



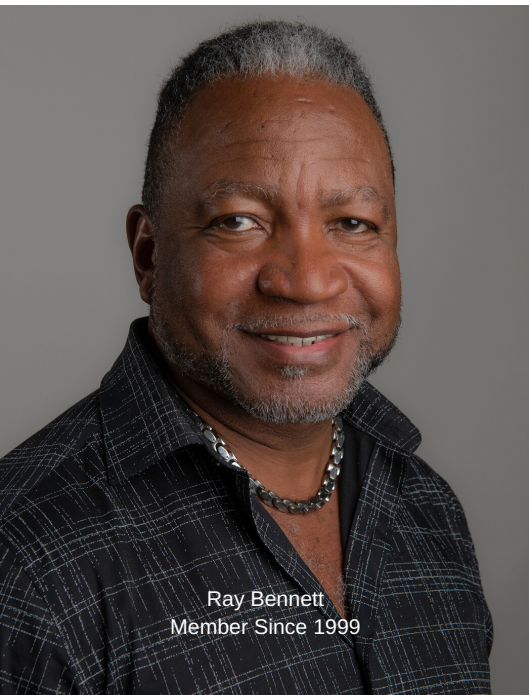
Vivian Vance
Member Since 1992



Keosha Kirven
Member Since 2020



Joe Livingston
Member Since 1978



Ray Bennett
Member Since 1999



Liz McMorris
Member Since 1996




METROTEX
Association of REALTORS®

STRATEGIC PLAN 2021

INFLUENCE, INFLUENCE, INFLUENCE



METROTEX
Association of REALTORS®

2021 STRATEGIC PLAN

Approved May 28, 2020

Our Core Values

- Purpose & Growth - our Association is built on our purpose, mission and dedication to serve our members.
- Member Focus - a razor-sharp focus on our members needs with member profitability as an essential element.
- Integrity - to have honesty and respect for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.
- Professionalism - to be professional in our actions to our member, partners and each other.
- Excellence - to continually pursue knowledge and learn.
- Community Service - to effectively help organizations to make an impact in the communities they serve.
- Fun - to have enjoyment and fulfillment in our work.
- We respond, recover, thrive and adapt.

AREA 1

PURPOSE

Professional Development: MetroTex has a culture of exceptional programming which advances the career expectations of industry and real estate professionals.

STRATEGIC OBJECTIVES

- **1A. Programming and Delivery:** We deliver a diverse spectrum of career and professional development offerings through a variety of methods which cater to the various preferences and learning styles of real estate professionals.

STRATEGIES

1A1. Satisfy compliance (TREC and NAR requirements).

1A2. Use modern tools to deliver professional development offerings.

- Live classroom
- Live virtual (Simulcast)
- Forums
- Maximize online education resources
- On-demand videos
- Social media engagement to deliver education

1A3: Include MLS training in education delivery strategies

- **1B. Trainers:** We partner with top-rated trainers who are dynamic and engaging subject matter experts.

STRATEGIES

1B1. The Association continuously recruits and retains qualified trainers that are “best in class” in their area of industry specific specialization.

1B2. Develop a list of prerequisites for instructors

1B3. Develop evaluation methods to determine the continued quality of the instructor

1B4. We value and pay industry talent to bring very high quality programs to the Association.

1B5. Instructors have the ability to evaluate their experience with the association (technology, teaching environment, student behavior management).

- **1C. Target Audience:** We anticipate and address the diverse career needs of our members and provide programming that supports their business.

STRATEGIES

1C1. We explore bundling of classes

1C2. Identify subject matter specializations such as Property Management/Leasing, Commercial, Teams, etc. and deliver classes that focus on those areas.

1C3. Conduct focus groups of current practitioners to identify market trends and create classes accordingly

1C4. Identify diverse groups to create collaboration opportunities on professional development subjects.

- **1D. Value and Market Driven:** We operate a profit-generating department in order to maximize our income streams, enabling us to provide exceptional programming and services.

STRATEGIES

1D1. Establish a needs assessment for each course:

- Establish benchmarking criteria (ex: supply and demand, true cost, how much do we need to charge to cover expenses and make a profit, delivery method, how many students are required, etc.)
- Define profitability vs value to members

1D2. Explore bundling, couponing, early bird registration, and other incentives to attract more students.

1D3. Take advantage of opportunities to cross-sell classes (ex: if taking this class, then these classes would also be good).

AREA 2

PURPOSE

Government Affairs: MetroTex is *the* recognized advocate for all the things real estate.

STRATEGIC OBJECTIVES

- **2A. Fundraising – RPAC & TREPAC:** We are a community of stakeholders who have a culture of commitment to investing in the political process.

STRATEGIES

2A1. Cross-train members and staff to be better equipped to articulate the value of an investment.

2A2. Continually hold, evaluate and improve fundraising events.

2A3. Develop possible recognition programs based on 100% office participation, competitions, etc.

2A4. Utilize a systematic approach to getting the message out (i.e. MLS meetings).

- **2B. Policy:** Our policy positions are the shield that protects property rights in our communities.

STRATEGIES

2B1. Establish MetroTex Public Policy positions.

- Create Public Policy position marketing material by using all available media outreach opportunities.

2B2. Evaluate all Government Affairs processes to ensure a timely, effective and efficient decision making process.

- **2C. Grassroots Mobilization:** Our members understand the importance of a timely response to all opportunities to engage.

STRATEGIES

2C1. Create local key contact program to elected officials.

2C2. Establish outreach and education programs for Brokers and Office Managers.

- Provide Brokers and Managers informative collateral to provide to new and tenured agents.
- Promote the wins (local, state and NAR).
- Focus on issues needing solutions.

2C3. Members are engaged and participating in the following:

- Calls to action
- Phone banks
- City Council Meetings

2C4. Utilize social media to engage with membership

2C5. Actively recruit REALTOR® candidates to run for local public offices. (City Council positions, etc.)

- **2D. Influence and Outreach:** Policy makers at all levels understand and respect our public policy positions through our REALTORS® at the table.

STRATEGIES

2D1. Establish candidate interview and review specific group.

- Reevaluate financial support decision making for candidates.

2D2. Host periodic town hall style meeting (in district) with elected officials throughout MetroTex region to discuss MetroTex Public Policy positions. (In partnership with other organizations.)

2D3. Establish annual Mayoral event to discuss MetroTex Public Policy positions.

2D4. Identify partner organizations to address and collaborate with on finding solutions to housing issues.

2D5. MetroTex becomes a solutions oriented organization on housing issues.

2D6. Exhaust all sources of funding from NAR REALTOR® Party Resources.

AREA 3

PURPOSE

Governance: MetroTex is a forward thinking business that engages members and provides extraordinary opportunities for leadership, professional growth.

STRATEGIC OBJECTIVES

- **3A. Staffing:** We are a dynamic team of professionals.

STRATEGIES

3A1. We recruit superlative talent to advance the specific objectives of our strategic plan.

3A2. We provide a compensation package that is competitive with our industry.

3A3. We embrace a culture of excellence.

- We provide a formalized onboarding and mentoring program.
- We foster an environment of teamwork and continuous training.
- We support professional growth through education.

- **3B. Facilities:** MetroTex has state of the art multi-purpose facilities designed to exceed expectations and enhance the experience for all.

STRATEGIES

3B1. Offer multi-purpose facilities that anticipate the needs of internal and external groups.

3B2. Ensure the headquarters are located in a newer fresher area that reflects an open, inviting, and professional environment.

3B3. Continually evaluate the location, need and profitability of our service centers.

3B4. Provide technology that addresses the future needs of staff and visitors.

- Technology center for members, closing rooms to conduct work while at Association for meetings.

3B5. Adhere to governmental and county orders to provide a safe and clean environment to our members, employees, and invitees.

3B6. Provide workforce strategies to members and employees so they can continue to work in any environment and circumstance.

- **3C. Financial Stewardship:** MetroTex is a fiscally responsible business that funds its strategic vision.

STRATEGIES

3C1. Evaluate sources of non-dues income, including partnering with outside vendors in order to provide income based solutions to member needs.

3C2. Oversee prudent and responsible investment policies, utilizing outside consultants to ensure we are maximizing our return.

- Analyze the structure of the Finance and Investment Committees.

- Perform an annual assessment of all programs and events offered by the Association to ensure they are financially sound and supportive of our Strategic Plan.
- **3D. Leadership Development:** MetroTex is a dynamic and responsive business structure that proactively identifies, nurtures, and cultivates the talents of members and provides a pathway to leadership.

STRATEGIES

3D1. Utilize our member talent database to fill work groups with members who have the expertise and/or passion for the topics and subject matter identified.

3D2. Outreach to our members who are actively participating in our industry so we can identify their needs and meet their expectations with products and services.

3D3. Implement formal processes to fill work groups and leadership positions that are broadly promoted, seek diversity of thought, and are inclusive and open to all wishing to serve.

- **3E. Business Collaborations:** We seek collaborative relationships with other organizations to amass diversity of thought and achieve common goals.

STRATEGIES

3E1. We are open to opportunities involving mergers, acquisitions, consolidations and partnering opportunities with other associations and industry organizations.

- We are open to exploring consolidations or joint ventures that provide operational efficiencies while being financially sound.

3E2. Identify common causes and provide solutions that include partnerships with other organizations to work toward a common solution.

3E3. Create and sustain a formal internal and external recognition program that brings wide-scale recognition to our activities.

AREA 4

PURPOSE

Community Outreach: MetroTex is dedicated to meaningful partnerships between the community and REALTORS®.

STRATEGIC OBJECTIVES

- **4A. Programs and Events:** We demonstrate, through our programs and events, that we are the trusted advisor for all thing's real estate.

STRATEGIES

- 4A1. Host events to educate the community on property ownership.
 - 4A2. Support REALTOR® organizations that empower the community.
 - a. I.E. NEHREP, VAREB, NAREB, AREA, etc.
 - 4A3. Create and use specialty groups as a resource to target specific community needs.
 - I.E. YPN, Property Management, Global, etc.
 - 4A4. Implement new tactics and priorities that will support enhanced levels of consumer commitment, increased use of new technologies, renewed commitment to innovation and a sustainable value proposition that helps the community and the planet.
- **4B. Consumer Advocacy:** We are committed to strengthening communities by educating, informing and inspiring the public to advocate on behalf of property rights.

STRATEGIES

- 4B1. Energize consumers to act.
 - 4B2. Use media to educate the community about property rights and issues.
 - 4B3. Engage with local media to become their trusted source for information.
 - 4B4. Serve as a resource for information about local candidates and issues.
- **4C. Philanthropy:** We celebrate and showcase the philanthropic efforts of our members.

STRATEGIES

- 4C1. Recognize members regularly for their philanthropic efforts.
 - 4C2. Host annual awards event for outstanding philanthropic efforts.
 - 4C3. Recommend members for state and national recognition.
 - 4C4. Survey members to determine philanthropic activity.
- **4D. Influence and Outreach:** We recognize and support members serving on outside community organizations to deliver a unified REALTOR® message.

STRATEGIES

- 4D1. Empower REALTORS® to partner with their local communities.
- 4D2. Provide educational materials to REALTORS to support their community outreach efforts.
- 4D3. Connect with brokers, owners and managers to distribute information about community outreach efforts.

4D4. Publicize member efforts to deliver the REALTOR message.

4D5. Support members in the grant application process.

4D6. Seek partnerships with entities that will enhance the continuation of knowledge and skills of our industry, to keep our members focused and a source of current news and events. Assist members in thriving in any real estate economic environment.

AREA 5

PURPOSE

Communications Purpose: MetroTex stakeholders understand and appreciate our value proposition.

STRATEGIC OBJECTIVES

- **5A. Internal:** Members benefit from the vast assortment of information channels and utilize the full spectrum of our products and services.

STRATEGIES

5A1. MetroTex provides products and services for our members.

5A2. We use segmentation to target specific membership groups.

5A3. Establish a value proposition.

5A4. Ensure the communication flows from NAR and Texas REALTORS.

- **5B. External:** The public benefits from the vast assortment of information channels we provide, and they pursue the expertise of a REALTOR®

STRATEGIES

5B1. **Extend** the new REALTORS® Brand “That’s who we Are” efforts on the local, state, and national level.

- “That’s Who We R” - national branding/”Here We R” - local branding

- **5C. Delivery Methods:** We deliver a wide array of media and modes of communication, ensuring our varied audiences get what they want, when they want it, and can easily choose how it is delivered.

STRATEGIES

5C1. Strategically define/market our points of differentiation

5C2. Define types of communication

5C3. Evaluate trends for appropriate channels of communication

- **5D. Messaging and Branding:** We manage the messaging and branding to personify the REALTOR® value proposition.

STRATEGIES

5D1. Focus REALTOR® message/branding on REALTOR® value

- Extending NAR and Texas REALTOR® messaging
- Extend our value proposition
- Market our points of differentiation

- **5E. Talent-Member Database:** We capture relevant data about our members to better utilize their talents and experiences.

STRATEGIES

5E1. Capturing data needs to be front of mind for leadership and staff

5E2. Easy for both staff and members to utilize

5E3. Utilize data to improve member experience and engagement.