates can participate in with the proceeds benefitting local charities

## Goal 5: Management/Financial Solvency/ Organizational Development

Continue a dynamic structure and systems of governance that provides for member involvement, promotes leadership and utilizes staff and financial resources.

5.1 Every association will **conform to local, state and federal laws**, including filing necessary reports and documents

- Sales Tax (filed bi-annually)
- Bureau of Workers Comp (annually)
- Federal/state/local tax returns (annually)
- Certificate of Continued Existence (last filed 5/16/2016--due every 5 years)
- Unclaimed Fund document (file annually by Nov 1)

5.2 Monitor MOAR's **financial and investment policies** protect and grow MOAR's assets.

- Develop annual budget, monitor monthly and report to Board of Directors
- Review monthly reconciliation of checking, savings and credit card accounts and signed off by member of Executive Committee
- Retain independent CPA for annual review and a full audit every third year in compliance with NAR Core Standards requirements
- Review MOAR Financial Policy annually
- Review MOAR Investment Policy and progress with third-party representative annually

### 5.3 Board of Directors

- Every Association will annually **certify that its Board of Directors has reviewed and discussed the association's strategic plan** and that the components have actionable implementation strategies.
- Ensure association **by-laws are certified by NAR annually** and reviewed if changes are made.
- Association will annually provide resources for **leadership development** education and/or training for **elected REALTOR® leaders**.
- New Directors will participate in Orientation prior to the first Board of Director meeting they attend
- All Board of Directors must sign **Leadership Commitment/Conflict of Interest** document in January of each new year
- Proactively identify and recruit future elected leaders by **providing leadership opportunities** through committee participation
- The Nominating Committee will develop a **Succession Plan** to prepare for future leadership of the Board of Directors.

### 5.4 Core Standards

Association will annually review and put into place activities to ensure **compliance with NAR Core Standards**.

- Re-structure MOAR Committees so the activities which committees perform will meet core standards.

### 5.5 Code of Ethics

- A. Every Association will provide new and continuing member **Code of Ethics training**.
  - Track **New Member Training Compliance** within 60 days of membership application.
  - Track compliance with the **bi-annual NAR Ethics requirement** for all MOAR members
- B. Maintain a **viable Professional Standards** process to enforce the Code of Ethics and provide arbitration and mediation as a member service.
  - Provide a link to the NAR Code of Ethics/Professional Standards resources on the MOAR website for members and consumers

### 5.6 Human Resources

- A. Association will review **Personnel Handbook** annually and have legal counsel review any changes or updates to the manual.
- B. Association will develop policy and procedures for conducting **annual performance review** of paid staff
  - Occurs in October for the Executive Officer and other paid staff will be conducted during their anniversary month
- C. The Executive Officer **MUST** attend at least **six (6) hours of REALTOR association professional development** on an annual basis.

## 5.7 Technology

- A. Every association must have an **interactive website** (defined as the ability to move between websites and create active links) and is ADA compliant
- B. Investigate **association management software** that would be compatible to QuickBooks and provide membership and education tracking tools and have merge functions to allow quick and easy mail, fax, email, label, etc.

## 5.8 Work with **Affiliate committee** to promote and encourage interaction between Affiliate and Realtor members.

- Develop an **Affiliate Membership Recruitment Campaign** which highlights the value of MOAR membership
- Encourage **Affiliate participation** in advocacy education and fundraising activities

Strategic Plan Certification

This Strategic Plan includes Advocacy and Consumer Outreach components and has been officially adopted by the Board of Directors of the Association. It will be reviewed annually by the Board of Directors and submitted to NAR for approval.

Board of Directors approval:

Date: 8-2-18

Mary A. Truckamp  
President signature

Date: 8-2-18

Buyer DGAH  
President-Elect signature

Date: 8-2-18

Brenda Blair  
Association Executive signature

Date: 8-2-18