



## 2020-2023 Strategic Plan

**Our Vision:** To advance the local real estate industry by shaping public policy, adhering to the REALTOR® Code of Ethics, and to provide the information and tools our members need to succeed.

**Our Mission:** To be the business and public policy advocate for our members and the community they serve.

At-A-Glance

*Objective 1*

### **Investment & Inclusion**

**Invest in Staff, support, and tools to serve members.**

Rationale: We are understaffed and have created a hole in communications to members of our wins, support, systems and tools that benefit them through the Association. Communication is continually discussed with no solution to improve it. It is time to invest in staff, services, training, tools, and support as a member value.

*Objective 2*

### **Elevate**

**Education, Training and Engagement with/for Current and New Leadership and Staff**

Rationale: We MUST implement an on-going training system for new volunteer leaders, directors, and Chairs/Vice Chairs. This education needs to expand to communication to committees, brokers, and members to further improve awareness and develop plans for success which is a direct value to the members.

*Objective 3*

### **Advocate**

**Use our Values to Define Opportunities for our Members and our Community**

Rationale: We are our own best kept secret. Between our wins and successes, and what we take for granted, the opportunity to influence our members, our community, business partnerships, the state and even NAR is wide and deep. By focusing on who we are and delivering this by way of value through our communications, connection, and activities, we will influence current and future opportunities of OMCAR and its members.

*Objective 4*

### **Core Standards**

Rationale: NAR required Core Standards and how the staff under the leadership of the CEO ensures the following requirements are met. These are critical functions of the Association, and all areas are to be properly delegated to leadership, committees, and/or staff as needed.

# Investment & Inclusion

## Invest in staff, support, and tools to serve our members.

- *With research through the state and NAR, implement the change to move the current AE position to that of CEO for the Association. As part of this change, research and implement a contract for this role to create a foundation of stability and trust to insure effective communication and support to/from leadership volunteers*
- *Allow the CEO to determine needs of staffing and, as additional staffing support is needed, allow the CEO the opportunity to expand. It was specifically discussed the area most needed currently is to support member communication, marketing, contact, member advocate, outreach, and or P/R position, but is to be researched*
- *In working with staff and related committees, identify the possible need for outsourced P/R support, guidance, and experience to ramp up this internal support role*
- *The staff, at the direction of the CEO, is to research and define the technology and IT infrastructure investment needs to best serve its members*
- *At the direction of the CEO, begin a by-law review to provide recommendations and rationale as required to update where and as needed*
- *Research and implement on-going staff training as deemed appropriate and necessary to best serve the members needs*
- *Promote all issues and items that are “taken for granted” by leadership as just “what we always do”, members are unaware, and this leads to enormous possibilities*
- *Success and “what’s in it for me” (WiiFM) for membership constantly reinforced*
- *Ability to improve attendance and better promote meetings, education, connectivity, and involvement*
- *Improve the perception of an open culture leading to more involvement*
- *Ability to share and promote the Association’s biggest accomplishments*
- *Dramatically expanding your digital reach, presence, content, and tools for membership*
- *Develop an annual “leaders” promotional piece so members know who the LT is*

# Elevate

## Education, training and engagement with/for current and new leadership and staff.

- *Develop a system to effectively cycle chairs and vice chairs each year in all committees including leadership training to occur with every change to any committee*
- *Implement specific requirements and training for the elected officers, with help from staff, to properly set up these leadership volunteers for success, including potentially mandatory training, more than once/cycle to create the best opportunity for success for the LT, board, chairs, and vice chairs, along with any other future leader roles*
- *Tweak the current communications strategy between chairs, vice-chairs, leadership, and staff to clearly identify staff and volunteer roles and communication to/from leadership*
- *Develop an on-going training and communications program for incoming leadership so it is not only a “one time per year” event. Create opportunities for success*
- *Enhance the role of the executive committee to properly drive the agenda and refocus the growth and future opportunities of all board meetings. Do not leave this to staff-staff runs the business, volunteers lead it*
- *Implementing a mentorship/buddy program within the leadership team and committees to “bring new people along” in the process-assign experienced leaders to new leaders*
- *Implement an all leadership team meeting, including chairs and vice chairs to improve communication to/from all levels*
- *Share details on all roles and educate leadership on who’s doing what and why. Always focus on WifFM to understand the results, the value to the members you serve, rather than just doing the activity to get it done*
- *Implement on going mandatory growth opportunities for roles and expectations on Exec Committee, BOD, Chairs and Vice Chairs and members of the committee-look at results-oriented communication, not “we need another meeting”*
- *Clarify role of staff and committee work and insure proper education to chairs and vice chairs as to roles and responsibilities*
- *Bring future leaders in earlier in the process, and involve Leadership Academy in new and innovative ways along the process*
- *Engage brokers directly to identify talent, and show the value of training, support and tools members will receive by getting involved with the Association. Rather than simply asking for time from them, always show the value they will take back to their business*
- *Identify the committees that are working and/or not working in their current form. Change as needed, and provide education and training to the “results” needed not work expected by each committee annually*

# Advocate

## Use our values to define opportunities for our members and our community.

- *Continue to strive in all areas of advocacy and public policy on behalf of our members and the community we serve. Focus on RPAC, education, fundraising, grants, community outreach and other areas of influence in all things real estate related or impacted*
- *Focus on delivering a platform of professionalism. Enhance the opportunities and outreach of C2EX, work directly with brokers to engage them in the benefits for them and through them, their members*
- *Enhance opportunities for education through value of speakers and trainers, including through delivery platforms to better engage members and change results*
- *Promote the REALTORS® Code of Ethics and why it matters to both your members and the communities they serve*
- *Dramatically increase outreach opportunities and education platforms to connect and grow value to/from members in all aspects of education*
- *Seek improved ways to expand diversity within the Association at all levels. The world has changed, and continues to change, which creates excellent opportunities to grow in areas otherwise never before tapped*
- *Better tap into the various community and Association partnership opportunities (like CEP, institutes, societies, and councils) to develop and or create new avenues towards future partnerships to enhance member and community value*
- *Focus on member outreach not simply one-way communication. Engage the members through creative solutions, and in various ways. Provide value through engagement to eliminate the issues of “filling seats” at the volunteer level*
- *Work with entire leadership team to develop the P/R messaging to send to staff for promotion, and the WiiFM for membership, especially brokers—develop this as a massive opportunity promoted in the right way, to further encourage involvement and openness, especially from your areas largest brokerages*
- *Develop or update your nominating process to engage future leaders and those from the Leadership Academy in ways that promote the value of being involved, and staying involved*
- *Rename/repurpose existing communities as may be needed to create excitement around volunteering vs. doing what you always have done expecting different results*

# Core Standards

NAR required Core Standards and how staff under the leadership of the CEO ensures the following requirements are met. These are critical functions of the Association, and all areas are to be properly delegated to leadership, committees, and/or staff as needed:

1. *Advocacy*
  - a. *We will research new programs to create above the line dues billing*
  - b. *Lead and communicate the value of investing and promoting RPAC*
  - c. *Promote participation in NAR Calls for Action*
  - d. *Engage in statewide calls for action when applicable*
  - e. *Provide a method for advocacy engagement for our Association*
2. *Consumer Outreach*
  - a. *Continue to enhance opportunities as the Voice for Real Estate*
  - b. *Promote our community involvement activities each year*
  - c. *Engage the public in legislative issues*
  - d. *Expand promotion of our role in community programs including fundraising*
3. *Code of Ethics*
  - a. *Provide new and continuing education classes on the Code of Ethics*
  - b. *Have a viable Professional Standards process*
  - c. *Include a link on our website to NAR Code of Ethics*
  - d. *Understand and provide mediation and ombudsman services*
4. *Unification Efforts*
  - a. *Our bylaws are reviewed every year*
  - b. *Provide access to legal counsel*
  - c. *Policies and procedures in place including filings as required by state laws*
  - d. *Strategic and Business plans include an advocacy component*
  - e. *Association Executive completes more than 6 hours of CE/year*
5. *Technology*
  - a. *Have an interactive website*
  - b. *Have multiple Association e-mail accounts and access*
6. *Financial Solvency*
  - a. *Have strong policies in place to ensure integrity of our operations*
  - b. *Do complete an annual review*

Amendment to OMCAR Strategic Plan for 2021 and Beyond:

**Commitment to Diversity, Equity, Inclusion and Fair Housing**. The Ocala Marion County Association of REALTORS® will make a commitment to Diversity, Equity, Inclusion and Fair Housing through the following efforts: 1.) Expanding the education opportunities to ensure members have access to as many tools and resources regarding diversity, equity, inclusion. 2.) Partner with Institutes, Councils and multi-cultural groups to hold Fair Housing activities to reach as many members as possible while embracing the National Association of REALTORS® desire for associations to share. 3.) Perform an internal annual assessment to ensure OMCAR is keeping its commitment to Diversity, Equity, Inclusion and Fair Housing.

