



Strategic Visioning Zoom Retreat Results of Sessions 1 & 2 May 28, 2020

Introduction

The Board of St. Charles REALTORS® met on Zoom conferences on May 21st and May 28th, 2020 for the purpose of addressing key issues facing the Association.

MISSION STATEMENT

St. Charles REALTORS® unites to advocate for real property rights, delivers educational programs that advance professionalism, connects members and the community through outreach, and is accountable and transparent to the membership.

STRATEGY I - PROFESSIONALISM

We wish to raise the standards of excellence for REALTORS® and address the agents who do not practice as professionals?

Initiative 1 - Licensing and the Cost of Membership

- ➔ Raising the licensing requirements for REALTORS® in the State of Missouri would add measurably to the standards of professionalism. There is currently a Task Force at the State level to address raising the licensing requirements.

FURTHER DISCUSSION: How can St. Charles REALTORS® best support and partner with the Task Force on Licensing?



- ➔ Raising the cost of Membership would eliminate many REALTORS® who have few closings and tend to be the least knowledgeable and professional.

FURTHER DISCUSSION: Is the Association willing to take a dramatic reduction in membership revenue that will result in raising the cost of memberships?

Initiative 2 - Ethical Violations

- ➔ Anonymous complaints can be a learning opportunity. Is the Board willing to file complaints as a group?

FURTHER DISCUSSION: How can the Association publish complaints as learning examples? (without names)

Initiative 3 - Engaging Brokers

- ➔ Brokers set the tone for Professionalism amongst their Agents. Creating a partnership between Brokers and the Association is essential in addressing the standards of professionalism.
- ➔ Consider creating Broker Quarterly Forums for education and share best practices. Can we revisit Broker Breakfasts? Would it be more effective to invite Brokers together by geographic areas?
- ➔ **FURTHER DISCUSSION:** Do we have a Broker Engagement Committee to address this initiative? How can the Association bring independent and franchise brokers together? How can we effectively engage Brokers?
- ➔ St. Charles County Independent Brokers (SCCIB) are already meeting.
FURTHER DISCUSSION: How can we create similar groups like SCCIB?

STRATEGY II – VALUE OF MEMBERSHIP

Our value proposition needs to be measured by how effectively we can assist our Members in becoming successful and profitable.

Initiative 4 - Education & Public Relations

- ➔ Expand Professionalism in our Education Programs. Possibly include a course on “Rules of the Road for REALTORS®” that addresses both the legal and appropriate behavior of REALTORS®.



FURTHER DISCUSSION: Should the Education Committee be tasked with reviewing our current education programs to determine how best to address professionalism?

- ➔ Is there a more effective meeting format for Affiliates, possibly on Zoom?

FURTHER DISCUSSION: Assign to the Affiliate or Education Committee.

- ➔ Our Members value education. Can we upgrade monthly panels to quarterly guest speakers? Should we examine options for free and paid CE? Would a budget for instructors attract better course facilitators?

FURTHER DISCUSSION: Assign to Education Committee

Initiative 5 – Member Communication

- ➔ Improve our Member communications with more programs on video. Can we create a video newsreel that shares member benefits and recaps what the Board is doing for you? Can our Marketing Company assist in promoting our Value of Membership?

FURTHER DISCUSSION: Determine if Staff, Marketing Committee or Marketing Company can propose an improved Member Communication Plan for 2021.

STRATEGY III – GOVERNANCE AND BOARD & COMMITTEE EFFECTIVENESS

Initiative 6 – Effective Board Meetings

- ➔ Too often, Board discussions become committee work. This is not an effective use of the Board's time and devalues the committees. We must discipline ourselves to not do the work of our committees. We need to understand the difference between governing and managing.

FURTHER DISCUSSION: Discuss the importance of the Board avoiding the tendency to do committee work. Very often, a Board Member needs to raise the question, "Should this be delegated to a committee?"

Also, consider adopting a Board Meeting Evaluation Form (see attached). This simple form is completed by all participants at the end of a Board meeting. The lowest scoring item is added to the next agenda for the Board to agree on one way to improve that skill.

FURTHER DISCUSSION: Consider adopting a Board Meeting Evaluation.



Initiative 7 – The Board Speaks with “One Voice”

- ➔ The Board speaks with One Voice. This is critical for Staff, Committees and Members to understand the directions and instructions of the Board.
FURTHER DISCUSSION: Consider reviewing the Governance Presentation (see attached) with all Board Members. You may wish to add the One Voice Rule to New Board Member Orientation.

Initiative 8 – Strengthen Committees

- ➔ We want to strengthen our Committees by sharing our Strategic Plan, to expand committee membership beyond Board Members and provide training on conducting more effective meetings,
FURTHER DISCUSSION: Provide better direction for our Committees when the Board rejects or changes a committee's recommendations.
- ➔ Mark will be in touch with Bruce Matza to schedule several Mini-Leadership Zoom sessions for Chairs and Vice Chairs of Committees.

STRATEGY IV – ADVOCACY (Required by NAR)

- ➔ St. Charles REALTORS® will be seen by the public, media, and elected officials as the leading advocate for private property rights and real property ownership.
- ➔ We will actively engage on issues ranging from diversity and public education to economic development.
- ➔ We will educate our members on the value of our REALTOR® Party involvement.
- ➔ We will exceed participation rates in RPAC investments and NAR/State calls for action.

STRATEGY V – COMMUNITY OUTREACH (Required by NAR)

- ➔ St. Charles REALTORS® will be the “Voice of Real Estate” by educating consumers on market statistics and real estate issues/trends that impact property ownership.
- ➔ We will raise our profile through community involvement in charitable and civic organizations.
- ➔ We will promote the value of using a REALTOR®.
- ➔ We will work collaboratively with community groups and organizations that share our goals.

