Strategic Plan 2017-2018

Created June, 2016, by the Texas Association of REALTORS® Strategic Planning Committee.

TEXAS ASSOCIATION OF REALTORS®

Texas Association of REALTORS®
Strategic Planning Committee

Committee members 2016

Carolyn Arnold, *Midland*
Tray Bates, *Corpus Christi*
Shadrick Bogany, *Houston*
Cathy Coneway, *Austin*
Tiffany Curry, *Houston*
Vicki Fullerton, *Houston*
Tim Garrett, *Lubbock*
Daniel Hatfield, *Comfort*
Bill Jones, *Temple*
R. Scott Kesner, *El Paso*
Sarah Kulungowski, *Harlingen*
Kaki Lybbert, *Denton*
Gary Maler, *College Station*
Cathy Mitchell, *Dallas*
Hanne Sagalowsky, *Dallas*
Brian Sales, *Midland*
Sylvia Seabolt, *Garland*
Kristin Smith, *Dallas*
Leslie Rouda Smith, *Plano*
J. René Ward, *Round Rock*
Amber Weitzer, *Southlake*
Rebecca Whittier, *New Braunfels*
Ronald Willis, *Corsicana*

Retreat Facilitator

Elizabeth Mendenhall, First Vice President
National Association of REALTORS®

2016 Committee Chair

Hanne Sagalowsky

2016 Vice Chair

J. René Ward

2016 Committee Liaison

Tim Garrett

2016 Texas Association of REALTORS® Leadership Team

Leslie Rouda Smith, Chairman, *Plano*
Vicki Fullerton, Chairman-Elect, *Houston*
Kaki Lybbert, Secretary/Treasurer, *Denton*
Tray Bates, Secretary/Treasurer-Elect, *Corpus Christi*
R. Scott Kesner, Immediate Past Chair, *El Paso*
Travis Kessler, President/CEO, *Austin*

Senior staff participants in Strategic Planning retreat

Mike Barnett
Angela Brutsché
Mark Lehman
Lori Levy

TEXAS ASSOCIATION OF REALTORS®

How the Strategic Plan is Used

The Texas Association of REALTORS® Strategic Plan is designed to promote effective organizational alignment among all stakeholders. As a guiding resource for volunteer leaders and staff, the plan can be used to:

- Guide TAR committees and association leaders when contemplating new initiatives
- Develop budgets that align with organizational objectives
- Prioritize programs and services

The association's Strategic Plan is available at texasrealestate.com.

Executive Summary

The Texas Association of REALTORS® Strategic Planning Committee began its work hosting a series of learning and discussion session on issues and trends affecting the real estate industry. Webinars were held to review topics relevant to the real estate industry and the association, including the:

- Texas economy and housing market
- Multiple Listing Service (MLS)
- Millennial generation
- Real estate industry threats

Using this information in its environmental scan, the committee worked to build a plan that further advances the mission of serving REALTORS® and property owners in Texas.

In addition to participating in discovery sessions, the committee examined important insights through a member-wide survey conducted in February 2016. The feedback from members allowed the committee to have an even deeper perspective about what members find most valuable. The survey garnered responses from 4,721 members who represented a wide range of perspectives on the most valued resources and tools provided by the Texas Association of REALTORS® (TAR). Nearly all respondents found value in the information TAR provides to help members succeed. Key findings include:

Top three threats to the real estate industry:
70% said: Unprofessional/unqualified agents
51% said: Business models that eliminate the REALTOR®
47% said: Weakening REALTOR® value proposition to consumers

**The highest-rated member services were:**
- zipForm
- TAR forms
- Code of Ethics and professional standards enforcement
- TAR Legal Hotline
- TAR website, texasrealestate.com
- Advocacy and lobbying efforts
- Texas REALTOR® magazine

Armed with industry knowledge and members' input, the Strategic Planning Committee seized opportunities to further define existing initiatives while expanding programs that are of most importance to members.
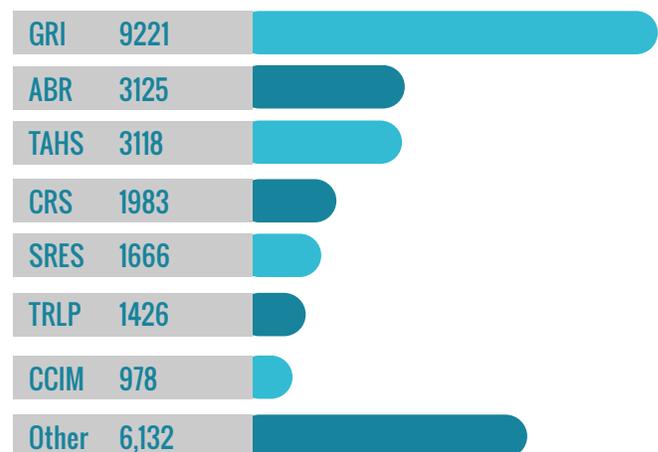
Membership

With a REALTOR® membership of approximately 100,000, records indicate 14% of all members joined within the last 12 months. Twenty-nine percent of all members joined within the last three years. The average age of TAR members is 50 years. Sixty-one percent of members are female, and 39% are male. At least 15% hold one or more professional designations.

Members by age group
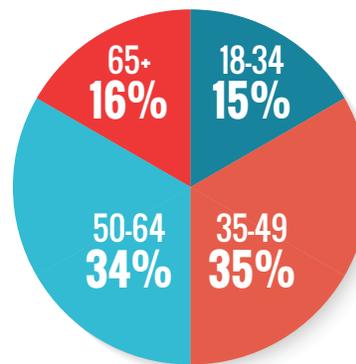
Designations held by members

GRI	9221
ABR	3125
TAHS	3118
CRS	1983
SRES	1666
TRLP	1426
CCIM	978
Other	6,132

Other includes TRLS, CPM, GREEN, CIPS, CRB, SIOR, LTG, ALC, CRE, ABRM, RCE, TRPM, TWHS, RAA and GAA

About us

The Texas Association of REALTORS® is a professional membership organization that represents all aspects of real estate in Texas. We advocate on behalf of Texas REALTORS® and private-property owners to keep homeownership affordable, protect private-property rights, and promote public policies that benefit homeowners.
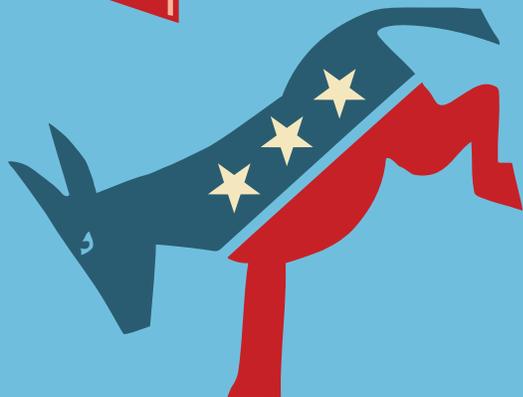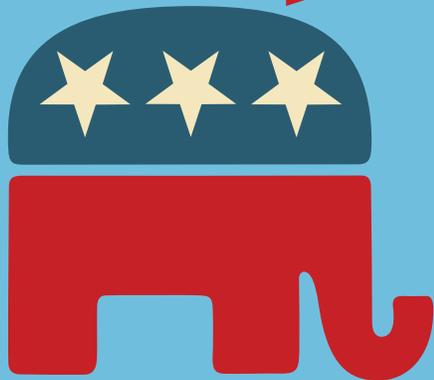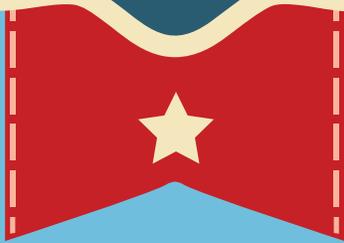
Vision

The Texas Association of REALTORS® is the advocate for REALTORS® and private-property owners in Texas.

4 Main Areas of Strategic Focus

1. Political advocacy

2. Practical services

3. Professional development

4. Partnerships

Texas Association of REALTORS®
Strategic Plan

Political

Provide unparalleled political advocacy and consumer outreach

Actions

- Build a political advocacy/TREPAC culture with all members by showing clear examples of how TREPAC makes a difference to a member's business

- Increase political advocacy content in Texas REALTOR® magazine and other member and public-facing communications

- Involve both communications and political affairs to create and promote a unified advocacy plan

- Create a common tagline for all advocacy communications (member and public) that clearly identifies Texas Association of REALTORS® as the source for advocacy of property ownership

- Adapt communication strategies to changing member and voter demographics to remain politically relevant and member-driven

- Develop a brokerage-driven program that makes it compelling and easy for clients and customers to support the advocacy efforts of the Texas Association of REALTORS®

- Engage the public via multiple media channels on issues that affect real estate consumers. Utilize members as conduits for association messages

- Solicit and use testimonials of leaders in the community on the importance and effectiveness of Texas REALTORS®' advocacy efforts

- Develop Texas-specific advocacy materials for use at events/meetings and for local association distribution

- Utilize surveys to gauge trends in member and consumer sentiment on issues affecting private-property ownership across all demographics

- Develop and implement a state independent expenditure program to maximize the effectiveness of Texas REALTORS®' political affairs activities (reflecting the modern political landscape) while continuing to maximize the independent expenditure funding allocated to Texas by the National Association of REALTORS®

- Implement the advocacy strategies developed through the Breaking New Ground Governmental Affairs planning process

- Increase member participation in Calls for Action

- Create a plan for Texas REALTORS® Leadership Program graduates and local Association Executives to become political affairs ambassadors

- Actively recruit and train qualified REALTOR® candidates to run for office at all levels of government

- Communicate our public-policy successes nationally to share best practices with others and enhance the image of Texas REALTORS®

DATA CENTER

Practical

Offer practical services that enhance members' success and emphasize the value proposition of membership (leading to member profitability)

Actions

- Create and implement guidelines and criteria that focus on unique opportunities and discounts for the TAR Member Benefits Program

- Build upon association services valued by members through periodic surveys and enhance marketing efforts to increase member knowledge and adoption of those services

- Maximize social media presence to enhance messaging to members and consumers

- Provide Texas REALTORS® valuable risk management tools, resources and education on best practices and effective ways to minimize risk

- Develop deliverables on the Data Relevance Project focusing on messaging, data analysis, event and impact studies in partnership with the Real Estate Center at Texas A&M. Continue the delivery of market analytics aimed at positioning Texas REALTORS® as the most reliable source of accurate and timely real estate market information

- Improve TAR website to effectively serve members and consumers with improved navigation and content that promotes the REALTOR® value proposition and advances TAR's mission.

Professional

Emphasize continual professional development of Texas REALTORS® and encourage innovative approaches to delivery

Actions

- Emphasize the role that broker responsibility plays in the overall professionalism of the industry by enforcing ethical and competent business practices

- Provide resources and education to Texas REALTORS® which communicate the impact and opportunities of changing demographics and increased diversity in Texas

- Track our involvement with the various real estate-related groups, both within and outside the REALTOR® organization, fostering collaborative information exchanges

- Employ innovative methods to deliver timely, relevant member education at a profitable level

- Use Texas REALTORS® University and other innovative methods to provide timely, relevant Continuing Education (CE) and qualifying coursework that increases the professional knowledge and credibility of our members

- Market certification and designation programs to meet diverse, changing member needs

- Design professional development initiatives to help members recognize the importance of changing demographics in an increasingly global market

- Identify a list of agent core competencies and key performance indicators as aspirational targets for our members

- Emphasize broker education related to sustaining a successful and profitable business, including issues related to policy and operations, liability, risk management and best practices

- Through a variety of communication vehicles, address unique aspects of specialties in real estate, including dynamic market conditions that drive many specialties

- Promote the Texas Association of REALTORS® citation policy to increase its utilization by Texas REALTORS®.

Partnerships

Focus on partnerships that provide strategic opportunities and services for Texas REALTORS®

Actions

- Partner with Texas REALTORS® to maximize value in services:

  - Enhance the association's relationship and cooperation with organizations that deal with cultural, generational and outreach involvement

  - Communicate in the most effective manner with Texas REALTORS® keeping in mind changing communication preferences

- Partner with local REALTOR® associations to strengthen the overall package of services delivered to Texas REALTORS®:

  - Collaborate with local associations to share best practices and strengths that can be incorporated in to delivery of services

  - Continue the Data Relevance Project in partnership with local associations and their MLSs to enhance the position of Texas REALTORS® as the Voice for Real Estate

  - Continue the Multi-Board Management Program while periodically reviewing its mission and effectiveness

- Partner with industry partners to strengthen the association's position in the industry and provide enhanced services to members:

  - Explore new strategic partnerships with real estate-related organizations, such as the Real Estate Center at Texas A&M, regulatory entities and the National Association of REALTORS®, in an effort to harness combined resources to provide new tools and services for members

- Partner with industry and technology-related vendors to drive innovations and enhance services provided to Texas REALTORS®:

  - Leverage the collective buying power of the association to provide for new unique, creative and collaborative opportunities for services to be offered to Texas REALTORS®

  - Research viability of creating a program that seeks out new vendor relationships that drive innovation from both a service and operational standpoint