



**Embracing
Change, While
Building our
Future
Together**

**MetroTex
2020 Strategic Plan**

A group of people's hands are visible, pointing at a large set of architectural blueprints spread out on a wooden table. The scene is brightly lit, and the focus is on the hands and the plans. The text "Our Vision" is overlaid on the left side of the image.

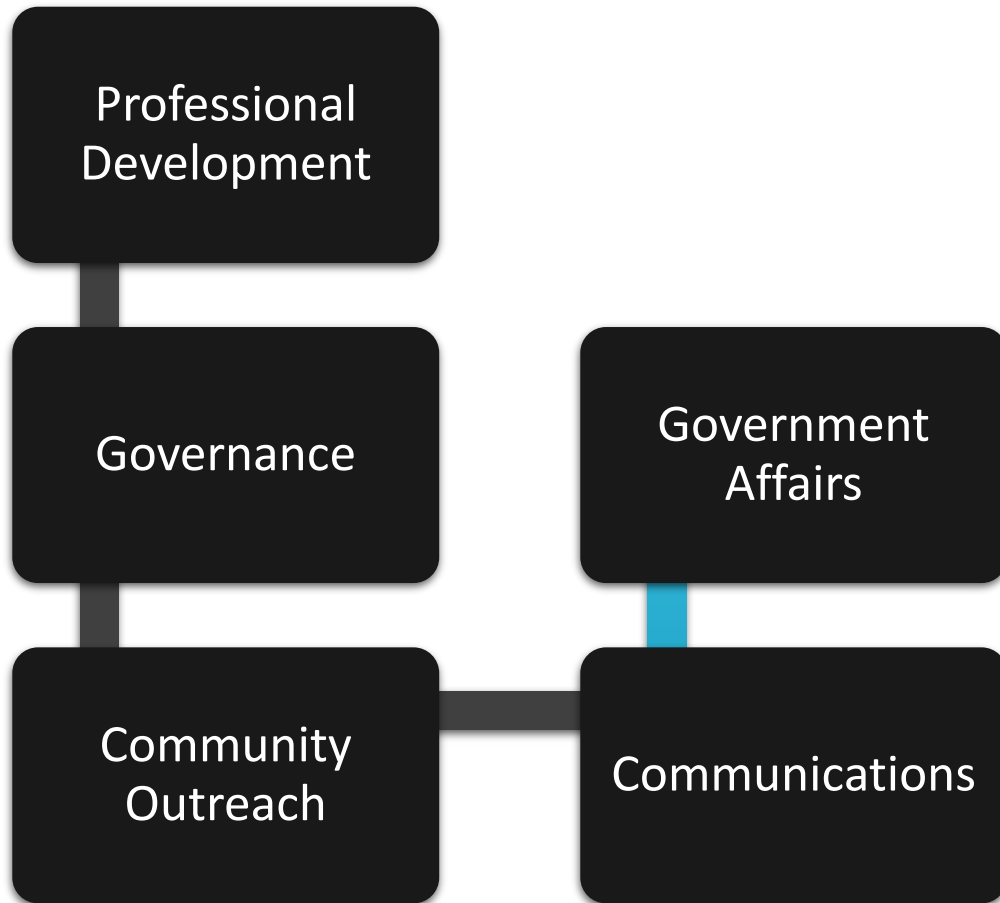
Our Vision

MetroTex is the voice and the most trusted resource for all things real estate in North Texas.

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.

Strategic Purposes



- **Professional Development** : MetroTex has a culture of exceptional programming which advances the career expectations of industry and real estate professionals.
- **Government Affairs**: MetroTex is the recognized advocate for all the things real estate.
- **Governance**: MetroTex is a forward thinking business that engages members and provides extraordinary opportunities for leadership, professional growth.
- **Community Outreach**: MetroTex is dedicated to meaningful partnerships between the community and REALTORS®.
- **Communications**: MetroTex stakeholders understand and appreciate our value proposition.

AREA 1

Professional Development

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

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.

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

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

Bundling classes

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

Implement focus groups of current practitioners to identify market trends and create classes accordingly

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.

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.

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

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

- Strategy 1B1. The Association continuously recruits and retains qualified trainers that are “best in class” in their area of industry specific specialization.
- Strategy 1B2. Develop a list of prerequisites for instructors
- Strategy 1B3. Develop evaluation methods to determine the continued quality of the instructor
- Strategy 1B4. We value and pay industry talent to bring very high quality programs to the Association.
- Strategy 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.

- Strategy 1C1. We explore bundling of classes
- Strategy 1C2. Identify subject matter specializations such as Property Management/Leasing, Commercial, Teams, etc. and deliver classes that focus on those areas.
- Strategy 1C3. Conduct focus groups of current practitioners to identify market trends and create classes accordingly
- Strategy 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.

- Strategy 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
- Strategy 1D2. Explore bundling, couponing, early bird registration, and other incentives to attract more students.
- Strategy 1D3. Take advantage of opportunities to cross-sell classes (ex: if taking this class, then these classes would also be good).

AREA 2

Government Affairs

MetroTex is the recognized advocate for all the things real estate.

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

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

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

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

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

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

- Strategy 2B1. Establish MetroTex Public Policy positions.
 - Create Public Policy position marketing material by using all available media outreach opportunities.
- Strategy 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.

- Strategy 2C1. Create local key contact program to elected officials.
- Strategy 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
- Strategy 2C3. Members are engaged and participating in the following:
 - Calls to action
 - Phone banks
 - City Council Meetings
- Strategy 2C4. Utilize social media to engage with membership

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- Strategy 2D1. Establish candidate interview and review specific group.
 - Reevaluate financial support decision making for candidates.
- Strategy 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.)
- Strategy 2D3. Establish annual Mayoral event to discuss MetroTex Public Policy positions.
- Strategy 2D4. Identify partner organizations to address and collaborate with on finding solutions to housing issues.
- Strategy 2D5. MetroTex becomes a solutions oriented organization on housing issues.
- Strategy 2D6. Exhaust all sources of funding from NAR REALTOR® Party Resources.

AREA 3

Governance

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

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

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

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

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.

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

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

- Strategy 3A1. We recruit superlative talent to advance the specific objectives of our strategic plan.
- Strategy 3A2. We provide a compensation package that is competitive with our industry.
- Strategy 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.

- Strategy 3B1. Offer multi-purpose facilities that anticipate the needs of internal and external groups.
- Strategy 3B2. Ensure the headquarters are located in a newer fresher area that reflects an open, inviting, and professional environment.
- Strategy 3B3. Continually evaluate the location, need and profitability of our service centers.
- Strategy 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.

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

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

- Strategy 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.
- Strategy 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.
- Strategy 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.

- Strategy 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.
- Strategy 3E2. Identify common causes and provide solutions that include partnerships with other organizations to work toward a common solution.
- Strategy 3E3. Create and sustain a formal internal and external recognition program that brings wide-scale recognition to our activities.

AREA 4

Community Outreach

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

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

4B. Consumer Advocacy: We are committed to strengthening community

4C. Philanthropy: We celebrate and showcase the philanthropic efforts of our members by educating, informing and inspiring the public to advocate on behalf of property rights.

4D. Influence and Outreach: We recognize and support members serving on outside community organizations to deliver a unified REALTOR® message.

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

- Strategy 4A1. Host events to educate the community on property ownership.
- Strategy 4A2. Support REALTOR® organizations that empower the community.
 - I.E. NAHREP, VAREB, NAREB, AREAAs, etc.
- Strategy 4A3. Create and use specialty groups as a resource to target specific community needs.
 - I.E. YPN, Property Management, Global, etc.

4B. Consumer Advocacy: We are committed to strengthening communities by educating, informing and inspiring the public to advocate on behalf of property rights.

- Strategy 4B1. Energize consumers to act.
- Strategy 4B2. Use media to educate the community about property rights and issues.
- Strategy 4B3. Engage with local media to become their trusted source for information.
- Strategy 4B4. Serve as a resource for information about local candidates and issues.

4C. Philanthropy: We celebrate and showcase the philanthropic efforts of our members.

- Strategy 4C1. Recognize members regularly for their philanthropic efforts.
- Strategy 4C2. Host annual awards event for outstanding philanthropic efforts.
- Strategy 4C3. Recommend members for state and national recognition.
- Strategy 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.

- Strategy 4D1. Empower REALTORS® to partner with their local communities.
- Strategy 4D2. Provide educational materials to REALTORS to support their community outreach efforts.
- Strategy 4D3. Connect with brokers, owners and managers to distribute information about community outreach efforts.
- Strategy 4D4. Publicize member efforts to deliver the REALTOR message.
- Strategy 4D5. Support members in the grant application process.

AREA 5

Communications

MetroTex stakeholders understand and appreciate our value proposition.

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

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

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.

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

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

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

- Strategy 5A1. MetroTex provides products and services for our members.
- Strategy 5A2. We use segmentation to target specific membership groups.
- Strategy 5A3. Establish a value proposition.
- Strategy 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®.

- Strategy 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.

- Strategy 5C1. Strategically define/market our points of differentiation
- Strategy 5C2. Define types of communication
- Strategy 5C3. Evaluate trends for appropriate channels of communication

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

- Strategy 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.

- Strategy 5E1. Capturing data needs to be front of mind for leadership and staff
- Strategy 5E2. Easy for both staff and members to utilize
- Strategy 5E3. Utilize data to improve member experience and engagement