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|--|--------------------|
|  | On Target          |
|  | Caution            |
|  | Won't Reach Target |





| Strategic Goals                          | Objectives  | Strategies  | Priorities   | Advocacy Group                                  | Staff Responsibility | Date                              | 2016  | Notes   |  |
|--|---|---|--|---|----------------------|-----------------------------------|---|---|--|
| I. Increase / Retain Association Revenue | 1. Expand / Improve the DeKalb Real Estate Expo   |   | 50% increase in net revenue. Increase attendance by 20%. | Expo Task Force                                 | CEO                  | Event Date: before end of October |  |   |  |
|  |   | A. Come up with a robust program agenda including guest speakers and 1.5 hour CE class by June 30   |  |   |                      | June 30                           |   |   |  |
|  | 2. Self-funding for each event so each committee must come up with a budget.            |   |  | Financial / Association Investment Committees   |                      | January                           |   |   |  |
|  | 3. Review investment accounts on a regular basis, and make adjustments as needed.       | Research and consult with Investment Advisor to determine if Board policy should be changed to move risk profile to a growth and income strategy. |  |   |                      | April & October                   |  |   |  |
|  | 4. Review Association financial records on a regular basis.                             | More detailed breakdown of monthly reports.   |  |   |                      | Monthly                           |  | Committee & reviewed at BOD meetings.   |  |
|  | 5. Review ROI for sponsors and Business Affiliate Members                               | Develop a PAG selected by the President which will makeup the Sponsorship Committee.  |  | Financial / Sponsorship / Membership Committees |                      | July                              |  |   |  |
|  |   | A. Hold Business Affiliate/ Engagement Roundtable.  |  | VC Business Affiliates                          |                      | Dee / Pearl                       |   |  |  |
|  |   | B. Revise Business Affiliate ROI sheet, as needed.  |  | Sponsorship Committee                           |                      |                                   |   |   |  |
|  |   | C. Create an Affiliate of the Year Award with pre-determine metrics.  |  | Awards Committee                                |                      |                                   | Recognized at Holiday Luncheon  |   |  |
|  |   |   |  |   |                      |                                   |   |   |  |
|  | 1. The Young Professionals Network for the Association will plan events for that group. |   |  |   | Pearl                |                                   |   |   |  |
|  | A. Submit information to NAR & GAR for recognition.                                     |   |  |   |                      |                                   |   |   |  |

**II. Increase / Retain Membership**






|  |  |   |                                       |             |               |  |  |
|--|--|---|---------------------------------------|-------------|---------------|--|--|
| 2. Meet with current and potential broker members / attend office meetings.  | B. Plan, market and execute at least two signature networking or education events.                 |   | YPN / Membership Committee            |             |               |  | Attended Braves game & offered (2) classes: Brown Bag & CE course? |
|  | C. Develop a PAG selected by the President to select the YPN Committee.                            |   |                                       |             |               |  |  |
| 2. Meet with current and potential broker members / attend office meetings.  | A. 10 or more current broker members.  |   | Membership Committee                  | CEO / Pearl | Annually      |  | Completed 4-5 office visits  |
|  | B. 10 or more potential broker members.  |   |                                       |             |               |  |  |
| 3. Follow up with new members via drip email campaign, welcome card and direct ask for involvement.  |  | Determine a better/ more modern strategy to communicate with members. |                                       |             |               |  |  |
|  | A. Drip email campaign   |   | Membership / Communications Committee | Dee         | Ongoing       |  |  |
|  | B. Welcome Cards   |   |                                       | Ronda       |               |  |  |
|  | C. Direct Ask  |   |                                       | Pearl       |               |  |  |
|  | D. Campaign to sign up members for text.   |   |                                       | Dee         |               |  |  |
|  | E. Create a budget for Public Relations & Marketing Expenses to include, but not limited to video. |   |                                       | CEO         |               |  |  |
|  |  |   |                                       |             |               |  |  |
| 4. Plan a variety of professional development (see III), social or community outreach (see IV) events to attract different segments of the membership. |  |   |                                       |             |               |  |  |
|  | A. Past President's Luncheon   |   | Membership                            | CEO / Dee   | Spring        |  |  |
|  | B. Broker Engagement Event   |   |                                       | Pearl       | Spring & Fall |  |  |







|  |   |                                    |                                    |   |               |                  |   |  |
|--|---|------------------------------------|------------------------------------|---|---------------|------------------|---|--|
|  | C. Business Affiliate Member Roundtable and Appreciation Reception                                    |                                    | Committee                          | CEO / Dee                                       | Spring & Fall |                  | <i>Business Affilaite Roundtable - No. Apprecation Reception held in November.</i>  |  |
|  | D. New Members  |                                    |                                    | Pearl   | Ongoing       |                  |   |  |
|  | E. Member Forums  | i. Spring Membership Forum         |                                    | President - Elect / Membership Committee        | CEO / Dee     | April or May     |   |  |
|  |   | ii. Pinnacle                       |                                    | Pinnacle Awards Committee                       |               | March            |   |  |
|  |   | iii. Fall Membership Forum at Expo |                                    | President - Elect / Real Estate Expo Task Force |               | Fall @ Expo      |   |  |
|  |   | iv. December Membership Meeting    |                                    | President - Elect / Membership Committee        |               | Holiday Luncheon |   |  |
| v. Establish a task force to create a Commercial Council |   |                                    | President / President-Elect        | CEO   | June          |                  |   |  |
|  |   |                                    |                                    |   |               |                  |   |  |
| III. Provide   | 1. Collaborate and engage with the Chamber of Commerce.   |                                    | Professional Development Committee | Ronda   | Ongoing       |                  | <i>Had evening networking event with Leadership DeKalb at DeKalb Association offices. Officer reps attended Chamber events. Participated in DeKalb Chamber School Bus Tour. Promoted candidate forums for</i> |  |
|  | 2. When appropriate, partner with and promote other opportunities from WCR, GAMLS and other entities. |                                    | Community Outreach Committee       | Ronda / Dee                                     |               |                  | <i>Scholarship. Provided classroom &amp; meeting space for DeKalb WCR and GA WCR. With GAMLS, contributed to Disaster Relief Campaign.</i>  |  |

|   |  |  |  |   |             |         |   |  |
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| III. Provide Professional Development Opportunities for Members                       | 3. Offer Broker classes.   |  |  | Professional Development / Community Outreach Committees                        | Ronda       |         |   | Pre-license, Post-license or Broker courses. Must run through another school approved to do so (GAMLS is approved for Broker classes). Michelle Pettway has offered.   |
|   | 4. Schedule monthly Continuing Education and non-CE education programs.  | Re-evaluate our educational strategy to ensure we're offering the latest and greatest topics trending in the industry by creating a trend-setting task force and, when feasible, incorporate other locations and activities. |  |   |             | Monthly |    | Potential topics: Earnest money / How to avoid audit problems with GREC?   |
|   | 5. Complete the online New Member Orientation.   |  |  | Membership Committee  | CEO / Pearl |         |   | (2) years, ask if Leadership is willing to teach classes and if a budget can be approved to pay instructors?   |
|   |  |  |  |   |             |         |   |  |
| IV. Enhance the REALTOR Image through Community Development and Service Opportunities | 1. In addition to current members, encourage involvement at New Member Orientation. Follow up with direct ask. | When staff receives committee registration form, send a welcome email notifying them of the next meeting date and notify the Committee Chair so they can personally welcome them.  |  | Orientation Committee   | Pearl       |         |    | Not following up with direct ask. Could send out quarterly email asking members to join a committee.   |
|   | 2. Select community service activities and promote them for member and community participation.                | Through the GAMLS, our subsidiary, be a member of Tucker Northlake community Improvement District.   |  | Community Outreach / Communications and PR Committees                           | Ronda       | Ongoing |    | Send books, magazines & DVDs to VA Hospital. Cash donation proceeds from Golf Tournament to Methodist Children's Home. \$1k contribution to Disaster Relief Fund. DWHIP held homebuyer workshops in community. |
|   | 3. Assist DeKalb County School Board by recruiting members to serve on local school councils.                  |  |  | Political Affairs Committee / VC Local Political Affairs - School Board Liaison | CEO         |         |  |  |
|   | 4. Update press and media contacts.  | Produce a template Press release.  |  |   |             | April 1 |   |  |

|  |   |  |  |  |     |   |   |  |
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|  | 5. Develop an updated communications plan. Produce and distribute regular press releases and association updates through social media, websites (i.e. NAR, GAR), email, texts, and other media. | Produce and distribute regular press releases and association updates through social media, website, email, texts, and other media.                          |  | Communications & PR Committees                       | Dee | May 1                                   |   |  |
|  | 1. Coordinate member meetings with elected officials to discuss matters of importance to REALTORS   |  |  |  |     |   |   |  |
|  |   | A. Encourage member participation in the GAR REALTOR Legislative Day at the Capital and at the GAR State and Local Governmental Affairs Committee Meetings.  |  | RPAC Trustees  |     |   |  |  |
|  |   | B. Require attendance at both for Leadership Academy graduation.   |  | Leadership Academy Dean                              | CEO | GAR Inaugural in February               |  |  |
|  |   | C. Promote through social media emails, and other media.   |  | Political Affairs / Communications and PR Committees | Dee |   |  |  |
|  |   | D. Schedule meetings with teams of Association REALTORS attending Legislative Day and all elected officials whose regions include portions of DeKalb County. |  | VP Political Affairs                                 |     | February prior to GAR Inaugural Meeting |  |  |
|  | 2. Hold a Political Forum to discuss local issues before elections.   |  |  | VP Political Affairs / President-Elect               |     | Prior to Election Day                   |   | <i>Not completed. Instead, RPAC Trustees met with several candidates.</i>                                |
|  |   | A. Appoint Association members to serve as liaisons to county commissioners and school board members and report activity.                                    |  | President / President-Elect / VP Political Affairs   |     | Monthly Reports                         |   | <i>Done, but still need a job description for Local Political Affairs - County Commissioners Liaison</i> |

**V. Maintain Political Involvement through Advocacy and Member Engagement**

|   |   |   |  |           |                 |   |                                       |
|---|---|---|--|-----------|-----------------|---|---------------------------------------|
|   | B. Appoint a Presidential Advisory Group (PAG) to develop plans for additional liaisons for other county/local officials.   | Appoint Liaisons for all cities in DeKalb: Avondale Estates, Brookhaven, Chamblee, Clarkston, Decatur, Doraville, Dunwoody, Lithonia, Pine Lake, Stone Mountain, Stonecrest & Tucker. | President / VP Political Affairs                   | CEO       | June 1          |   | Ed Patton appointed as 2017 PAG Chair |
|   | C. Notify the state association of relationships members have with elected officials, and when appropriate, suggest names for Federal Political Coordinator (FPC) positions. FPC's are REALTOR members who have a relationship with a Federally elected official. FPC's have an initial appointment of 6 years. |   | VP Political Affairs                               |           | Ongoing         |    |                                       |
| 3. Raise funds for RPAC.  |   |   |  |           |                 |   |                                       |
|   | A. Plan, publicize and implement several RPAC Fundraising Events.   | 2016 RPAC events and come up with a self-funding model  | RPAC Fundraising Committee                         | CEO / Dee |                 |    |                                       |
|   | B. Include voluntary RPAC contributions as a line item in the dues bill.  |   |  | CEO       | Ongoing         |   |                                       |
| 4. Report information to the membership about legislative and local elected officials and their activities. |   |   |  |           |                 |   |                                       |
|   | A. Use member newsletters, website and social media.  |   | Political Affairs / Communications & PR Committees | CEO / Dee | Monthly Reports |  | <i>Done, but not monthly</i>          |
| 5. Maintain relationships with legislative and local governing body officials.                              |   |   |  |           |                 |   |                                       |
|   | A. Work with the state association to make RPAC presentations for appropriate elected officials.  |   | Political Affairs Committee                        |           | Ongoing         |  |                                       |

|  |  |  |  |   |     |   |   |                                    |
|--|--|--|--|---|-----|---|---|------------------------------------|
|  |  | B. Assign local Association RPAC Trustees to meet with candidates for office, and select those individuals to recommend to the state association for RPAC funds. |  | VP Political Affairs / Chair, RPAC Trustees | CEO | Ongoing, prior to State Association deadlines |    |                                    |
|  |  | C. Require Leadership Academy students to attend a meeting of the county commissioners or the School Board.  |  | Leadership Academy Dean                     |     | March 1                                       |    |                                    |
|  |  |  |  |   |     |   |   |                                    |
| <b>VI. Review Programs, Activities, Governance Structure, Policies and Resources to Meet or Exceed NAR Core Standards for Local Boards / Associations, Enhance Volunteer Involvement and Effectiveness in meeting the Needs of the Association and its Members</b> | 1. Serving as the Strategic Planning Committee, the Executive Committee will review the Strategic Plan at least annually to evaluate its ability to meet NAR Core Standards, enhance volunteer improvement, and effectiveness in meeting the needs of the Association and its members. | Come up with a budget for a Strategic Planning retreat offsite for 2 days, 1 night only.   |  | President-Elect                             | CEO | April   |    |                                    |
|  | 2. Submit to the Bylaws & Policy Committee needed changes to those documents.  |  |  | President-Elect                             |     | Ongoing                                       |    |                                    |
|  | 3. Hold annual orientation for Officers, Committee Chairs/Vice Chairs, State Directors, Board of Directors and others, as needed.  |  |  | Incoming President / President-Elect        |     | Fall  |    | <i>Leadership Team Orientation</i> |
|  | 4. Regularly hold staff meetings to ensure compliance with policy, and review status of work to meet the Strategic Plan.   |  |  |   |     | Ongoing                                       |  |                                    |
|  |  |  |  |   |     |   |   |                                    |













