



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

**STRATEGIC
FRAMEWORK and
2017-2020
STRATEGIC PLAN**

Updated: October 7, 2018

For Review Spring 2019

Approved: January 25, 2017

We are a network of successful REALTORS®, advancing women as professionals and leaders in business, the industry and the communities we serve.



Women's Council of REALTORS®, California Strategic Framework

Statement of Purpose

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

Vision Statement

Women's Council of REALTORS®, California is the standard for excellence in local network support, and the premier source for leadership training and development within the real estate industry.

Strategic Goals

Network Effectiveness

The State Network provides the training, tools and support local networks need to consistently meet or exceed network operating standards.

Leadership

The State Network strengthens the influence and visibility of Women's Council within the real estate community, and identifies, supports and leverages the leadership potential of its' members.

Promotion of Women's Council of REALTORS® Value

Every REALTOR® understands the business value of Women's Council membership and the opportunity to develop as a strong leader.

Governance

State Network structure and human and financial resources are focused on fulfillment of the Networks' purpose and provide a sustainable foundation for long-term growth and development of innovative programs and services.

2017-2020 Strategic Plan

** indicates overall priorities for 2017 +added by committee January 2017
++added January 2018 +++added April, 2018 #changed Oct, 2018

STATE NETWORK EFFECTIVENESS

The State Network provides the training, tools and support local networks need to consistently meet or exceed network operating standards.

STRATEGIC ISSUE: STATE WEBSITE

2020 Milestones: Scale of 1 to 5 is at 3

1. Local networks have access to a State Network website that provides them with an easy-to-use, professional, mobile rich resource of information and support.
2. The State Network website provides business value to strategic partners.
3. Hire Website support: **#wait and see once have National template for State use**
4. Network support in uploading local videos to website
5. ~~# Expand role of Admin #~~ removed as not going to be implemented

2017 Deliverables

1. ****Develop the specifications for a refurbished website, solicit proposals and fund.**
Completion Date: April 2017
2. **+Links on CA website to Strategic Partner websites ++ on front page-list/links to Partner sites**
Completion Date: April 2017 Ongoing
3. **+Strategic Partner education opportunities, Completion Date: Ongoing**

2018 Strategies

1. ~~Hire professional Website support~~+++ Embrace National uniform State Websites
++ add Historical pages
2. Add nationally provided videos that support our Strategic Goals
3. ++Electronic communication strategy for Strategic Messages, ie: Slydial
4. ++Consider Website Admin as in-kind Strategic Partner **#wait and see/National website implementation**
5. ++Strategic Partners to have a more active role in the organization-**ongoing-#changed to 30 day lead time for finalizing presentations**

2019 Strategies

1. #Electronic communication system both text and calling

STRATEGIC ISSUE: DVP/GOV EFFECTIVENESS AND ACCOUNTABILITY

2020 Milestones: Scale of 1-5 is at 3

District Vice Presidents and Governors are recognized and respected by local network leaders as coaches, mentors and trainers. #reached turning point, monitor team, use Accountability reports

- District Vice Presidents and Governors are providing a consistent high level of support to local networks.
- +Investigate feasibility of training for District Vice Presidents and Governors.

2017 Deliverables

1. **Shift the role of the District Vice Presidents and Governors to coaches, mentors and trainers, and promote to local networks.
Completion Date: Ongoing (Changed to 3 Districts in 2018)
2. Re-evaluate the requirements for the District Vice President and Governor positions, the selection process, and the training needed to support success +++ reporting midway through the year, accountability measures.
3. **More facilitation training needed at State Leadership Retreat**
Completion Date: In process. Application
3. Develop a mechanism for evaluation of District Vice Presidents and Governors.
Completed: Ongoing
4. Revise Standing Rules
Completed: April 2017

2018 Strategies

1. All leadership team to complete DISC assessment +++ include as budgeted expense
2. Offer mid-year refresher on conflict management for leadership team for follow-up from leadership retreat. **Spring meeting**

+++2019 Strategies

1. ++Go To Meeting/Online Sessions
2. # DVP/Governors Quick Start Guide and Accountability Reports, Seek Transparency
3. #Add mastermind type skill learning opportunity for Governors and District Vice Presidents at 3 Pre-Meetings **Add 2 one in the Spring and one in the Fall at the pre-meeting**

STRATEGIC ISSUE: LOCAL NETWORK OPERATIONS

2020 Milestones: Scale of 1 to 5 is at 3-4

1. A system is in place to support local network compliance with operating standards. Measurable accountability for all local networks.
2. ++Institute Affiliate Agreement (completed but ongoing review) # needs to be upgraded in terms of consequences if not compliant. **Affiliation agreement must be kept stored at the local level and shared at network retreats, so all understand the need to comply.**

2017 Deliverables

1. ++2018 Assemble a project team to evaluate options for monitoring and supporting compliance with local network operating standards (e.g., a 'strike force').
i. Completion Date: Ongoing See 2018 Strategies #2
2. Implement as required a National process to address issue of local network non-compliance.
Completion Date: Ongoing/Done

complete and implement quick start guides.
These to be stored online for historical purposes

4. +Develop a long-term plan for local success. +++need more accountability

Completion Date: In process. ~~Read trip transition workshops, orientations updated. State Team Evaluating Notes See 2018 Strategy #3~~ replaced by Leadership Summit **Transition workshop/forums brought back for 2019**

2018 Strategies

1. All local networks should have ~~Dropbox~~ +++electronic storage in place to keep all network documents: history/transition ONGOING
2. Create a Project Team to help local networks. (Website info, Strategic Partners ++ Strategic Plan)
3. ~~Create more networking at Transition workshop meetings, ++booked at destination point~~
4. **Quick Start guides for all positions created. DONE 2018 ONGOING Need one created for Transition Workshop/Forum**
5. ++More training throughout the year by position see #4 Above
6. ++Full day training for local networks at Fall meeting, include document retention/Dropbox
7. ++Make Financial Check-ups system accountable to operating standard and include in Fall training session
8. ++ Use JotForm at ~~Network~~+++State level

2019 Strategies

1. # Design written program to rebuild networks under 30 members-
2. # Network packets each year, emphasize smooth transition
3. # Joint meetings held by each of the 3 Regions or Areas where appropriate, all State line officers to attend each joint meeting.
4. # Standardize Network Password Protocol **Create outgoing checklist for District Vice Presidents and or Governors to review at local network retreats**
5. # Changes to State and Network Standing Rules
6. # Work with National on Affiliate Agreement to help Networks be more accountable

STRATEGIC ISSUE: NETWORK/REALTOR® LEADERSHIP TRAINING

2020 Milestones: Scale of 1-5 is at 4

1. Multiple delivery mechanisms are in place to provide leadership training.
2. Leadership training is targeted to different levels of leadership experience and positions with the network. **Ongoing Need a process in place to know current members level of knowledge so training is relevant and timely**
3. +Bring back in Members At Large
4. +Utilize the webinars from National Women's Council
5. ~~Create webinars for each Officer position and upload to Women's Council CA, website, ++ concentrate on how to. Nationally provided videos are on National Website.~~
++Changed from 2017-2018 Deliverables to 2018-2019
6. +++Develop program to fund and train leadership

2017 - 2018 Deliverables/Strategies

1. Define core leadership curriculum and identify possible topics and speakers.
Completion Date: Ongoing
2. ~~**Consider transforming~~ TRANSFORM the Fall State meeting into a comprehensive local and state leadership retreat for orientation and training. **#YEAH-DONE and ongoing!**
Completion Date: Starting Fall 2018 and ONGOING
3. +Develop Quick Start guide for parliamentary procedure. +++HAVE AND AVAILABLE
Completion Date: 2018? +++ Use other resources
4. +Develop Quick Start guide for conflict resolution. **Completion Date: 2018? +++ Use other resources**
5. +PMN classes at State level. Discussed pros/cons +++ Provided by local networks #or online

2019 Deliverables

1. #Core curriculum subject modules to be taught by DVP/Governors at each state meeting
2. Focus on plan to bring back Members at Large
3. #Use Zoom and Physical presence as delivery means for training
4. #Use Leadership Development Committee to provide DVP/Governor training to foster incoming Leadership

LEADERSHIP

The State Network strengthens the influence and visibility of Women's Council within the real estate community, and identifies, supports and leverages the leadership potential of its members.

STRATEGIC ISSUE: LEADERSHIP DEVELOPMENT SYSTEM

2020 Milestones: Scale of 1-5 is at 4

- Members are aware of the full range of leadership opportunities available within and outside of the Council and have access to the training and support to successfully pursue these opportunities.
- +Review Pathways to Leadership
- +++Encourage and support/track local networks to support local leadership to be involved at local Associations and C.A.R.

2017 - 2018 Deliverables/Strategies

1. ~~**Implement~~ a Leadership Identification and Development Committee at the State level to foster leadership development at *all* levels of the Council. **Complete-Ongoing 2018 Adding to the Fall State Leadership Summit**
Completion Date: Tested initial design. National still working on this.
2. Develop a process and tool to assess member skills and interests. Create a Google fill-in-able form. **Working on 2018 using some sort of Jot Forms, other ONGOING**

2017 Deliverables

1. ****Develop concise, compelling key messages about the value of Women's Council that leaders at all levels of the organization can deliver consistently to members and the broader REALTOR® community.**
 - i. **Completion Date: Ongoing, utilize messages from National Women's Council**
2. Begin to evaluate a California Network communication system.
 - i. **Completion Date: Working. Facebook used in 2017, ongoing? +++ Leadership Communication: Newsletter, website**

++ 2018-2020 Deliverables

1. An effective communication system is in place at the State level, facilitating a regular two-way flow of information and input between the State and local networks.
2. #Focus on one Key Message a Month in communication
3. #Better/consistent postings to Facebook: project team or line officers?
4. #Use SlyDial or other electronic communication system

STRATEGIC ISSUE: EXTERNAL COUNCIL IMAGE AND RELATIONSHIPS

2020 Milestones: SCALE OF 1-5 is at 4

1. The value and impact of Women's Council is well-known within the Real Estate industry in California.
2. C.A.R. views Women's Council as a partner in achieving its strategic goals.
3. The percentage of women in leadership roles within NAR and C.A.R. is more in line with the percentage of women REALTORS®. **Update this information online**
4. **++Develop data accumulation system +++ and method to track progress, use infographics to disseminate information, one on one meetings with leaders**

2017 - 2018 Deliverables/Strategies

1. Explore, and if feasible, initiate a liaison from the State Network to C.A.R. to build an ongoing collaborative relationship between the two organizations.
++EXPO support
2. ****Support the success of the C.A.R. Women's Outreach Initiative, if approved by the CAR Board of Directors. Ongoing 6/28-6/29 2018**
3. **++Brand Leadership Communications-Ongoing**

GOVERNANCE

State Network structure and human and financial resources are focused on fulfillment of the Network's purpose and provide a sustainable foundation for long-term growth and development of innovative programs and services.

STRATEGIC ISSUE: STATE GOVERNANCE STRUCTURE

2020 Milestones: Scale of 1-5 is at 5

1. The State Network governance structure is streamlined and focused squarely on the Network purpose.
2. The State Network governance structure is engaging more Council members in the work of the State.

2017 Deliverables +++ ONGOING

1. Evaluate the State Network governance structure, ensuring maximum efficiency in State Operations.
2. Incorporate Project Teams into the State Network structure to provide greater flexibility in volunteer opportunities.

2019 Deliverables

1. State to model local networks with regard to Project Teams
2. Rename Secretary position to 1st Vice President to model National Women's Council
+++Motion for FALL meeting MOTION PASSED 10/2018 Done
3. #Reorganize and bundle tasks for Communication/Website Done

STRATEGIC ISSUE: STATE MEETING STRUCTURE AND FOCUS

2020 Milestones: Scale of 1 to 5 is at 4

1. State meetings are providing enhanced training and support for local network leaders.
2. ~~+Rename Secretary position to 1st Vice President is done at the National level.~~
3. #Identify Group of Mentors for New Members

2017 Deliverables / ONGOING

1. **Evaluate the State meeting schedule and focus.
2. Move the election process earlier in the year; ++moved to SPRING meeting IN 2018
3. Develop a mentor program for first-time meeting attendees +++ use District Vice-presidents and Governors
4. Review State standing rules. Completed/Ongoing

2018 Deliverables

++Move Elections to Spring Meeting; change standing rules appropriately. Underway

+++ 2019 Deliverables

1. #Implement electronic voting/elections for Spring meeting
2. #Hospitality Belly Up table at all 3 meetings
3. #Identify Group of Members for New Members and New Member Orientation Attendees

STRATEGIC ISSUE: STATE NETWORK SUSTAINABILITY

2020 Milestones: Scale of 1-5 is at 3

1. The State Network has a more stable mix of revenue streams.
2. A stronger value proposition is in place for strategic partners.
3. +Redesign Fall State Meeting.
4. +Local Networks dedicate more time for Retreat presentations.
5. #Add 2 viable Networks to State Organization

2017 Deliverables

1. **Evaluate new opportunities at both the State and local levels for enhanced value for strategic partners (e.g., opportunities to fund specific projects; use of strategic partner expertise to support Council goals and priorities, etc). **Ongoing**
2. +State President Elect to follow up with Local Network President Elects after Leadership Academy.
+++ Reinforce 360 Network
3. +Create better standards for Local Business Planning Retreats along with standardized agenda. **Ongoing**

2018 +++ 2019 Strategies

1. ~~Networks instructed to dedicate at least 6 hrs to Business Planning Retreats.~~
2. +++Dedicate Business Planning to focus on programs as industry events and leadership pipeline stream, revenue, budgeting, by-laws and standing rules (the basics).
3. #Develop Sponsorship Brochure include opportunities to combine Partners to create visibility including Speaking to membership.
4. #Consider Selling T-Shirts and other Women's Council branded materials.

Strategic Planning Fall Meeting-2018: Dedicate our time and focus major accomplishments completed this year and what are priorities for 2019 using a combination of Strategic Planning and Retreat Priorities

2019 Goals from Leadership Retreat Fall/2018 to be considered to be incorporated into Strategic Plan

- 1) Design program to rebuild networks under 30 members
- 2) Additional training specifically for Governors in addition to retreat
- 3) Add mastermind type skill learning opportunity for Governors and District Vice Presidents at 3 Pre-Meetings
- 4) Hospitality Belly Up table at all 3 meetings
- 5) New strategic plan in 2019 (early by 1 year)
- 6) Electronic voting in May at Spring meeting
- 7) Create project team to prepare and distribute press releases
- 8) Re-organize, add marketing, web site, newsletter project teams to a "bundle" as we have with meeting planning
- 9) 3 core curriculum subject modules to be taught at each state meeting
- 10) 2 new Networks chartered in 2019
- 11) Incorporate Slydial into method of communication - both texting and calls
- 12) Joint meetings held by each of the 3 CA districts, all State line officers to attend each

FOR 2019 and 2020: Strategies to include any incomplete items from previous years.