



**New Castle County Board of REALTORS®
2017-2020 Strategic Plan**

“Strengthening Our Community Through Home Ownership”

Vision Statement:

To provide service and tools that will allow our members to assist the public in achieving the goals of home ownership and advocating for its members and community.

Mission Statement:

The Mission of the New Castle County Board of Realtors is to add value to its members and to engage with the community. Value to members is achieved through a variety of services, leadership and ethics training, and fostering effective partnerships. Engagement with the community is achieved through volunteerism, fundraising and advocacy. Our core beliefs are based upon the REALTOR® Code of Ethics.

Financial Solvency/ Association Management			
Objective	Action Plan	Status	RESPONSIBILITY
Effective financial plan is in place for association.	A. Develop a financial review/ orientation for all newly elected volunteer leaders.		CFO
	B. Review financial policies and procedures with full Board of Directors on an annual basis.		CFO
	C. Annual financial statements are reviewed by outside accounting firm in accordance with NAR standards.		CEO/ CFO
	D. Budget and finance committees review and recommends an annual budget to the Board of Directors.		Board President
Ensure decision making is linked to Strategic Plan.	A. Review the objectives, action plan, and status of all strategic initiatives on a bi-annual basis with Board of Directors.		Board President/ Plan Monitor
	B. Post Strategic Plan on website for members to view.		CEO

Code of Ethics

Objective	Action Plan	Status	RESPONSIBILITY
Champion the National Association of REALTORS® Code of Ethics and the expectation of exemplary ethical conduct.	<ul style="list-style-type: none"> Provide both new and continuing education classes on the Code of Ethics 		CEO
	<ul style="list-style-type: none"> Conduct office and broker visits to promote the Code of Ethics and Professional Standards Processes. 		Not Identified
	<ul style="list-style-type: none"> Provide quality training to three individuals to join the Grievance and Professional Standards Committee. This will ensure that complaints are reviewed properly and disciplines are raised to a higher level to give credibility to the process. 		Professional Standards Committee/ CEO
	<ul style="list-style-type: none"> Appoint ad hoc committee to review and offer recommendations on the association's Ombudsman program. Recruit and train three new volunteers to serve in this capacity. 		Professional Standards Committee/ CEO

Unification Efforts and Support of the REALTOR® Organization

Objective	Action Plan	Status	RESPONSIBILITY
Develop Performance Policy for Association Staff.	<ul style="list-style-type: none"> Develop policy manual for Board President which includes critical employment info for association staff. 		CEO/ Board President
	<ul style="list-style-type: none"> By January 30th of every year, develop a CEO progress report based off of association and individual performance. 		Board President
	<ul style="list-style-type: none"> Conduct annual performance reviews for CEO and staff on or before December 1st. Conduct mid-year reviews on or before June 1st. 		CEO/ Board President/ Committee Chairpersons

Comply with NAR standards as it relates to Unification Efforts.	<ul style="list-style-type: none"> Review association bylaws on an annual basis. 		Board of Directors
	<ul style="list-style-type: none"> Provide access to legal counsel. 		Board of Directors/ CEO
	<ul style="list-style-type: none"> Comply with established policies and procedures in place including filings as required by state laws. 		Board of Directors/ CEO
	<ul style="list-style-type: none"> Encourage and document continuing education for Association Executive. 		Board of Directors

Consumer Outreach

Objective	Action Plan	Status	RESPONSIBILITY
Strengthen the community through home ownership by promoting market statistics and/or real estate trends in issues and their impact on the consumer.	<ul style="list-style-type: none"> Highlight local real estate data in a news release or through direct 		Association Staff
	<ul style="list-style-type: none"> Use social media to share local real estate data insights. 		Association Staff
Partner with Brokers to promote the resources, activities, and programs of the association.	<ul style="list-style-type: none"> Conduct one quarterly broker engagement activity (site visit, attendance at sales meeting, etc.) 		Board of Directors
	<ul style="list-style-type: none"> Broker office visits to explain services and benefits available for agents 		Board of Directors/ CEO
	<ul style="list-style-type: none"> Communicate with Brokers on key political issues affecting the real estate industry. 		Board of Directors/ CEO
	<ul style="list-style-type: none"> Collect input from brokers and top producing agents regarding market trends and education opportunities. 		Board of Directors/ CEO
Positively impact the community through initiatives led by REALTORS®	<ul style="list-style-type: none"> Appoint taskforce to evaluate and strategically coordinate fund raising efforts and philanthropic giving of the association. 		Board of Directors

	<ul style="list-style-type: none"> Position REALTORS® and the association as a positive force through service projects within the community. 		Board of Directors/ Staff
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Advocacy

Objective	Action Plan	Status	RESPONSIBILITY
Support property rights, housing, and property ownership at the state and local level.	<ul style="list-style-type: none"> Analyze, author and/or impact proposed legislation and regulations. 		Public Policy Committee/ Board of Directors
	<ul style="list-style-type: none"> Maximize REALTOR® investments for the protection of private property rights and free enterprise. 		Public Policy Committee
	<ul style="list-style-type: none"> Distribute resources to impact the political process at the state and local level. 		Public Policy Committee
	<ul style="list-style-type: none"> Increase participation in Delaware Association of Realtors® Legislative Action Day by 50%. 		Public Policy Committee
	<ul style="list-style-type: none"> Ensure that full Board of Directors have downloaded and use the REALTOR® Action Center App. Promote App and Calls for Action through website and other communication channels. 		Board of Directors
	<ul style="list-style-type: none"> Promote REALTOR® Action Center App and Calls for Action through website and other communication channels. 		Public Policy Committee
Be a leader in RPAC locally and at the state level; utilize member services to remain influential and further the business interests of our members.	<ul style="list-style-type: none"> Raise 100% of the established RPAC Goal. 		Public Policy Committee
	<ul style="list-style-type: none"> Encourage Board of Directors, Committee Chairs and Managing Brokers to contribute above the fair share level. 		Public Policy Committee
	<ul style="list-style-type: none"> Increase RPAC donations by 100% in over the span of the three-year planning cycle. 		Public Policy Committee

	<ul style="list-style-type: none"> • Increase Broker participation in RPAC by 25% each year. 		
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Technology

Objective	Action Plan	Status	RESPONSIBILITY
Examine technology systems of association with the goal of increasing productivity, efficiency, and service to members.	<ul style="list-style-type: none"> • Allocate funds in budget for new hardware and updated software. 		Board of Directors/ CFO
	<ul style="list-style-type: none"> • Invest in additional technologies to support and advance association functions. 		Board of Directors/ CFO
	<ul style="list-style-type: none"> • Introduce technology training as applicable for membership. 		Association Staff