



Strategic Plan 2020-2022

BACKGROUND

Strategic planning for the future is essential for any organization's success. Identifying the strategies that will not only sustain the organization but prioritize the use of limited resources, structure programs and member benefits effectively and efficiently and provide an opportunity for growth are critical to LCBR's continued service to its membership.

Litchfield County Board of REALTORS® (LCBR) is a trade association for licensees who work in the real estate industry. The association is governed by a local board of directors made up of licensed brokers and salespeople that are members of LCBR. We are one of 19 local boards/associations across the State of CT that belong to the state association, CT REALTORS®. The local boards/associations collectively represent approximately 17,000 individual members statewide making Connecticut REALTORS® Connecticut's largest professional trade association.

OUR MISSION

Litchfield County Board of REALTORS' (LCBR) mission is to promote excellence in the real estate industry by promoting and advocating for ownership of real estate in Litchfield County, Connecticut.

OUR VISION

Litchfield County Board of REALTORS® (LCBR) aspires to be held in the highest regard by its members, the community and Connecticut REALTORS®.



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OUR VALUES

Delivering superior membership services and benefits is at the heart of everything Litchfield County Board of REALTORS® (LCBR) does. We work proactively to identify members' needs. We demonstrate our commitment to our members, CT REALTORS® and National Association of REALTORS® through our active participation and financial support of local, state and national activities. We act honestly, ethically and professionally in all our dealings while abiding by a strict code of ethics established by the National Association of REALTORS®.

OUR PLAN

To accomplish our mission and vision and to remain true to our values, LCBR must have a clear focus on sustaining our independence and in evaluating economic, regulatory and financial conditions that influence our long-term success.

This is a challenge for a small association so six strategic themes have been identified as the basis for framing our work. Each theme contains its own objective measures and strategies to be implemented and monitored. The strategic themes are:

1. Legal and Professional Standards
2. Information and Technology
3. Leadership and Governance
4. Education
5. Advocacy
6. Member, Affiliate and Community Outreach



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Strategic Theme:	Legal and Professional Standards
Vision:	To provide legal and ethical guidance to the members.
Strategic Outcomes:	<p>We will be successful when:</p> <ul style="list-style-type: none"> • members are informed of legal/ethical issues and pitfalls in their practice of real estate; and have the necessary knowledge to avoid violations of law and ethics. • members will actively participate in and attend legal roundtable events. • mediation, ethics and arbitration services will be rarely needed. • REALTOR® is held in high esteem and respected by the public. • members are using available, no fee, resources such as the CTR legal hotline.
Strategies:	<p>To achieve this vision, LCBR will:</p> <ul style="list-style-type: none"> • retain counsel for its own legal needs. • provide risk management programs for its board and members. • provide periodic legal updates significant to the real estate industry, including legal roundtables. • offer mediation, ethics and arbitration services. • promote and protect the term “REALTOR®”.
Responsible Party:	Board of Directors & Executive Officer



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Strategic Theme:	Information and Technology
Vision:	To make information available to the members and public.
Strategic Outcomes:	<p>We will be successful when:</p> <ul style="list-style-type: none"> • LCBR is considered a trusted source of real estate industry information by our members and the public. • LCBR is able to provide training and education to meet the membership's continuing education requirements. • LCBR provides additional training/education opportunities for members wishing to improve their skills or whom seek to earn designations and certifications. • LCBR meets the membership's needs for lockboxes.
Strategies:	<p>To achieve this vision, LCBR will:</p> <ul style="list-style-type: none"> • collect and disseminate information germane to the real estate industry. • Develop and implement a social media plan that may include platforms such as Facebook, Twitter, Instagram, SnapChat and LinkedIn. • utilize current technologies and provide training. • provide lockboxes. • provide literature and guidance on where to get information. • employ technology to accommodate virtual meetings. • seek out member discounts from retailers such as Staples, Sprint, T-mobile, AT&T and Verizon.
Responsible Party:	Board of Directors, Executive Officer, Education Committee



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Strategic Theme:	Leadership and Governance
Vision:	To assure volunteer and board resources are used optimally.
Strategic Outcomes:	<p>We will be successful when:</p> <ul style="list-style-type: none"> • we have an engaged and growing pool of member volunteers to fill seats on the board and committees. • we continuously meet the expectations of the State and National associations, including core standards. • we are nimble and responsive to member needs, legal and regulatory changes and mandates. • our members do business professionally, ethically and complaints are minimal. • the board and executive officer continuously explore and consider opportunities for membership growth and increase non-dues revenue. • a strategic partnership between local boards/associations allows for the utilization of shared services while striving to maintain individual board/association identities and commitment to respective membership and communities. Partners have a willingness and desire to work together to achieve the common goal of supporting our members and communities.
Strategies:	<p>To achieve this vision, LCBR will:</p> <ul style="list-style-type: none"> • assure effective volunteer leadership and board staff at the local level. • strive to support the State and National associations. • maintain an effective “results-oriented” system of governance which is flexible and responsive. • promote the professionalism and ensure the ethical conduct of its members. • ensure compliance with, and uniform application of, all governance policies and standards. • protect, and support a statewide MLS. • explore opportunities for growth. • offer incentives for participation on LCBR committees; free CE classes. • network with other boards, sharing ideas, inviting their members to events and educational opportunities.



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- explore developing strategic partnerships with other boards/associations focusing on:
 - Preserving reserves,
 - finding scale in office operations
 - attracting and retaining members
 - maintaining brand (LCBR) and community independence
 - a commitment to efficiencies
 - trust among partners
 - synergies in current operations

Responsible Party:

Board of Directors, Executive Officer, Budget Committee



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Strategic Theme:	Education
Vision:	To assure that members have access to quality educational programs and products that enhance their ability to succeed.
Strategic Outcomes:	<p>We will be successful when:</p> <ul style="list-style-type: none"> • we provide quality educational programs directly or in partnership with college(s)/accredited real estate schools that are well attended and provide revenue to the association. • we have established relationships with other boards to share educational resources, reduce costs to members and create revenue to the association. • new members are on-boarded effectively and given the necessary tools and information to be active and successful members of the association. New members understand the rules of the road and have the necessary resources to ask for assistance. • individuals interested in real estate as a career path are engaged by LCBR, attend our Introduction to the Real Estate Profession events and our membership grows as a result of recruiting new real estate agents into the profession. Local high schools and colleges embrace the program and make it part of their school to career curriculum.
Strategies:	<p>To achieve this vision, LCBR will:</p> <ul style="list-style-type: none"> • identify, evaluate, create if necessary, and make available quality educational programs (i.e., Equal Opportunity, Risk Reduction, etc.). • provide new member orientation, which includes the mandatory Code of Ethics training and information about LCBR. • disseminate information and/or explore cooperative efforts about educational programs available through the Institutes, Societies and Councils and the rest of the -REALTOR® family. • seek sponsors to underwrite the cost of education of the membership; free or reduced cost when possible. • provide quality education programs that span our entire geographic jurisdiction. • promote continuing education programs available through the C.E. Shop. • seek out and create educational partnership(s) with local college(s) and/or accredited real estate schools. Establish a referral system with the college(s)/accredited real estate schools whereby LCBR receives an income stream from them.



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- create and host an Introduction to the Real Estate Profession event for the general public, discuss topics germane to the profession and offer advise and information on how to become a real estate salesperson or broker. Present at local high schools and community colleges.

Responsible Party: Board of Directors, Executive Officer, Education Committee

Strategic Theme:	Advocacy
Vision:	To promote advocacy efforts which benefit the real estate industry.
Strategic Outcomes:	<p>We will be successful when:</p> <ul style="list-style-type: none"> • our members are following legislative and regulatory issues and are aware of the state and national associations' positions. • our members understand the impact emerging issues will have on their business and the real estate industry. • our members use resources and avenues available to them to make their opinions known to local and state legislators and that our members will fight to protect property ownership rights. • our members financially support RPAC and our association meets or exceeds our RPAC fundraising goals. • our members (50%) are registered to receive call to action texts from NAR and CTR. • our members on average (50%) respond to calls to action. • we host a well-attended Equal Opportunity in Housing event annually. • our members understand their fair housing responsibilities and abide by the regulations; fair housing complaints involving our members do not exist. • RPAC phone banks or other RPAC fundraising campaigns are held at least once a year and we meet or exceed our financial goal for the event.
Strategies:	<p>To achieve this vision, LCBR will:</p> <ul style="list-style-type: none"> • review and disseminate to its members NAR and CTR positions on emerging issues and policy positions.



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- post notices on social media, bulletin boards and newsletters referencing legislative information available on CTR's and NAR's websites and social media outlets.
- educate new member orientation attendees about NAR's, CTR's and LCBR's political advocacy programs and efforts.
- identify and address legislative issues and regulations which affect the profitability of REALTORS® and their firms.
 - maintain a Legislative Committee.
 - provide our legislators and our members with the annual list of CTR's legislative issues.
 - provide our members with opportunities to interact with their state and local leaders.
- encourage engagement in the political process.
 - foster relationships between our members and the legislators and local leaders in our board's jurisdiction by hosting legislative events such as Legislative Night, Meet the Candidates and Local Leadership Breakfast.
 - promote and encourage members to attend CTR's REALTORS® Rally.
 - promote calls for action from NAR and CTR to our members.
 - encourage members to sign up for calls for action text alerts.
 - encourage members to review the for REALTORS® section of the REALTOR® Action Center.
 - encourage brokers to participate in the Broker Involvement Program.
- help CTR and NAR to address public policy issues.
 - promote calls for action to the public through the board's social media outlets.
 - encourage members to promote calls for action to their clients.
 - provide NAR with the contact information for our local leaders so they may mail them a copy of the On Common Ground Magazine.
- support policies and programs which assure equal housing opportunities.
 - maintain an Equal Opportunity in Housing Committee.
 - host an Equal Opportunity in Housing Program which is free, open to the public and designed to educate tenants and landlords regarding their rights and responsibilities and REALTOR® members regarding their responsibilities pertaining to rental and Fair Housing regulations.
- Encourage participation in RPAC by its members.



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- host an RPAC phone bank
- send an annual plea for contributions from the Legislative Committee Chair and/or Co-Chair.
- provide new member orientation attendees with RPAC donation envelopes and explain the importance of RPAC.
- suggest contributions to political advocacy initiatives.

Responsible Party:	Board of Directors, Executive Officer, Legislative Committee, Fair Housing Committee,
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Strategic Theme:	Member, Affiliate and Community Outreach
Vision:	To show the value proposition to the membership and public
Strategic Outcomes:	We will be successful when: <ul style="list-style-type: none"> ● 50% of the membership attend at least one membership meeting annually.
Strategies:	To achieve this vision, LCBR will: <ul style="list-style-type: none"> ● provide networking opportunities in order to foster and enhance professional relationships. <ul style="list-style-type: none"> ○ host programs such as Award Night, Legal Round Table and Networking After Hours. ○ provide affiliate members the opportunity to host Lunch ‘n Learn programs for our members at the board office. ● LCBR is the voice for real estate for Litchfield County. <ul style="list-style-type: none"> ○ promote real estate statistics and data provided by CTR and NAR through our board’s social media outlets. ○ share HouseLogic’s articles, videos, etc. on our board’s social media, website and newsletter. ● offer member benefit/discount programs. <ul style="list-style-type: none"> ○ contact local business to inquire if they will provide our members discounts for their goods and services. ● continue to support and implement community outreach programs and events.



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- support Habitat for Humanity Northwest CT by coordinating a REALTORS® Work Day and/or by contributing a financial donation.
- hold our annual fundraiser program to raise funds for two local charities, on a rotating basis, from our board's list of approved charities.
- collect holiday presents for children in our local area.
- collect contributions for our "Have a Heart for Kids" program which provides gift cards to our local Department of Children and Families for use in the creation of placement packs for children taken into foster care.
- collect contributions from our members for our T.J. Zappulla Scholarship Grant.
- collect toiletries to benefit homeless people in our community.
- articulate our value to the membership and have active participation among members; knowing the value and selling the value.
- update the board office to project a modern, professional image.

Responsible Party:

Board of Directors, Executive Officer, Public Relations Committee