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STRATEGIC PLAN 2022



2022 STRATEGIC PLAN

Approved 4/22/2021

Mission Statement

We, the members of the MetroTex Association of REALTORS®, elevate the success of our members through inclusivity, superior education, and advocacy, contributing to stronger, more vibrant communities.

Our Core Values

- **Focus on Members:** Act with a razor-sharp focus on our members' needs, with member success as an essential element of all decisions.
- **Exhibit Integrity:** Demonstrate genuine honesty and respect for all individuals.
- **Emphasize Diversity and Inclusion:** Actively promote equality, inclusion, and acceptance in all areas of our Association.
- **Drive Leadership:** Empower and inspire entrepreneurial leaders.
- **Demonstrate Professionalism:** Conduct ourselves professionally in our actions to our members, partners, and each other.
- **Pursue Excellence:** Strive continuously for increased knowledge and learning.
- **Serve Our Communities:** Support other organizations to make an impact in the communities they serve.
- **Practice Resilience:** Respond, recover, thrive, and adapt.
- **Explore Innovation and Applied Technology:** Identify and adopt new technologies to meet needs efficiently and effectively.
- **Communication and connectivity:** Provide various formats of relevant communication that foster participation and success of our members.
- **Value Time:** Respect and treasure member and staff time.
- **Experience Joy:** Have enjoyment and fulfillment in our work.
- **Build with Purpose & Growth:** Take actions rooted in our purpose, mission, and dedication to serve our members.

AREA 1

PURPOSE

Diversity, Equity and Inclusion: We establish an equitable and inclusive culture while creating space for the voices least heard and celebrating the diversity of our communities.

STRATEGIC OBJECTIVES

- **1A. Cultivate Respect:** We, the MetroTex members, pledge and commit to cultivating respect and an equitable environment for all members.

STRATEGIES

1A1. Actively and intentionally engage and involve members, volunteers, and speakers who represent the broad diversity of the real estate industry and the communities we serve.

1A2. Practice inclusion, ethical decision-making and accountability, including reporting and measuring to ensure accountability.

1A3. Provide mentorship to develop future leaders within the organization.

- **1B. Allocate Resources:** We commit resources to advancing DEI-focused educational opportunities and initiatives.
- **1C. Commitment:** We ensure that governing documents, communication channels, and the nominating and elections processes reinforce MetroTex's commitment to diversity, equity and inclusion.

AREA 2

PURPOSE

Communications: We engage in active listening and conversation with our members and the communities we serve.

STRATEGIC OBJECTIVES

- **2A. Communicate Internally:** We communicate with our members in the frequency, format, and manner they choose.

STRATEGIES

2A1. Provide products and services that meet our members' needs.

2A2. Engage our members through outreach, surveys, and opinion research.

2A3. Use segmentation to target specific membership groups.

2A4. Identify and articulate our value propositions.

2A5. Facilitate the dialog between MetroTex, NAR and Texas REALTORS®.

- **2B. Communicate Externally:** We inform the public through an assortment of information channels to convey the value of REALTORS®.

STRATEGIES

2B1. Extend the new REALTORS® Brand “That’s Who We R” efforts on the local, state, and national level.

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

- **2C. Delivery Methods:** We connect with our members. We deliver relevant communication, ensuring our varied audiences get what they want, when they want it, and can easily choose how it is delivered.

STRATEGIES

2C1. Strategically define/market our points of differentiation.

2C2. Define types of communication.

2C3. Evaluate trends for appropriate channels of communication.

2C4. Develop a REALTOR®-facing interface for a single point of engagement. (MetroTex is a one stop solution.)

- **2D. Messaging and Branding:** We manage messaging and branding to personify the REALTOR® value proposition.

STRATEGIES

2D1. Focus on REALTOR® message/branding on REALTOR® value

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

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

STRATEGIES

2E1. Capture data needs to be front of mind for leadership and staff.

2E2. Make it easy for both staff and members to utilize.

2E3. Utilize data to improve member experience and engagement.

AREA 3

PURPOSE

Professional Development: We have a culture of exceptional programming which is committed to advancing the professionalism of Realtors with the expressed purpose of improving the consumer experience.

STRATEGIC OBJECTIVES

- **3A. Programming and Delivery:** We deliver a diverse spectrum of professional development offerings through various preferences and learning styles of real estate professionals.

STRATEGIES

- 3A1. Use modern, traditional and non-traditional, innovative and efficient, tools to deliver professional development offerings.
- 3A2. Satisfy compliance (TREC and NAR requirements).
- **3B. Trainers:** We partner with top-rated trainers who are dynamic and engaging subject matter experts.

STRATEGIES

- 3B1. Continuously recruit and retain qualified trainers that are “best in class” in their area of industry specific specialization.
- 3B2. Develop a list of prerequisites for instructors.
- 3B3. Develop evaluation methods to determine the continued quality of the instructor.
- 3B4. Value and pay industry talent to bring very high quality programs to the Association.
- 3B5. Provide instructors the ability to evaluate their experience with the association (technology, teaching environment, student behavior management, diversity and inclusion).
- **3C. Target Audience:** We identify and meet the diverse professional needs of our members and provide programming that supports their business.

STRATEGIES

- 3C1. Explore bundling of classes
- 3C2. Identify subject matter specializations such as Property Management/Leasing, Commercial, Teams, etc. and deliver classes that focus on those areas.
- 3C3. Conduct focus groups of current practitioners to identify market trends and create classes accordingly
- 3C4. Identify diverse groups to create collaboration opportunities on professional development subjects.

- **3D. 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

- 3D1. 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 (Analyze benefit to member and evaluate demand)
- 3D2. Explore bundling, couponing, early bird registration, and other incentives to attract more students.
- 3D3. Take advantage of opportunities to cross-sell classes (ex: if taking this class, then these classes would also be good).

AREA 4

PURPOSE

Government Affairs: We are *the* advocate for all things real estate.

STRATEGIC OBJECTIVES

- **4A. Fundraising – RPAC & TREPAC:** Function as a community of stakeholders who are actively engaged and committed to investing in the political process.

STRATEGIES

- 4A1. Cross-train members and staff to be better equipped to articulate the value of an investment.
- 4A2. Continually hold, evaluate and improve fundraising events.
- 4A3. Develop possible recognition programs based on 100% office participation, competitions, etc.
- 4A4. Utilize a systematic approach to getting the message out (i.e. MLS meetings).
- **4B. Policy:** Our policy positions are the shield that protects property rights in our communities.

STRATEGIES

- 4B1. Establish MetroTex Public Policy positions.
 - Create Public Policy position marketing material by using all available media outreach opportunities.
- 4B2. Evaluate all Government Affairs processes to ensure a timely, effective and efficient decision making process.

- **4C. Grassroots Mobilization:** We bring our members to the table to influence decisions.

STRATEGIES

4C1. Create local key contact program to elected officials.

4C2. 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.

4C3. Engage members to participate in the following:

- Calls to action
- Phone banks
- City Council Meetings

4C4. Utilize social media to engage with membership

4C5. Actively recruit REALTOR® candidates to run for local public offices and appointed to or selected for government boards, councils and advisory groups.

- **4D. Influence and Outreach:** Policy Makers adopt our public policy positions.

STRATEGIES

4D1. Establish candidate interview and review specific group.

- Reevaluate financial support decision making for candidates.

4D2. 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.)

4D3. Establish annual Mayoral event to discuss MetroTex Public Policy positions.

4D4. Identify partner organizations to address and collaborate with on finding solutions to housing issues.

4D5. Become a solutions oriented organization on housing issues.

4D6. Maximize all sources of funding from NAR REALTOR® Party Resources.

AREA 5

PURPOSE

Governance: We are a member focused collaborative organization, which navigates the partnership between members and staff.

STRATEGIC OBJECTIVES

- **5A. Staffing:** We are a diverse, inclusive, dynamic team of professionals.

STRATEGIES

- 5A1. Recruit, encourage, and mentor superlative talent to advance the specific objectives of our strategic plan.
- 5A2. Provide an innovative compensation package that is competitive with our industry.
- 5A3. Embrace a culture of excellence.
 - Provide a progressive onboarding and mentoring program.
 - Foster a respectful environment of teamwork and appreciation for our unique differences.
 - Support professional growth through education and experience.
- 5A4. Hire the necessary expertise to fulfill the mission of the organization.
- 5A5. Seek equity, diversity and inclusion in our hiring and retention practices.

- **5B. Facilities:** We have state of the art multi-purpose facilities designed to exceed expectations and enhance the experience for all.

STRATEGIES

- 5B1. Offer multi-purpose facilities that anticipate the needs of internal and external groups.
- 5B2. Ensure the headquarters are located in a newer fresher area that reflects an open, inviting, and professional environment.
- 5B3. Continually evaluate the location, need and profitability of our service centers.
- 5B4. 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.
- 5B5. Adhere to governmental and county orders to provide a safe and clean environment to our members, employees, and invitees.
- 5B6. Provide workforce strategies to members and employees so they can continue to work in any environment and circumstance.

- **5C. Financial Stewardship:** We are a fiscally responsible business that funds its strategic vision.

STRATEGIES

- 5C1. Evaluate sources of non-dues income, including partnering with outside vendors in order to provide income based solutions to member needs.
- 5C2. 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.
 - Provide independent review of annual budget, reserves, and accounting processes.

- **5D. Leadership Development:** We are committed to identifying, nurturing and cultivating diverse and dynamic leaders.

STRATEGIES

- 5D1. 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.
- 5D2. 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.
- 5D3. Implement formal processes to fill work groups and leadership positions that are broadly promoted, seek diversity, and are inclusive and open to all wishing to serve.

- **5E. Business Collaborations:** We collaborate with other organizations to amass diversity of thought and achieve common goals.

STRATEGIES

- 5E1. Remain open to opportunities involving mergers, acquisitions, consolidations and partnering opportunities with other associations and industry organizations.
 - Remain open to exploring consolidations or joint ventures that provide operational efficiencies while being financially sound.
- 5E2. Identify common causes and provide solutions that include partnerships with other organizations to work toward a common solution.
- 5E3. Create and sustain a formal internal and external recognition program that brings wide-scale recognition to our activities.

AREA 6

PURPOSE

Community Outreach: We are partners with the community and REALTORS®.

STRATEGIC OBJECTIVES

- **6A. Programs and Events:** We demonstrate, through our programs and events, that we are the trusted advisor for all thing's real estate.

STRATEGIES

- 6A1. Host events to educate the community on property ownership.
- 6A2. Support REALTOR® organizations that empower the community. (I.E. NEHREP, VAREB, NAREB, AREAA, etc.)
- 6A3. Create and use specialty groups as a resource to target specific community needs. (I.E. YPN, Property Management, Global, etc.)
- 6A4. 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.

- **6B. Consumer Advocacy:** We are committed to strengthening communities by educating, informing and inspiring the public to advocate on behalf of property rights.

STRATEGIES

- 6B1. Energize consumers to act.
- 6B2. Use media to educate the community about property rights and issues.
- 6B3. Engage with local media to become their trusted source for information.
- 6B4. Serve as a resource for information about local candidates and issues.

- **6C. Philanthropy:** We celebrate and showcase the philanthropic efforts of our members.

STRATEGIES

- 6C1. Recognize members regularly for their philanthropic efforts.
- 6C2. Host annual awards event for outstanding philanthropic efforts.
- 6C3. Recommend members for state and national recognition.

6C4. Survey members to determine philanthropic activity.

- **6D. Influence and Outreach:** We recognize and support members serving on outside community organizations to deliver a unified REALTOR® message.

STRATEGIES

6D1. Empower REALTORS® to partner with their local communities.

6D2. Provide educational materials to REALTORS to support their community outreach efforts.

6D3. Connect with brokers, owners and managers to distribute information about community outreach efforts.

6D4. Publicize member efforts to deliver the REALTOR message.

6D5. Support members in the grant application process.

6D6. 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.