



**California State Chapter
Women's Council of
REALTORS®**



STRATEGIC

PLAN

◆ 2011-2013

**DRAFT
October 7, 2010**

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State Chapter Purpose and Vision

Statement of Purpose

The purpose of the California State Chapter of the Women's Council of REALTORS® is to support local chapter excellence in serving the members, and to develop strong leaders for the Council, the profession and the community.

State Chapter Vision

In pursuing its purpose, the State Chapter strives to become the following organization.

- ◆ To be a valued resource for local chapters, customizing support to meet each chapter's operational needs, and providing a range resources, including training, mentoring, recognition and tools.
- ◆ To be a model for local chapter excellence in leadership, operations and programming.
- ◆ To foster the development of leadership skills, ensuring the success of those taking on positions within the Council, as well as others who seek to influence change and enhance success in their business, in the industry and within the broader community.
- ◆ To be the voice for the unique value of Women's Council of REALTORS® in the State of California, and to further the profession by leveraging the influence and expertise of women in the industry through productive relationships with California Association of REALTORS® and other business women's organizations.
- ◆ To provide unique learning opportunities for local chapter leaders and members that model innovative programming, enhance leadership skills or showcase the distinctive value of Women's Council of REALTORS® at the state level.
- ◆ To be responsive to those the State Chapter serves, operating efficiently with a streamlined structure, leaders who are trained to provide needed support and are accountable for results, adequate administrative capacity, and efficient systems for gathering and reporting information.
- ◆ To maintain a sharp focus as a team on our purpose and goals and to maximize the use of our resources to achieve them.

◆ 2011-2013 State Chapter Strategic Plan

** indicates a top priority for 2011

Key Result Area: CHAPTER EFFECTIVENESS

Long-term Goal: Create and operate a customized chapter support program that targets the diverse needs of local chapters around the state.

2011 Action Steps and Priorities

1. **Review best practices and develop regional business forum guidelines. (Guidelines to include: criteria for relevant program topics, budgeting, VIP protocol, agenda templates for business forum meetings and forum planning meetings facilitated by DVPs and Governors, sponsorship/fundraising ideas, evaluation, etc.)

Assignment	Lead: GOV/DVP & Line Officers
	Supporting: LCP & PE
Completion Date	Done, posted on website

2. **Conduct planning workshops at both the state and local levels for local presidents and presidents-elect. Workshops to include multi-year planning, business planning and ensuring smooth transitions between leaders.

Assignment	Lead: Line Officers
	Supporting: GOV/DVP/LCP
Completion Date	Current meetings & Ongoing

3. Review local chapter reports on business plan progress to identify need for targeted support by DVPs and Governors. Use successful chapters to mentor others in their areas of strength.

Assignment	Lead: Task Force (Linda Lee, 2011 Chair)
	Supporting: GOV/ DVP/LCP/PE
Completion Date	Ongoing

4. Use State Chapter programs to model effective delivery and content of relevant programming for local chapters.

Assignment	Lead: Task Force
	Supporting: President & Education & Program Chair/committee
Completion Date	In progress

5. Create and publicize a link on the State Chapter website for local chapters to access information on successful program topics and speakers used by others.

Assignment	Lead: National WCR
	Supporting: Line officers, Gov./LCP/LCP
Completion Date	Provided by National

2012-13 Strategy

1. Conduct an annual evaluation of the Business Plan and suggest possible changes.

Key Result Area: LEADERSHIP

Long-term Goal: Design and implement a leadership development strategy that strengthens the influence and visibility of the Women’s Council of REALTORS® within the real estate community at the state level, and identifies, supports and leverages the leadership potential of members.

2011 Action Steps and Priorities

1. Develop a survey of State Chapter meeting attendees to gather information on their personal profile, interests and goals.

Assignment	Lead: Membership Committee
	Supporting: Line Officers
Completion Date	Once a year in May meeting

2. ****Broaden the charge of the National Focus Committee to consider members for leadership and involvement opportunities and pathways beyond those within Women’s Council (e.g., CAR). Use member profile survey results to identify members.**

Assignment	Lead: National Focus
	Supporting: Membership
Completion Date	Once a year in January

3. Report to members the success the State Chapter has had in placing members in various leadership roles.

Assignment	Lead: National Focus Committee
	Supporting: Appointee’s
Completion Date	Ongoing

4. **Appoint a task force to develop a training format and guidelines for DVPs and Governors at the State Leadership Retreat.

Assignment	Lead: Line Officers
	Supporting: Gov/DVP
Completion Date	Review & update annually

2012-13 Strategies

1. Provide local chapters with survey tools they can use to gather member profile information at the local level.
2. Secure standing positions for Council members on selected CAR committees.
3. Standardize training format and guidelines for DVPs and Governors at the State Leadership Retreat.
4. Develop recommendations for local chapter leader use in building productive relationships with their local Boards. Amend the local chapter leader job description to include this responsibility.

**Key Result Area: PROMOTION OF WOMEN’S COUNCIL OF REALTORS®
VALUE/BRAND**

Long-term Goal: Fully integrate the National Women’s Council of REALTORS® mission, vision and values into all State Chapter programs, activities and communications.

2011 Action Steps and Priorities

1. **Produce three Council ‘value spots’ consisting of a short educational tip or technique and a Women’s Council branding message. Disseminate to local chapters and individual members to use to promote membership and involvement in the Council.

Assignment	Lead: Marketing Task Force
	Supporting: Line Officers/GOV/DVP
Completion Date	Commence in 2012

2. Provide training for local chapter leaders on how to use new Women’s Council marketing materials to promote Council membership in various settings (e.g., Facebook page, You-Tube, program flyers, chapter website, etc.).

Assignment	Lead: Break Out Sessions
	Supporting: Education & Program
Completion Date	Ongoing

3. Conduct a program for local chapter leaders on best practices in recruitment and retention strategies for year-round use.

Assignment	Lead: Membership
	Supporting: Awards & Recognition
Completion Date	Ongoing

4. Design a targeted broker and local Board recruitment strategy for use by local chapters in recruiting members. Train the DVPs and Governors to work with chapters on this.

Assignment	Lead: Brokers Group Task Force
	Supporting: Membership
Completion Date	Survey to Brokers/owners

2012-2103 Strategies

[none at this time]

Key Result Area: GOVERNANCE

Long-term Goal: Ensure the structure and resources of the State Chapter are focused on the development and support of local chapters and their leadership. Build adequate resources to fulfill the State Chapter purpose.

2011 Action Steps and Priorities

1. **Evaluate the current State Chapter committee structure, moving toward a 'steering committee' concept. Draft steering committee scopes and charges, and review bylaws in order to propose any necessary changes based on the evaluation.

Assignment	Lead: Line Officers
	Supporting: GOV/DVP
Completion Date	Commence 2012

2. Evaluate tools available for use by chapters in conducting multi-year planning.

Assignment	Lead: National
	Supporting: LCP
Completion Date	ongoing

3. Identify like-minded real estate groups and create a forum to exchange ideas and expertise on a regular basis.

Assignment	Lead: Mastermind group
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	Supporting: Line Officers/GOV/LCP?
Completion Date	Ongoing

2012-2103 Strategies

1. Make multi-year planning tools available to chapters.
2. Implement new State Chapter committee structure.