

# YOUNGSTOWN COLUMBIANA ASSOCIATION OF REALTORS®

## STRATEGIC PLAN

The following is the strategic plan for the Youngstown Columbiana Association of REALTORS®. It addresses the National Association of REALTOR'S New Core Standards and includes additional initiatives. It will be reviewed and approved annually by the YCAR Board of Directors and submitted to NAR for approval.

### VISION

YCAR does not currently have a form a Vision Statement but plans to create one.

#### ***Action item:***

Draft and approve a Vision Statement for YCAR, including reference to YCAR being the Voice for the Real Estate Profession and Property Owners. Collecting samples from other associations and companies and reviewing available information on the NAR website will help initiate this effort.

*Beginning draft: YCAR's Vision is to be of valuable service to enhance the success of our members and serve as the Voice for Real Estate in the Mahoning Valley.*

### MISSION

Current Mission Statement:

The mission of the Youngstown Columbiana Association of REALTORS® is to serve its members by protecting and enhancing the members' rights; by monitoring compliance with professional standards thus enabling members to serve the public in a competent and ethical manner; by expanding legislative influence to promote and protect private property rights for the benefit of the real estate marketplace.

***Action item:***

Review and edit/update Mission Statement, using samples from other associations and information on the National Association REALTORS® and/or the Ohio Association of REALTORS® websites as additional input.

**CORE VALUES**

YCAR does not currently have a set of written Core Values but intends to identify and communicate them.

***Action item:***

Explore Core Values of other REALTOR® associations and create a set for YCAR. The Core Values may include but not be limited to Professionalism, Respect, Service, Engagement and Community Support.

**OVERALL ASSOCIATION OBJECTIVES**

The Youngstown Columbiana Association of REALTORS® fully embraces and supports the objectives written our bylaws, including to:

- Unite those engaged in the recognized branches of the real estate profession for the purpose of exerting a beneficial influence upon the profession and related interests.
- 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®.
- Provide a unified medium for real estate owners and those engaged in the real estate profession, whereby their interests may be safeguarded and advanced.
- Further the interests of home and other real property ownership.
- Unite those engaged in the real estate profession in this community with the Ohio Association of REALTORS® and the National Association of REALTORS®, thereby furthering their own objectives throughout the state and nation, and obtaining the benefits and privileges of membership therein.
- Designate, for the benefit on the public, those individuals authorized to use the terms REALTOR® and REALTORS® as licensed, prescribed and controlled by the National Association of REALTORS®.

**SECTION 1: CODE OF ETHICS and PROFESSIONALISM**

**Objective 1: YCAR actively promotes and presents the NAR Code of Ethics to both new and existing members.**

***Action Items:***

- Continue providing Code of Ethics training to all new members as part of YCAR's regular monthly New Member Orientation sessions as a condition of membership.
- Provide Code of Ethics courses to all members, including both onsite and online options and actively promoting the courses via website, newsletter and social media.
- Actively promote the Code of Ethics requirements to all members, with added emphasis in the last year of the cycle. Inform members of changes to the schedule for Code of Ethics training requirements at the time of that transition.
- Continue featuring NAR's [Pathways to Professionalism](#) to the YCAR website and promote it in the YCAR newsletter with click-through to the actual document posted on the YCAR website.
- Incorporate information from the "[Legal Pulse](#)" (Now called "The Buzz") area of the Law, Policy and Ethics section of the NAR website into the YCAR newsletter and website.

**Objective 2: Assure the professional and proper enforcement of the Code of Ethics through the Grievance/Professional Standards/Arbitration process.*****Action Items:***

- Provide member and consumer access to both grievance/professional standards/arbitration process information and related forms via posted links and documents on the YCAR website.
- Provide grievance/professional standards/arbitration process training to all related committee members and the YCAR board of directors to assure proper knowledge and implementation of the process.
- Continue providing mediation services through YCAR and explore training of additional mediators.
- Explore the value of the Ombudsman program and consider implementation of the service as part of YCAR's operation.
- Investigate the establishment of a Citation program in cooperation with the Ohio Association of REALTORS® and promote awareness if/when it is established.
- Review and renew Code of Ethics Cooperative Enforcement Agreement annually.

## **SECTION 2: ADVOCACY**

**OBJECTIVE 1: YCAR actively engages in political fundraising and expects to exceed its assigned RPAC goal annually.**

### ***Action Items:***

- YCAR includes a recommended “above the line” suggested RPAC donation on all dues billing. The amount is determined annually by the Board of Directors – prior to posting of following year invoices.
- Publish/print YCAR branded materials highlighting the value of investing – possibly using templates available through NAR. Printed copies will be distributed to members on an annual basis, and a digital version posted on the YCAR website.
- All YCAR directors, committee chairs, other leaders and staff are encouraged to give significantly and annually to RPAC.
- Include both state and national information (in addition to similar local information) on RPAC influence, value and accomplishments on the YCAR website and in an YCAR monthly electronic newsletter specifically focused on RPAC and legislative information.
- Update RPAC information in the Legislative/RPAC section of the YCAR website at least quarterly to show progress, accomplishment and impact.

**OBJECTIVE 2: YCAR actively engages in political advocacy with and through our members and is influential with elected officials, media sources and the public.**

### ***Action Items:***

- Initiate promotion of the [NAR Broker Involvement Program](#) and encourage all brokers to engage.
- Initiate and/or build on current relationships with local, state and national government elected and appointed officials in our service area.
- Establish and cultivate relationships with multiple local organizations for potential coalition-building to address key issues (Chamber of Commerce, Homebuilders Association, Mortgage Bankers Association, Appraisers Association, etc.)
- Use relationships with local media sources to solicit 2-4 “op-ed” articles or interviews annually on important local or regional issues – and, when those articles appear, actively promote them to members through newsletter and social media.
- Equip the Chief Executive Officer with clear Legislative/RPAC talking points to share effectively during visits to member offices.

## **SECTION 3: CONSUMER OUTREACH AND ENGAGEMENT**

**OBJECTIVE 1: YCAR is the voice for real estate for members and the public in the community we serve.**

### ***Action Items:***

- Distribute contact information for YCAR President/Spokesperson to area (regional) traditional media – including both print and broadcast - annually (December/January).
- Schedule personal meetings (breakfast, lunch, etc.) for the President and AE with high-ranking leaders, as well as reporters, at all area media outlets annually. This is intended to be done near the time of installation so that media sources know the new spokesperson for the association.
- Prepare talking points for President/Spokesperson to use in cooperation with release of monthly home sales data. Contact local media sources (print and broadcast) when data is released each month to solicit comment/interview opportunities.
- Develop and maintain an active and complete list of media contacts representing print and broadcast media throughout the YCAR service area.
- In addition to media distribution, assure delivery of monthly home sales news to extended list of community leaders, including but not limited to elected officials and Chamber of Commerce leaders (both elected and senior staff leaders).
- YCAR officers, directors and other leaders are announced to members and the public (via media) annually following installation, and highlighted on the website, stationary, social media and other association communication.
- Explore cost of media training for Executive Committee members and consider providing training annually.

**OBJECTIVE 2: YCAR promotes the REALTOR® value proposition and highlights the engagement of the association and its members in the community.**

### ***Action Items:***

- Use NAR consumer advertising campaign materials, such as web banners, on the YCAR website and highlight them in member newsletter(s).
- Gather information from YCAR members on their personal involvement(s) in community service organizations for use in posting on the website and possibly advertising in traditional media. Intent is to note the organizations in which REALTOR® members are involved – not the members themselves.
- Solicit media opportunities and attention (articles, op-ed pieces and photos) highlighting community service efforts of the association and its members.

- Include a “corporate paragraph” on all news releases highlighting the value of the association and the value of a REALTOR®.
- Explore creating a value-focused advertising campaign. (Possible approach includes using the REALTOR® “R” in works like seRvice, pRofessionalism, etc.)

**OBJECTIVE 3: YCAR uses its influence in the community to engage the public in issues impacting property rights, property ownership, real estate investment and community improvement.**

***Action Items:***

- Initiate an annual “Register to Vote” campaign and consider creating a coalition to help publicize and promote the effort. Also, explore use of NAR grant and/or RPAC funds for this initiative.
- Solicit media opportunities to highlight REALTOR® positions on key community issues when appropriate (and pending that positions are approved by the Board of Directors).
- Establish or strengthen relationships with media and local politically active organizations (Homebuilders, Mortgage Bankers, Chamber of Commerce, etc.) for potential collaborative efforts.

**OBJECTIVE 4: YCAR invests in the improvement of the community we serve with funds, effort and other resources.**

***Action Items:***

- Continue ongoing support of local soup kitchen and homeless shelter with volunteer efforts.
- Explore at least two community service organizations - including but not limited to the President's charity relationship in place for this year - for possible extended (perhaps 3 years) member involvement and financial support.

**SECTION 4: UNIFICATION and SUPPORT OF THE REALTOR® ORGANIZATION**

**OBJECTIVE 1: YCAR is governed well and professionally administered such that we are in compliance with state and national standards and support of state and national efforts.**

***Action Items:***

- YCAR maintains an ongoing relationship with legal counsel and reviews the relationship annually.

- All of YCAR's corporate documents, including state and federal documents, taxes, NAR compliance information, and other financial documents are current and reviewed annually.
- A current strategic plan is on file and in place and reviewed consistently (minimum quarterly) for progress on current initiatives. The plan is considered and approved by the board and updated versions submitted to NAR annually for approval as required by their standards.
- The YCAR Association Executive takes a minimum of 6 hours of approved professional development training annually, through the state and/or national association.
- YCAR is supportive of both the state and national associations, with active links on the YCAR website, regular and substantive information in our electronic newsletters (both membership and legislative), in social media and consistently mention at all membership meetings.
- YCAR will explore the possibility of adjusting the association's bylaws to empower electronic voting.

## **SECTION 5: TECHNOLOGY**

**OBJECTIVE 1: YCAR uses current technology to communicate with and support our members.**

### ***Action Items:***

- YCAR maintains and constantly updates a membership website which includes connecting links to information on the NAR and OAR websites and other key sources.
- YCAR will do a review of our website comparing it with other REALTOR® association sites and other organization sites to find progressive improvement opportunities.
- YCAR has a planned system of electronic newsletters to provide key information to members.
- Use national & state videos and information regularly on the YCAR website and in newsletters, social media communications and explore creating and using local video material.

## **SECTION 6: FINANCIAL SOLVENCY ASSOCIATION GOVERNANCE**

**OBJECTIVE 1: YCAR has complete and current policies and corporate positioning information.**

***Action Items:***

YCAR will review and adjust or create policies for the following areas, and update them annually as needed:

- Fraud Awareness
- Budgeting
- Dues Collection
- Financial Information Disclosure
- Travel
- Investing
- Reserve Levels
- Payment
- Compliance Reporting
- Compensation
- Revenue Recognition
- Asset Capitalization
- Financial Reporting
- Conflicts of Interest
- Whistleblowers
- Document Retention

**OBJECTIVE 2: YCAR is financially solvent and successful.*****Action item:***

- The financial condition of the association is reviewed through a full and complete review done annually by an external, objective CPA firm.
- Explore the cost and value of doing an audit review annually, with a full audit done every third year.

**OBJECTIVE 3: YCAR has a board of directors fully aware of and engaged in the governance and leadership of the association.*****Action Items:***

- YCAR will create a document of fundamental board expectations that includes, but is not limited to RPAC giving, board meeting attendance, member function attendance, and support of association community investment activity. This is for use with current and prospective board members.
- A board of directors' orientation session is held each new year, after new board members are installed, to review roles, responsibilities and plans at the annual Leadership Retreat.



- The YCAR board meets monthly and at least two of those meetings will be planned with personal/social time following the meeting so that board members can build the best working relationships.
- The YCAR board, at each meeting, signs and sends appreciation notes to community and/or association people deserving of recognition.
- YCAR leadership celebrates the service of its members (committees, task forces, etc.) with a “Service Celebration” reception or similar event annually.
- YCAR leaders are visible and known by YCAR members and by the community we serve.
- Beginning with 2015, service opportunities on Presidential Advisory Groups and Task Forces will be used to attract more and different members into serving the association.
- Explore the establishment of a YCAR Leadership Academy, using possibly four half-day sessions (and various locations) to bring potential future leaders to a place of understanding and engagement in the association.

## **SECTION 7: MEMBERS/BROKERS**

Serving our members, brokers, and homeowners continues to be the highest priority of the association.

### ***Action items:***

- Semi-annual value-driven meetings engaging direct conversations with managing brokers will be established using all board members and the Chief Executive Officer. This may include, but is not limited to, special speakers (political, community, etc), special presentations, unique class offerings and listening sessions. These meetings may create opportunities to promote the association and its work and value.
- The YCAR President provides an in-person welcome at all new member orientation classes. A substitute elected leader acts as stand-in when necessary, but a brief welcome video by the President is also available for use.
- YCAR holds a Past Presidents Council luncheon annually to promote continued participation in the organization.
- YCAR will continue being the provider, as well as host, for a full schedule of professional development courses and experiences.
- Members will be surveyed twice annually on topics from education/professional development to political advocacy and events, so the leaders can best understand the interests, concerns and preferences of those members. This will be done through an electronic survey provider such as SurveyMonkey, MyEmma, etc.

- An annual sponsorship program based on providing different levels of investment and involvement will be explored.
- YCAR will create a Diversity, Equity & Inclusion (DEI) committee that will monitor and promote DEI to the membership. YCAR will promote a DEI activity to the membership annually.

## **SECTION 8: COMMUNICATIONS**

**OBJECTIVE: YCAR uses a system of communications to remain visible and relevant to members and to the community we serve.**

### ***Action Items:***

- YCAR maintains an attractive and information-rich [website](#) primarily for members, but with some consumer information available.
- In addition to YCAR member information, the YCAR website features active links and positive information about both the state and national association.
- YCAR has a system of high-quality electronic newsletters with short articles and many “click-through” links. The newsletter(s) will feature association news, legislative updates and professional development opportunities.
- YCAR has a current and complete list of media contacts for all local/regional traditional media outlets.
- YCAR uses social media is a key component of the YCAR communications efforts, using it to connect both directly to members and other “friends.” And, YCAR solicits use of its material on the social media of members, affiliates and others in the community.
- YCAR is exploring the increased use of video on our website, in our newsletters and in other ways. That includes use of videos provided by the state and national associations and production of our own material.
- YCAR uses a series of news releases to consistently provide valuable information to our members and the news media. The monthly home sales news release serves as the centerpiece of our media communications efforts.
- YCAR has and maintains personal relationships with key media leaders and reporters through our service area.

This Certification will be included at the end of the Strategic or Business Plan

### Strategic/Business Plan Certification

This Strategic/Business 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: 12/9/21

President/Chairman's signature

Date: 12/9/21

President-Elect/Chairman's Elect signature

Date: 12/9/21

Association Executive's signature

Date: 12/9/21