

## NSBAR Strategic Plan: 2004

**VISION: "To be the ultimate resource for REALTORS<sup>â</sup> and the communities they serve."**

### 1: PROFESSIONAL CONDUCT & ETIQUETTE

**Objective 1A** Promote the NAR's Code of Ethics.

- Make members aware that every four years a Code of Ethics course is required.  
*(a postcard was sent to every member)*
- Issue NAR Code of Ethics to DR's for distribution and responsibility for adherence.  
*(not needed since it was in the NAR magazine)*
- Provide written notice to all DR's of their direct responsibility and liability for agents' conduct and hold open discussion at Broker forums.

**Objective 1B** Develop a civility pledge to be endorsed by all brokers and to be signed by each member.

- Establish guidelines for handling buyers and sellers in a multiple offer situation.

*(done)*

<http://www.nsbar.org/multipleoffers.htm>

- Promote the obligation for use of dispute resolution among the membership.

**Objective 1C** Eliminate grievance and replace with a mandatory meeting with the Ombudsman.

- Establish 2 hearing panels to oversee dispute resolution.
- Continuing compulsory training for standardized panels to be attended every 2 years.

**Objective 1D** Develop Uniform Business Practices and Minimum Standards

*(This is being worked on by the Big Boards around the country and we are participating)*

### 2: PROFESSIONAL DEVELOPMENT

**Objective 2A** Continue providing our members with information on legal issues and keep them current through the use of periodic legal updates.

- Develop distance learning courses (home study and online).
- Continue Broker Roundtable by email and fax.
- Promote IAR "Legal Hotline."
- Promote realtor.org.
- Solicit member comments on current and proposed standard forms.
- Revisions to or implementation of new forms as necessary.
- Conduct seminars for members, other professionals and the public.

**Objective 2B** Continue providing risk management/risk-shifting information for all members.

**Objective 2C** Continue offering designation courses and skills training.

- Offer designation courses such as GRI, CRB, CRS, ABR, etc. locally.
- Offer salesmanship and marketing programs.
- Promote public awareness of designations.

**Objective 2D** Continue providing a quality orientation course - Jump Start.

- Develop online Q&A resource for new members.
- Continue surveying to determine course/instructor strengths and weaknesses.
- Using the survey, propose changes to the content, instructors, and method of delivery.

- Consider an orientation for new Designated REALTORS®

**Objective 2E** Continue providing education courses to meet state licensing requirements.

- Pre-license courses.

**Objective 2F** Continue to educate the real estate Secretaries and Personal Assistants on matters of procedural or legal importance.

- Develop Secretary/P.A. workshops.
- Create designation program for personal assistants.
- Develop surveys to enhance this service.

### 3: TECHNOLOGY & INFORMATION

**Objective 3A** Identify and provide needed technology training.

- At office
- At local member offices. Programs designed either (a) globally, or (b) specific to their requirement.
- One-on-one.
- Local community location for the general public?

**Objective 3B** Manage Technology to Increase Profitability

- Software selection and training.
- Reviews.
- Hardware.
- Use of e-mail.

**Objective 3C** Survey membership regarding skill-level, needs, wants, etc. to get direction for programs.

**Objective 3D** Generate and promote a resource list of useful links to agents.

- Develop a plan to introduce members to our website as a resource. *(reviewed at Jump Start and other classes and Liaison notes references pages [http://www.nsbar.org/liaison\\_news.htm](http://www.nsbar.org/liaison_news.htm)*

**Objective 3E** Provide information on evolving online transaction management tools.

- Forms to fill out online. *(offered in Acrobat and new Formatta)*
- Forms to e-mail online. *(Formatta can do this)*

### 4: ADVOCACY/LEGISLATIVE

**Objective 4A** Identify key legislative and regulatory issues.

**Objective 4B** Educate, inform and involve the general membership and public when appropriate, on key legislative and regulatory issues.

- Issues mobilization - get members involved when issues arise.
- Continue to build a grassroots network.

**Objective 4C** Provide assistance to local government at the formulation point on legislative issues affecting real estate.

**Objective 4D** Coordinate efforts with other organizations and associations with similar interests.

- Establish a working group with other boards and associations on matters of interest.

**Objective 4E** Establish alliances with other groups having mutual interests.

- Examine/consider business alliances.
- Develop issues - specific alliances.
- Initiate meetings with other local associations' government affairs committees.

**Objective 4F** Continue an effective RPAC program.

### 5: MARKETING & COMMUNICATION

**Objective 5A** Consider an independent audit of our present marketing and communications.

**Objective 5B** Provide effective external communication and marketing programs.

- Create budget for real estate awareness campaign. Defer to NAR.

- Public education on the value of using a REALTOR®
- Support REALTOR® image advertising (check all publications). Explore multi-media image enhancement campaign.
- Regular press releases and interviews (insurance, coastal regulations, property rights).
- www.nsbar.com (public side). *(see public side of web)*

**Objective 5C** Provide effective internal communication programs including Terry on a CD.

- Internal publications, e.g., Newsletter, Broker Roundtable.
- Survey the members for ideas, needs, suggestions. Design a continuous process for evaluating “what” the member wants and evaluate what we have that is no longer necessary. Survey members every 2-3 years.
- Conduct member survey prior to annual strategic planning review.
- Increase member awareness of the services and benefits provided by NSBAR.
- Develop an Internet e-mail list - 80% by the end of the year.
- Announce key events - Broker Roundtable, sales meetings.

**Objective 5D** Have awareness and promotion of NSBAR website for Realtors and consumers.

- Using surveys and focus groups, continuously revise the website to ensure it provides relevant information.
- Legal articles, continuing education registration, Q&A, membership applications, Code of Ethics, arbitration guidelines, calendar of events, Store orders, legislative/regulatory issues.

**Objective 5E** Consider hiring a Communications Manager.

## 6: ASSOCIATION OPERATIONS

**Objective 6A** Ensure that the Association has qualified personnel and effective human resource management.

- Develop updated policies and procedures.
- Develop updated staff and CEO job descriptions.
- Conduct annual staff and CEO performance evaluations.

**Objective 6B** Continue effective planning.

- Annual updates to vision and plan.
- Implement a mechanism to check that action items are completed.
- Set priorities and define them more clearly.

**Objective 6C** Operate an effective organization using the NAR model guidelines for the Association Leadership Model

**Objective 6D** Implement a leadership development plan.

- Contract with a consultant to prepare and develop a comprehensive leadership development program to identify and nurture new leadership for the Association.

**Objective 6E** Explore development of other revenue sources, i.e., digitizing databases and a pre-licensing school.

**Objective 6F** Develop a plan for continued operations in the event of loss of membership.

Goal 1: Terry Penza review Disaster Plan by 3/3/04.

Goal 2: At the 3/3/04 Directors meeting Assign a Task Force to develop a plan to encourage members to remain and to define the services desired by various levels of membership.

Action Step 1: Assign the Task Force and a responsible leader.

Action Step 2: Clearly define its role in fact finding and delivering its recommendations by a certain date.

#### Suggestions for staff

1. Develop programs, products and services based on member's time and not our time
2. Redesign the web page to look more professional
  - a. Spend more money on it
  - b. Use some outside help to develop and use the latest technology
3. Sell 50,000 EasyShow lock boxes
  - a. Have a booth at the 2 NAR meetings
    - i. Develop professional booth
    - ii. Develop professional marketing pieces
  - b. Work towards a profit so we can hire a professional to market to boxes
4. Find a way to work on more local government issues that affect the membership.
5. Hire a Marketing consultant
  - a. NSBAR
  - b. EasyShow
6. Find new ways to communicate to the members
  - a. Must focus on why they should remain a member of the Board no matter where they buy MLS services
  - b. We have a wide array of current programs, products and services but no one knows about them
  - c. Is the newsletter the best way to communicate?
7. Create a staff environment where the departments have enough power to produce their own programs, products and services – within budget and hopefully generate income for NSBAR.
8. Find that magic way to recreate the old membership meetings which offered networking, education and worth of the association.
9. Mentor match up with new members
10. Auto discounts with area auto dealers