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## APPENDIX F

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### REPORT OF THE STRATEGIC PLANNING RETREAT March 3-4, 2015

#### 1. Planning Team

A strategic planning team representing the New Hampshire Association of REALTORS® met on March 3<sup>rd</sup> and 4<sup>th</sup>, 2015 at the Mountain View Grand Resort in Whitefield, NH with facilitator Roger Turcotte of New Hampshire. This report contains the results of the team's work.

#### Participants:

Kathy Ahlin	Rachel Eames	Bob Quinn, staff
Marion Cheney	Maxine Goodhue	Terry Ryan
Dave Cummings, staff	Theresa Grella	Mary Truell
Marc Drapeau	Paul Griffin, staff	Roger Turcotte, facilitator
Dick DuMez	Dave Lefebvre	Mark Zoeller
Diana Dunning, staff	Al Michalovic	
	Dan O'Halloran	

#### 2. Stakeholder identification

The team identified the following as primary stakeholders meaning that they directly benefit from or are impacted by NHAR's work:

- Broker/Owners
- Agents
- Sellers/Buyers
- Local Boards/Associations

#### 3. Mission Statement

**The planning team reviewed NHAR's mission statement and revised it as follows:**

*The NH Association of REALTORS® works in conjunction with the National Association of REALTORS® and the Local Boards of REALTORS® to provide its members with support and resources to serve consumers in an efficient, effective and ethical manner; and to advocate for private property rights.*

#### 4. SWOT Analysis

The results of the SWOT (Strengths, Weaknesses, Opportunities, Threats) recently completed by the planning team were reviewed. The following were identified as STRENGTHS, WEAKNESSES, OPPORTUNITIES and THREATS of the organization:

➤ **Strengths**

- Number of members
- Staff
- National resources
- NHAR known organization in communities/statehouse
- Public policy
- Financial position
- Distribution of market data from NNEREN
- Professional standards/Ombuds
- Forms
- Risk management tools
- Members' willingness to serve

➤ **Weaknesses**

- Longevity of some volunteers discourages new volunteers and restricts opportunities to change
- Process used to select committee leaders
- Leader selection/development
- Lack of REALTOR® designation courses
- Communicating with members
- Lack of understanding of RPAC money
- Lack of awareness at leadership level regarding what REALTOR® political party is doing in DC
- Large percentage of members are paying dues because they have to
- Lack of awareness of available resources
- Lack of DR educational classes

➤ **Opportunities**

- Information technology to help members
- Volunteer recruitment
- Better use of Member Liaisons
- Improve connecting members to resources
- Defining/communicating member value
- Enhance relationship with service providers who support members

1           ➤ **Threats**

- 2           • No required membership
- 3           • REALTORS® don't own realtor.com
- 4           • Low bar to become a REALTOR®
- 5           • Member apathy
- 6           • Consumer access to information/internet sites
- 7           • Disconnect between agent and broker by agents working at home
- 8           • Providing volunteers a sense of value
- 9

10          **5. The strategic objectives/goals listed in this report are prioritized based on**

11          **their impact on the association's mission (see note #1). Those listed under**

12          **Advocacy and Outreach are shown first in this report since they are**

13          **required under the NAR Organizational Alignment Core Standards.**

14

15          **Objective 1:**

16          Raise 100% of the established RPAC Fundraising goal.

17

18          **Objective 2:**

19          Achieve participation rates on NAR and State calls for action that are better than the

20          average participation rates.

21

22          **Objective 3:**

23          Support property rights, housing, and real property ownership by providing active

24          campaign assistance for local political candidates that are friendly to Realtor® Party

25          issues.

26

27          **Objective 4:**

28          Be the "Voice for Real Estate" and promote market statistics and/or real estate trends

29          and issues and their impact on consumers.

30

31          **Objective 5:**

32          Enhance community involvement to promote the value proposition of using a

33          REALTOR® and/or engage in community activities that enhance the image of

34          REALTORS®.

35

36          **Objective 6**

37          Boost consumer advocacy efforts and engage the public in legislative/political issues

38          that impact homeownership, real estate investment and related issues.

39

40                   **Additional Strategic Objectives Not Required in the Core Standards**

41

42          **Objective 7**

43          Communication system is in place that allows information to flow from NHAR to

44          local associations and from local associations to NHAR 39/27

45

46

1           **Objective 8**

2           Experience/training required for a member to be assigned as a state committee chair is  
3           defined and followed when selections are being made for these positions 38/34  
4

5           **Objective 9**

6           A minimum of 50% of membership would say that they would renew their  
7           membership if not required to do so 37/39  
8

9           **Objective 10**

10          NHAR offers one NAR certification course annually at different locations throughout  
11          the state 37/32  
12

13          **Objective 11**

14          Designated Realtors are knowledgeable regarding national and state resources and  
15          encourage their agents to utilize the resources that will help them to achieve their  
16          goals 37/29  
17

18          **Objective 12**

19          NHAR offers three (3) courses annually that focus on the needs of Designated  
20          Realtors. These courses will be offered in different locations around the state 34/39  
21

22          **Objective 13**

23          NHAR connects with new members to augment local orientation 33/29  
24

25          **Objective 14**

26          NHAR committees will have a turnover of 25% of the committee members each year  
27          by the recruitment of new members to fill these positions 29/31  
28

29          **Objective 15**

30          NHAR committee membership will represent the demographics of NHAR's  
31          membership population 26/28  
32

33          **Objective 16**

34          Over a three year period, RPAC contribution growth will reach a total contribution  
35          equal to 125% of NHAR's goal with a participation rate equal to fifty percent of the  
36          membership 21/38  
37

38          **Objective 17**

39          NHAR assist affiliate partners in selecting appropriate topics as well as designing and  
40          presenting courses at the state and local levels 16/36  
41

- 42  
43          6.          **The following reflect the 'possible action plans' that the planning team**  
44                    **developed for the majority of the strategic objectives.**  
45  
46

## Core Standards - Advocacy

### **Objective 1:**

Raise 100% of the established RPAC Fundraising goal.

#### **Possible Action Plans:**

- 1.A NHAR will appoint a state fundraising chair to coordinate with/support local associations
- 1.B NHAR will monitor progress on a monthly basis
- 1.C RPAC auction will be conducted once a year
- 1.D Local boards that meet goal will be recognized by NHAR

### **Objective 2:**

Achieve participation rates on NAR and State calls for action that are better than the average participation rates.

#### **Possible Action Plans:**

- 2.A Promote members of the board of directors to download/use the Realtor® Action Center App
- 2.B Promote brokers to sign up for the Broker Involvement program so agents get the calls for action directly from their broker.
- 2.C Personal outreach at Designated Realtor meetings

### **Objective 3:**

Support property rights, housing, and real property ownership by providing active campaign assistance for local political candidates that are friendly to Realtor® Party issues.

#### **Possible Action Plans:**

- 3.A NHAR RPAC supports candidates for NH State Senate
- 3.B Provide information to the local associations regarding NAR grants
- 3.C Maintain an active lobbying presence at the statehouse
- 3.D Interview Senate candidates to determine where they stand on issues affecting Realtors, sellers, and buyers
- 3.E Support REALTORS® who are running for office

## Core Standards-Consumer Outreach

### **Objective 4**

Be the “Voice for Real Estate” and promote market statistics and/or real estate trends and issues and their impact on consumers.

#### **Possible Action Plans:**

- 4.A Highlight local, state or national real estate data in a news release or direct outreach to local reporters.
- 4.B Arrange interviews with association leadership to provide context to local real estate data.

1 4.C Use social media to share local real estate data insights, and retweet NAR  
2 Economists' Outlook.  
3

4 **Objective 5**

5 Enhance community involvement to promote the value proposition of using a  
6 REALTOR® and/or engage in community activities that enhance the image of  
7 REALTORS®.  
8

9 **Possible Action Plans:**

10 5.A Run a TV, radio or print ad from NAR's Consumer Advertising Campaign or  
11 the state association's consumer advertising campaign in a local media  
12 outlet.

13 5.B Sponsor homeownership fair.

14 5.C Provide materials that help members reach out to consumers directly.  
15  
16

17 **Objective 6**

18 Boost consumer advocacy efforts and engage the public in legislative/political issues  
19 that impact homeownership, real estate investment and related issues.  
20

21 **Possible Action Plans:**

22 6.A Submit an op-ed or letter to the editor of the local newspaper addressing the  
23 issue at hand. NAR's most recently submitted and published op-eds and letters to the  
24 editor are available at [http://www.realtor.org/for-the-media/op-eds-and-letters-](http://www.realtor.org/for-the-media/op-eds-and-letters-to-the-editor)  
25 [to-the-editor](http://www.realtor.org/for-the-media/op-eds-and-letters-to-the-editor).  
26

27 **Additional Strategic Objectives Not Required in the Core Standards**  
28

29 **Objective 7**

30 Communication system is in place that allows information to flow from NHAR to  
31 local associations and from local associations to NHAR 39/27  
32

33 **Possible Action Plans:**

34 7.A Mandatory training/orientation for Member Liaisons

- 35 • Report to BOD 4 times a year; liaison should not only pull state to  
36 Boards but also Boards to Boards (i.e., education classes).  
37 Collaboration!
- 38 • Revisit task force recommendations of 2010 – 7 liaisons with 1  
39 Exec. Comm. member.

40 7.B Email subject lines – color coded by importance (internal only)

41 7.C Reaching out to DRs; filter some significant messages through them

42 7.D Explore other means of communication

- 43 • Pod casts, texting, Facebook, YouTube  
44

45 **Objective 8**

46 Policy is in place that defines the experience/training that a volunteer must have before  
being considered for assignment as a state committee chair 38/34

1           **Possible Action Plans:**

- 2           8.A    Executive and Board of Directors approves Leadership Academy that includes  
3                    training in Robert’s Rules, time management, by-laws, policy and procedure  
4                    manual, and role of NHAR staff members  
5           8.B    Mandatory requirement to attend NHAR Leadership Symposium  
6           8.C    Based on individual’s experience, committee chairs should serve on the  
7                    committee before becoming chair of the committee.  
8           8.D    Past committee chairs serve as mentors for upcoming committee chairs  
9           8.E    Leaders who have complete the experience/training requirements will be  
10                    considered to fill future leadership positions on a 4 year succession plan.

11  
12           **Objective 9**

13           A minimum of 50% of members would say that they would renew their membership if  
14           they were not required to do so 37/39

15  
16           **Possible Action Plans:**

- 17           9.A    Implement strategic initiatives (see #1, #4 and #8)  
18           9.B    Staff to implement a monthly “drip campaign” of NAR and NHAR resources  
19                    specific to following categories of members:  
20                    •   New Agents  
21                    •   Existing Agents  
22                    •   DRs  
23           9.C    Statewide education calendar on website  
24           9.D    Implement annual “satisfaction” survey  
25                    •   Must achieve 50% renewal goal – strategic initiative doesn’t have  
26                    time requirement...  
27                    •   Potential for feedback  
28                    •   Executive committee to review survey results; revise action plan to  
29                    achieve strategic goal (50%)

30  
31           **Objective 10**

32           NHAR offers one (1) NAR certification course each year at different locations  
33           throughout the state 37/32

34  
35           **Possible Action Plans:**

- 36           10.A   Professional development committee would choose course (NAR designation),  
37                    determine 2-4 locations depending on demand. (Example: ABR is a two day  
38                    course so it would be offered twice in one year.)  
39           10.B   Every year the designated course would change with the goal being to offer the  
40                    major NAR designation courses  
41           10.C   Locations selected should, when possible, not require a member to travel more  
42                    than 45 mile drive to attend.

43           **Objective 11**

44           Designated Realtors are knowledgeable regarding national and state resources and  
45           encourage their agents to utilize the resources that will help them to achieve their  
46           goals 37/29  
47

1 **Possible Action Plans:**

2 11.A At the beginning of the 3 NHAR Designated Realtor classes, there will be a  
3 quick 10 minute presentation on “how and what” they can say to new agents  
4 regarding the resources that they receive for the dues money they pay.

5 11.B One of the “drip” emails to DRs (see Objective 9) can be about explaining  
6 resource benefits to agents.

7 11.C Send out index lists of benefits along with dues bills.

8 11.D Remind DRs about NHAR offered orientations for new agents; TEXT them a  
9 week before the orientations occur.

10  
11 **Objective 12**

12 NHAR offers three (3) courses annually that focus on the needs of Designated  
13 Realtors. These courses will be offered in different locations around the state 34/39

14  
15 **Possible Action Plans:**

16 12.A Identify courses available directed to DRs – NAR; other

17 12.B Survey DRs as to which courses they would find valuable – what other topics  
18 would be of value?

19 12.C Pick top 3 courses and schedule the 3 different courses at 3 different locations

20  
21 **Objective 13**

22 NHAR connects with new members to augment local orientation 33/29

23 **Action plan to be developed**

24  
25 **Objective 14**

26 NHAR committees will have a turnover of 25% of the committee members each year  
27 by the recruitment of new members to fill these positions 29/31

28 **Action plan to be developed**

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31 NHAR committee membership will represent the demographics of NHAR’s  
32 membership population 26/28

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35 **Objective 16**

36 Over a three year period, RPAC contribution growth will reach a total contribution  
37 equal to 125% of NHAR’s goal with a participation rate equal to fifty percent of the  
38 membership 21/38

39  
40 **Possible Action Plans:**

41 16.A Annual training for local RPAC Chairs

42 16.B Task force created annually with one representative per each local Board

43 16.C NHAR representative to make annual presentation to each local Board

44  
45 **Objective 17**

46 NHAR assist affiliate partners in selecting appropriate topics as well as designing and  
47 presenting courses at the state and local levels 16/36



1           **Action plan to be developed**  
2

3           **Note #1** – Strategic objectives were prioritized based on the impact of the objective  
4           impact on NHAR’s missions. This process consisted of each participant assigning a  
5           value to each objective based on: required to succeed (3), not required but very  
6           beneficial (2), nice to have (1). The value assigned by the participants was added up  
7           and the total value was the number that determined the priority of each objective.  
8           The second numeric value indicates the team’s opinion of how NHAR is performing  
9           that objective today. This process consisted of each participant assigning a value to  
10          each objective based on: Objective is not being performed or is being performed at a  
11          minimal level (3), being done but needs improvement (2), being done very well (1).  
12          Therefore, a high value indicates that the objective requires greater work/attention in  
13          order to achieve the desired performance.  
14