

2010-2013 Strategic Plan

Pennsylvania Association of Realtors®

(approved January, 2011)

Mission Statement:

The Mission of the Pennsylvania Association of Realtors® is to protect private property rights, facilitate a consistent and reliable marketplace, and promote the professional, ethical and profitable practice of real estate.

Vision Statement:

PAR Members value the experience provided by Realtor® organizations.

PAR's Core Customer

The Core Customers of PAR are the local associations that serve the members.

Strategic Goals

Goal 1 Operational Excellence

PAR will provide great value to the members by creating a strategic-based culture.

Goal 2 Political Advocacy

PAR will lead the statewide effort to position the Realtor® organization as the most effective advocate for business and private property rights in Pennsylvania.

Goal 3 Professional Leadership

PAR will take a leadership role in defining and promoting the professional, ethical and competent practice of real estate.

Goal 4 Value Proposition

PAR will lead the way in coordinating, creating, and marketing the Realtor® organization's value proposition in Pennsylvania.

Goal 1 **Operational Excellence**

PAR will provide great value to the members by creating a strategic-based culture.

Desired Outcomes:

- Re-align PAR's financial structure with a target of balancing dues/non-dues revenues to a 60/40 mix
- Reduce the complexity of PAR's operational structure
- Create a more meaningful volunteer experience at PAR
- Increase participation of PAR members in leadership positions at NAR.

Objective 1.1

Evaluate the internal structure of all PAR subsidiaries, boards and sub-groups to eliminate duplication, create efficiencies, and ensure all entities align with PAR Mission.

Possible Action Plans

- A. Perform a structural audit of the for-profit and not-for-profit entities in PAR and find ways to reduce complexities and required staff resources.
- B. Combine or eliminate internal brands wherever possible.
- C. Establish guidelines to evaluate each entity's relevance to the Mission.

Objective 1.2

Create a sustainable, long-term based financial structure for PAR and related entities.

Possible Action Plans

- A. Establish benchmarks for judging the financial success of PAR.
- B. Adequately fund all PAR entities that exist after completing Objective 1.1.
- C. Evaluate/review investment and reserve guidelines.
- D. Consider conservation and sustainability best practices in order to reduce costs.

Objective 1.3

Encourage volunteer leadership participation at NAR and establish systems to channel the information and contacts of these leaders throughout the Realtor® organization in Pennsylvania.

Possible Action Plans

- A. Find ways to communicate the value and benefits of member involvement at NAR.
- B. Set goals, timelines and guidelines for moving PAR members forward in leadership positions at NAR.
- C. Review and implement the appropriate recommendations from the NAR Involvement PAG.
- D. Continue to fund leadership positions at NAR.
- E. Find ways to share successful PAR programs and services with other state associations.
- F. Find ways to network PAR leaders with other state leaders in Region 2 and throughout the country.

Goal 2 Political Advocacy

PAR will lead the statewide effort to position the Realtor® organization as the most effective advocate for business and private property rights in Pennsylvania.

Desired Outcomes:

- 50% increase in the number of Realtors elected to the state legislature, or highest local-level governing body by 2013.
- 90% success rate with Realtor® Party candidates getting elected
- Pennsylvania ranked as one of the [top 10 pro-business states](#)
- Private property rights are considered a sacred issue by local and state officials

Objective 2.1

Establish Keystone Analytics as the most credible polling and data source in Pennsylvania.

Possible Action Plans

- A. Identify a few key political races to demonstrate the effectiveness of Keystone Analytics to win elections.
- B. Use the successful election results as examples to encourage selling service to other local and state races.
- C. Produce and publicize pre-election polls in high-profile races to establish Keystone Analytics as the most credible election polling service.
- D. Find non-political, high-profile uses for Keystone Analytics to enhance its reputation and value.

Objective 2.2

Position the Realtor® organization as the voice of real estate by providing valuable information to local association leaders, politicians, the media, and others as appropriate.

Possible Action Plans

- A. Set up a systematic distribution of real estate market information to local associations.
- B. Investigate other options for the collection and analysis of real estate market data.
- C. Utilize new tools such as RPR, Realtor.com's Find, and others to gather and analyze data.

Objective 2.3

Create a long-term plan for identifying and encouraging qualified Realtors® to run for public office.

Possible Action Plans

- A. Look for other successful models, both inside and outside the Realtor® organization, that have resulted in encouraging candidates to run for office.
- B. Use Keystone Analytics to identify Realtor® candidates for public office.
- C. Establish benchmarks for the current and desired number of Realtors® in public office.

Objective 2.4

Investigate the possibility of establishing a pro-business policy think-tank by partnering with other like-minded organizations to present a unified voice in public policy.

Possible Action Items

- A. Identify other pro-business organizations that are currently operating on a local or statewide basis.
- B. Approach other organizations (including local Realtor® Associations) to join the partnership as founding members.

Goal 3 Professional Leadership

PAR will take a leadership role in defining and promoting the professional, ethical, and competent practice of real estate.

Desired Outcomes:

- 25% increase in the member impression of the professionalism of other members
- Increase educational standards/requirements for new and current licensees
- Establish transparent benchmarks for what constitutes a professional real estate agent

Objective 3.1

Investigate the establishment of a professional evaluation system that holds Realtors® accountable for their performance and provides transparency for the public.

Possible Action Plans

- A. Define criteria for the professional evaluation system.
- B. Find a 3rd party partner to ensure the ratings are perceived as credible by the public.
- C. Investigate the possibility of including all licensees in the evaluation system.

Objective 3.2

Implement the approved recommendations of the Professionalism and Education Requirements Task Force.

Possible Action Plan

- A. Evaluate other successful state association efforts to pass similar legislation.
- B. Share results of current surveys and consider additional data needed to present to legislators.
- C. Work with local associations and proprietary schools to assure a unified voice from the profession before addressing the issue legislatively.
- D. Develop a comprehensive plan to get legislation approved that supports the education and licensing requirements suggested in the recommendations.

Objective 3.3

Investigate a partnership with the State Real Estate Commission to become the administrator of the educational requirements for real estate licensing including course development/approval, tracking of educational credits, instructor development/approval, and cataloging of course offerings.

Possible Action Plans

- A. Perform a cost analysis to show PAR can provide a better service to licensees and save the state money through this public/private partnership.
- B. Identify key policy makers who can champion this partnership.
- C. Seek legislation (if needed) to enable the partnership.

Goal 4 Value Proposition

PAR will lead the way in coordinating, creating, and marketing the Realtor® organization's value proposition in Pennsylvania.

Desired Outcomes:

- Define the primary roles of each level of the Realtor® organization
- Create a clearly defined value proposition for the Realtor® organization in Pennsylvania
- Evaluate new and existing programs based on the value they provide to members

Objective 4.1

Evaluate current programs for relevancy and establish new programs that provide opportunities for members to experience the value of the Realtor® organization.

Possible Action Plans

- A. Set up an internal evaluation system to constantly monitor the value/relevancy of programs and services, and explore other opportunities.
- B. Investigate the value of establishing a fee-based brokerage consulting service to help firms achieve their goals of being professional, ethical, and profitable.
- C. Investigate the possibility of starting a PAR Appraisal Management Company similar to the one in Michigan.

Objective 4.2

Customize valuable programs and services for local associations based on their needs, abilities and resources.

Possible Action Plans

- A. Collaborate with local associations to create a list of services to which all members should have access and define which services are the primary responsibility of the local association and which are PAR's responsibility.
- B. Define which PAR services are core services that are funded by dues and which are to be provided at an additional cost.
- C. Investigate the value of starting a fee-based PAR association management service that can assist local associations in delivering core services to members.

Objective 4.3

Develop an internal marketing and communications campaign to create a feeling of value within the membership.

Possible Action Plans

- A. Evaluate the benefit of hiring a professional consultant to organize coordinated internal messaging with local associations.
- B. Engage members and local associations focusing on their preferred methods of communication.

Objective 4.4

Create a more engaged and diverse membership base at the local level with the intent of establishing a solid foundation of leaders at both the local and state level.

Possible Action Plans

- A. Implement PAR's Multi-cultural Strategic Plan with emphasis on supporting local association efforts.
- B. In partnership with the local associations, enhance the LeadershipPAR program and increase the number and diversity of members who participate.

Other Recommendations of the Strategic Planning Committee:

1. Evaluate the length of the Business meeting schedule to determine if they can be condensed.
2. Eliminate the Local and Firm Forums from the schedule of the Business Meetings. Bylaws may need to be adjusted before this can be done.
3. Look at the possibility of combining other retreats and meetings including the Leadership Retreat, Local Leader Orientation, spokesperson training and the AE Retreat.
4. Permanently eliminate the Past Presidents Retreat and evaluate others ways to keep these important members active and engaged.
5. Establish a Strategic Oversight Committee to monitor, adjust and implement the Strategic Plan.

2010 Strategic Planning Committee

1. **Chair, Ron Croushore**
2. **Frank Jacovini**
3. **Bette McTamney**
4. **Chris Beadling**
5. **Bebe English**
6. **Ellen Renish**
7. **Paul Garvey**
8. **Ann Marie Matteo**
9. **Bill Sieg**
10. **Bob Freeman**
11. **Mike Pion**
12. **Kathy McQuilkin**
13. **Raul Azpiazu**
14. **Joe Peterson**

PAR Staff Participants

1. **Brenda Florida**
2. **Thea Hocker**
3. **Marty Manion**
4. **Hank Lerner**
5. **Jim Antonio**
6. **Derenda Updegrave**

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