

# MIDWESTERN OHIO ASSOCIATION OF REALTORS®

## 2022 – 2024 STRATEGIC PLAN

JANUARY 12, 2022



### MISSION

*The Midwestern Ohio Association of REALTORS®:*

- *Enhances members' ability to achieve business success,*
- *Promotes ethical practices in the real estate profession,*
- *Supports advocacy for homeownership and property rights.*



### VALUES

*At all times, the Midwestern Ohio Association of REALTORS® commits to be:*

- *Member-focused*
- *Community-minded*
- *Reliable*
- *Respected*



### GOALS

**ADVOCACY:** *MOAR will provide information and education to the members, the public, and elected officials to better understand the impact of public policy and legislation on the real estate industry.*

**PROFESSIONALISM:** *MOAR enhances members' ability to achieve business success and reinforces ethical behavior between fellow REALTORS®.*

**MEMBER ENGAGEMENT:** *MOAR promotes the value of membership and enhances member engagement through resources and benefits, communications, and networking with peers.*

**COMMUNITY ENGAGEMENT:** *MOAR will enhance the visibility of the REALTOR® Brand to the consumer and promote the significant impact REALTORS® make in their communities through volunteer activities.*

**ORGANIZATIONAL EXCELLENCE:** *MOAR's operations, finances, staff, leadership, and governance structure provides for effective delivery of services, and superior customer service.*

# MIDWESTERN OHIO ASSOCIATION OF REALTORS®

## 2022 BUSINESS PLAN

JANUARY 12, 2022

### ADVOCATE



#### GOAL 1: ADVOCACY

**ADVOCACY:** MOAR will provide information and education to the members, the public, and elected officials to better understand the impact of public policy and legislation on the real estate industry.

**Objectives assigned to** – Staff (1.A.5 and 6), Governmental Affairs Committee and/or RPAC Committee

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**Objective 1.A: Vote, Act, Invest:** Implement Vote, Act, Invest member education campaign to promote the connection between involvement in advocacy and sustaining individual REALTORS®' businesses.

##### VOTE

1. At least annually, conduct a membership legislative outreach program to provide information on local/state/national issues that affect the real estate industry.
2. Promote to the members the importance of being a registered voter.

##### ACT

3. Increase awareness and need for participation in national and state *Calls for Action* and how each REALTOR® voice can impact pending legislation.
4. Identify and utilize "RPAC Ambassador" members who will speak on RPAC at meetings and events.

##### INVEST

5. Continue "above the line" RPAC contribution on dues invoice.
6. Include a \$15 RPAC contribution with NAR/Ohio and local dues billing.
7. Update the "Getting To Know RPAC Kit" that would be distributed to new members and each brokerage with RPAC talking points, information about Ohio RPAC "wins," investment levels, and how to respond to objections.

**Objective 1.B: RPAC Fundraising:** Raise voluntary RPAC investments from members, to assist the REALTOR® Party in supporting local, state, and national elected officials who support the real estate industry and private property rights.

1. Plan and implement an annual fundraising event designed to attain the annual Ohio REALTORS® Local Board RPAC Goals.
2. Participate in regional RPAC Major investor events to 1) encourage MOAR members to "step up" their level of RPAC investment and 2) encourage non-investors to do so.

**Objective 1.C: Relationships with elected officials:** Communicate and build relationships with local elected officials to monitor trends, economic development, legislation, support property rights, and homeownership.

1. Communicate with local elected officials about key issues that affect the real estate industry.
2. Encourage members to attend community legislative events including Chamber of Commerce events, city/county councils, etc. to network with elected and appointed officials.
3. Create a roster of members who hold elected city/county government positions, etc.

**Objective 1.D: Advocacy Resources (OR and NAR):** MOAR will expand its advocacy efforts through the utilization of state and national resources available to have an impact on local ordinances, laws, and community issues.

1. Investigate Issues Mobilization funding to address local issues impacting property ownership, strengthens schools and communities to encourage homeownership, such as school levies, farm reform, etc.)
2. Utilize MY REALTOR® Party grants (Smart Growth, homeownership, diversity, placemaking, etc.) to increase MOAR's community outreach.

**Objective 1.E: Advocacy Coalitions:** Create and/or enhance partnerships with fair housing organizations, the home builders, economic development associations, chambers of commerce, civic, and other organizations with aligned missions.

1. Actively engage with fair housing organizations in the community.

## ELEVATE



### GOAL 2: BUSINESS AND PROFESSIONAL SUCCESS

**PROFESSIONALISM:** MOAR enhances members' ability to achieve business success and reinforces ethical behavior between fellow REALTORS®.

**Objectives assigned to** - Staff (2.A), Education Committee

**Objective 2.A: Professional Standards:** Develop a plan to reinforce/remind agents of ethical practices and behavior between fellow REALTORS®. Provide new and continuing COE training, per NAR requirements

1. Remind REALTORS® about the duties and obligations they should practice under the Code of Ethics.
  - a. Provide Ethics case studies, trivia tests, etc. to Brokers for discussion in meetings
  - b. Include ethics questions in social media, email blasts, newsletter, etc.
2. Maintain a viable Professional Standards administration process to enforce the Code of Ethics and provide arbitration and mediation as a member service. **Ohio (rev. 1/4/24)**
  - a. Continue participation in a cooperative agreement with ~~Dayton~~ REALTORS® to provide Professional Standards services.
  - b. Provide a link to the NAR Code of Ethics/Professional Standards resources on the MOAR website for members and consumers. **(rev. 1/4/24)**
  - c. Promote the value of ~~local and~~ state ombudsman programs as a means of effectively addressing and proactively resolving disputes.
  - d. Track new member training compliance within 60 days of the membership application.
  - e. Track compliance with the bi-annual NAR ethics training requirement for all members.

**Objective 2. B: Education:** Offer and promote varied education courses as a key member benefit.

1. Offer, promote or provide opportunities for core classes.
2. Annually conduct a REALTOR® Safety course, as required by NAR Core Standards.
3. Annually conduct Fair Housing training, as required by NAR Core Standards.
4. Provide elective Continuing Education (CE) to the membership (such as hot topics, technology, social media, business best practices, transactions, etc.). Survey or gather member input annually on desired topics.
5. Solicit/review information about prospective education courses and speakers.
6. Continue to offer both live and online (virtual) educational options for members.



## GOAL 3: MEMBER ENGAGEMENT

**MEMBER ENGAGEMENT:** MOAR promotes the value of membership and enhances member engagement through resources and benefits, communications, and networking with peers.

**Objectives assigned to –** Staff (3.B), Forms (3.A.1.a), Affiliates (3.C and E)

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**Objective 3.A: Member Benefits:** Promote the benefits of membership (at all three levels) and the MLS.

1. Promote the benefits of MOAR
  - a. Forms (online and physical)
  - b. REALTOR® store at the MOAR office
  - c. Low and free C.E. classes
  - d. Networking with local affiliate business partners
  - e. Other benefits that MOAR offers
2. Promote the benefits of Ohio REALTORS® and NAR
3. Promote the benefits of the MLS

**Objective 3.B: Member Communications:** Utilize a variety of communication methods to ensure regular contact and engagement with members.

1. Invest in resources to manage communication through technology or traditional methods.
2. Increase MOAR’s social media presence through selected platforms – Facebook group
3. Newsletter sent by staff with events, CE classes, tips.
4. Place a list of service providers on the website (affiliates).

**Objective 3.C: Engagement and Networking:** Encourage member engagement/networking in Association activities and how it benefits the REALTOR’s career.

1. Conduct a “Membership Activity/Participation” program (with a prize) to promote participation in classes, membership activities, and association opportunities
  - Conduct Thirsty Thursdays activities (Networking)
2. Participate in Affiliate Committee networking events and fundraising activities.
  - Investigate beneficial ways to showcase affiliates and utilize their resources (such as sponsorship of classes, presenting CE classes, etc.).

**Objective 3.D: Broker Resources:** Develop broker resources for use in their brokerage firm.

1. Enhance the C.E. Broker Series, possibly in conjunction with Springfield Board to offer 3 programs annually.
2. Explore and offer other resources designed for use by brokers.

**Objective 3.E: Awards and Recognition:** Provide awards and recognition to those members who seek out additional education/designations, participate in Association committees and leadership positions, and get involved in the real estate industry.

1. Review the current list of awards and recognition to assess if there are alternatives, new awards (i.e. sales levels), etc. we should be offering.
2. Continue sending one new member to *Tomorrow’s Leader Today* program sponsored by Ohio REALTORS.

**Objective 3.F: Affiliates:** MOAR will work with the Affiliate Business Partners to promote and encourage interaction between Affiliate and REALTOR® members.

1. Develop an Affiliate Membership Recruitment Campaign which highlights the value of MOAR membership.
2. Encourage Affiliate participation in advocacy information education and fundraising activities.
3. Host a Third Thursday at 3 – networking, community outreach

## ENHANCE



### GOAL 4: COMMUNITY ENGAGEMENT

**COMMUNITY ENGAGEMENT:** MOAR will enhance the visibility of the REALTOR® Brand to the consumer and promote the significant impact REALTORS® make in their communities through volunteer activities.

**Objectives assigned to** - Staff (4.B and 4.C.1), Community Committee

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**Objective 4.A: Community Service:** Heighten community investment through organizing volunteer resources and/or fund-raising events.

1. Promote member-driven community activities such as REALTORS Care Day, Habitat for Humanity build, blood drives, National Night Out, etc. that showcase REALTORS involvement that makes our communities and neighborhoods stronger.
  - Plan and implement at least one member-driven fundraising activity (silent auctions, donation drive, Chili Cook-Off, etc.) that REALTORS/Affiliates can participate in with the proceeds benefitting local charities.

**Objective 4.B: Community Service Promotions:** Promote the volunteer community activities REALTORS® engage in which promotes REALTORS'® desire to create safe and vibrant communities to “sell”.

1. Reach out to reporters/newspapers/websites with stories and/or content that demonstrates a REALTOR involvement helps build vibrant communities to live in and sell. #REALTORSDoingGreatThings

**Objective 4.C: REALTOR® Brand Promotion:** Communicate relevant stories to promote the REALTOR® profession to the consumer.

1. Develop a consumer awareness campaign on how REALTORS® are the “trusted Voice of Real Estate.”
  - Use available state and NAR REALTOR® brand materials designed for consumer promotion.
  - Detail messages/stories about “Why Using a REALTOR® is important when buying/selling a house.” – Done monthly Homebuyers guide
2. Present and/or participate in activities that educate the consumer about the value of using a REALTOR®.
  - Sponsor or host homeownership fairs for consumers.



### GOAL 5: ASSOCIATION EXCELLENCE

**ORGANIZATIONAL EXCELLENCE:** MOAR's operations, finances, staff, leadership, and governance structure provides for effective delivery of services, and superior customer service.

**Objectives assigned to** - Staff (All), Executive (5.B), Board of Directors (5.C), Nominating (5.C)

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**Objective 5.A: Compliance with laws:** MOAR will conform to local, state, and federal laws, including filing necessary reports and documents.

1. Sales Taxes (filed bi-annually)
2. Bureau of Workers Comp (filed annually)
3. Federal/state/local tax returns (filed annually)
4. Certificate of Continued Existence (filed every five years)
5. Unclaimed Fund Document (file annually by Nov. 1)

**Objective 5.B: Finances:** Monitor MOAR's financial integrity and investment policies and protect MOAR's assets.

1. Develop an annual budget, monitor monthly, and report to the Board of Directors.
2. Review monthly reconciliation of checking, savings, and credit card accounts and signed by a member of the Executive Committee
3. Review MOAR Financial Policy annually (1<sup>st</sup> quarter of the year)
4. Review MOAR Investment Policy and progress with a 3<sup>rd</sup>-party advisor annually.
5. Retain independent CPA for an annual review and a full audit every third year in compliance with NAR Core Standards requirements (being completed in 2022)

**Objective 5.C: Board of Directors:** Recruit, prepare and involve volunteer leadership, which represents the interests of the Association and its diverse membership.

1. MOAR will annually certify that the Board of Directors has reviewed and discussed the strategic plan and that the components have actionable implementation strategies.
2. Ensure Bylaws are certified by NAR annually and approved by the Board if changes are made.
3. Annually provide resources for leadership development education and/or training for elected REALTOR® leaders.
  - New Directors will participate in orientation before the first Board of Directors meeting of the year.
  - Annual Board orientation will include a discussion on Board fiduciary duties, association requirements under Core Standards, and DEI.
4. Proactively identify and recruit future elected leaders by providing leadership opportunities through committee participation.
5. The Nominating Committee will develop a Succession Plan to prepare for future leadership for the Board of Directors.

**Objective 5.D: Core Standards Compliance:** MOAR will annually review and put into place activities to ensure compliance with NAR Core Standards requirements.

1. Re-structure MOAR committees so that the activities committees perform to meet the NAR Core Standards requirements.

**Objective 5.E: Human Resources:** Ensure MOAR has the professional staff necessary to achieve its strategic goals.

1. Executive Officer will review Personnel Handbook annually and have legal counsel review any changes or updates to the manual.
2. The Executive Officer will develop procedures for conducting an annual performance review of paid staff, during their anniversary month.
3. The Executive Committee will develop policy and procedures for conducting an annual performance review of the Executive Officer during October.
4. The Executive Officer must attend at least six (6) hours of REALTOR association professional development on an annual basis to meet NAR Core Standards.

**Objective 5.F: Technology:** Regularly examine MOAR's operations, technology, and facility needs to better serve the members.

1. Every association must have an interactive website (defined as the ability to move between websites and create active links) and is ADA compliant.
2. Investigate association management software that would be compatible with QuickBooks and provide membership payment and education tracking tools, various membership reports, and have merge functions to allow quick and easy mail, fax, email, labels, etc.

Reviewed by the MOAR Board of Directors 02/02/2023.

Reviewed by the MOAR Board of Directors 01/04/2024.