



2018 Strategic Recommendations Report for Future Design of Vermont Association of Realtors

This is a story about four people named
Everybody, **Somebody**, **Anybody** and **Nobody**.

There was an important job to be done and **Everybody** was sure that **Somebody** would do it.

Anybody could have done it, but **Nobody** did it.

Somebody got angry about that, because it was **Everybody's** job.

Everybody thought **Anybody** could do it, but **Nobody** realized that **Everybody** wouldn't do it.

It ended up that **Everybody** blamed **Somebody** when **Nobody** did what **Anybody** could have done.

Dedicated to the memory of John Bertucci, Meg Streeter Real Estate, a key member of the Task Force





INTRODUCTION

When an organization enters a strategic future-focused planning process, for whatever reason, there is always one common theme. The organization has run out of road going in the direction it was going. Some associations have the *Good News Scenario* where they have been succeeding in evolving into their future. However, more times than not, an association is in the *Bad News Scenario* due to an accumulation of negative circumstances impacting and influencing their viability demanding immediate attention to survive and be of value to its membership. Specific to past missteps that have shaped the association at this moment-in-time, the volunteer leadership may enter the strategic planning process hesitant, cynical, and even resistant. Minimally, there is uncertainty and discomfort regarding what will be revealed during the strategic planning process. *Reasonableness* can dominate.

VAR entered its strategic planning process representing itself more in the latter scenario. The association was becoming aware of the depth of its financial shortcomings, its governance unconsciousness, and its competitive, often conflicting, relationship with its Local Boards (LBs). VAR was coming out of a deeply stagnant period where a succession of command-and-control CEOs determined what the association did and said, plus how it related to its members, volunteer leaders, and staff. *Accountability* was coming into the sunlight but storm clouds still filled the sky.

Bad News...Good News

By voting to fund this strategic planning process, the state leadership took a courageous step into its future, to begin confronting mis-steps and mis-communications that led to mis-understanding of its fiduciary responsibilities. It started addressing new agreement with the membership that would restore trust between LBs and VAR. (See Appendix—5 Dysfunctions of a Team). The breaks in *relatedness* and *transparency* between the VAR and the LBs now were clearly visible and ready for immediate repair.

The VAR Board's (leadership going back a dozen years) has lacked consistently demonstrating their fiduciary duties, established by case law, liability insurance practices, and state corporation law are a major part of the association's breakdown in trust. The missing duties are: Duty of Loyalty, Care, and Obedience (See Appendix— Glossary). Going forward, being rigorous in fulfilling their duties and transparent in their communications with the membership and LB volunteer leaders will go far to mend the disappointment and distrust experienced by VAR's members. VAR can build its way back into the hearts of its members if it proceeds with urgency, consistency, and transparency. The recommendations in this report represent an evolutionary path. Think long-term and think big—*change* is a marathon.

“Sensing the difficulty in producing change, some people try to manipulate events quietly behind the scenes and purposefully avoid any public discussion of future direction.”

—John P. Kotter, *Leading Change*.



RESEARCH APPROACH AND PHILOSOPHY...what we did, where we looked, what we asked

Ask lots of questions. Listen to what is said without judgement. Listen to what is not said.

- Create a Futures Task Force made up of members representing the LBs across the state of VAR with schedule of conference calls, ongoing individual research assignments, collective debriefs, internal and external surveying;
- Convene collaborative one-day live meeting with members and volunteer leaders from across VAR;
- Scan the professional environment by reviewing: NAR state-network website, VAR Locals websites, VAR’s website, and aligned organizations’ websites;
- Conduct Survey Monkey sent to all members;
- Have confidential calls with selected members, volunteer leaders, local and state staff;
- Harvest input from VAR board and staff visits to LBs to engage members and listen;
- Review other associations creating new and using best practices;
- Explore services, events, programs, products, and communications VAR could uniquely offer;
- Track the current membership growth patterns and members’ profile;
- Review VAR’s internal documents to assess existing alignment of Mission to Vision; and
- Review VAR’s policies, procedures, and by-laws.

Additional Areas for Inquiry and Consideration...for each VAR stakeholder cohort:

What does/can *member engagement* look like?

How does/can VAR measure the value of political advocacy?

Which committees matter most for future of association?

Who are the *champions* representing the ongoing value of VAR?

What difference could be made if Realtors® were recognized leaders in their community, state, national (i.e. City Council, School Board...Congress)?

Issues Influencing VAR

Association Characteristics—all dialogues, debates, and decisions are filtered through:

- Organizational Culture: in flux; recovering from breaks in trust; needing consistent transparent governance across the state; and partnership in behaviors and communication moving forward.
- Organization Life Stage: 75th anniversary in 2020; statewide opportunities to revitalize and frame itself as “young at heart” through volunteer engagement; or maintain status quo rooted in the past.
- Organizational Resources: the past casualness in dealing with financial matters demands a new rigor for managing *inside-the-box* resources to create *outside-the-box* results; many opportunities are to extend resources by leveraging relationships with alliances; and possible new non-dues revenue generators are around the corner.
- Members’ Career and Life Stage: no current accurate analysis available; conducting a “records census” to quantify advocacy efforts in representing members’ statewide influence and impact.
- Profession, Business or Cause Being Served: Realtor® and home ownership

Ongoing Association Alignments—Wherever an organization is casual, it will become its causality

What is the future relevance of the mission?

Whom does VAR represent and serve?

How is the VAR organized and governed?

How does VAR deliver its programs/services/experiences?

What are the expectations and attitudes towards the association?

(See Appendix-Association Alignments)





RESEARCH FINDINGS

Vision Statement: Vermont Realtors® is the trusted voice for the real estate industry and an effective public policy advocate for its members, their businesses and the consumers they serve.

The **Mission** of Vermont Realtors® is to serve its *members* by *providing resources* that *help* them *deliver* real estate *services* in an ethical and professional manner; and to *advocate* for the *rights of property owners* in Vermont.

Strategic Futures Sentences evolving from the April 12th statewide meeting of leaders and staff
VAR is Built on a Foundation of Partnership with its Local Boards and Members
VAR members are highly engaged and involved throughout all levels of the association

Survey Monkey Insights—analysis includes Futures Task Force members and VAR staff input:
Few surprises in member responses with most issues, concerns, and requests having been previously expressed by members, Local Boards and state leaders. Now it’s time to officially address and resolve them. Some of these items would require budgetary consideration, if implemented.

Members want support (communication, education, etc.) with practical, functional applications, such as how to set up an office, how to help new agents succeed, how to navigate the licensing process (including renewals), and with everyday professional processes.

Members want communications to include economic analysis and insights into state and local regulatory requirements regarding real estate

Members want consumers to have a better understanding of the value for using a Realtor®

Members conduct their businesses differently throughout VT, local boards allow for flexibility

Members want Code of Ethics valued, protected, and enforced to ensure consistent professionalism

Members support the concept of beneficial alliances and are advantageous

Members want the partnership with the Real Estate Commission improved

Members question current value NAR and VAR’s “institutional” Realtor awards programs

Members question the full value of advocacy

Members want ethics promoted and enforced in a timely and consistent manner

Members question necessity for current number of local boards, believe fewer would be better

Members want collaboration amongst VAR and Local Boards, want to consolidate and have fewer

Members question the governance structure, leadership terms, having new blood on the VAR Board

Members want VAR Board to meet quarterly in different locations around state for members to attend



Recommendations for Enhancing and Improving *Member Value* Going Forward

Every communication needs to be sent with a purpose, know target audience, understand how each message and delivery of information must be actual knowledge connected to overarching bigger theme.

- *FastFacts* re-design is warranted to align with strategic recommendations of VAR/LB partnership and member engagement. Could include rotating columns representing “alliance members” content. Highlights of each member of Presidents Council could expand experience of relatedness.
- Extend digital communications and messaging on VAR website and embedded in Facebook to include additional practical content supporting VAR members success (i.e. setting up an office— simple steps for new agents, etc.).
- Track trends occurring and report on their possible consequences, addressing concerns with key content embedded in all communications. Include a national, state, and local trends dashboard.
- During licensing renewal period, provide guidance members need by including key content throughout all of VAR communications. Everything VAR does has a communications component.
- Provide regulatory information (local and state) in newsletters.

Recommendations for Promoting the *Value of Advocacy* Going Forward

- As advocacy is at the core of what VAR does (even when experienced passively), it is critical the outcomes of VAR’s efforts are messaged in ways beyond their current approach to better frame VAR’s role in monitoring, influencing and advocating on behalf of our members.
- Advocacy’s importance needs to be reframed to include not only where VAR has been successful to protect member and property owners’ rights but also where efforts go under the radar that do not necessarily fit neatly into to a “Win/Lose” list of property rights. Example: VAR has lobbied for or against industry challenges from licensing of home inspectors, codifying REALTORS as independent contractors under the law, sign regulations, and many more. Hence the need for Alliances.
- The current form of communications highlighting the status of bills is insufficient. VAR needs to find ways to concisely inform members of the direct impact of issues on them, their businesses and their buyer and seller clients.
- Encourage members to share with their clients and customers some of the legislative and regulatory issues VAR fights on their behalf, allows constituents to better understand the value of Realtor® and the role they play in protecting homeownership.
- After completion of the *Designated Realtor* letter send to each brokerage, conduct *Membership Census* recording for the first time a state-wide cumulative profile of critical professional, geographical, and economic data to best showcase VAR’s membership to state legislators and regulators. What one measures matters—now is the time to reveal the full measure, impact, and influence of VT Realtors®.
- Work with brokerages to focus on best practices to frame this critical content for their use.
- Create talking points and other content for local board meetings is important but not enough.
- VAR staff and selected volunteer leaders could record a monthly low-tech smartphone video message about issues, the work VAR is doing and why it should matter.
- Video can also be shown prior to every CE class VAR offers. As course attendees are a captive audience of members (who may or may not attend their local meetings), VAR would additionally promote the value of Realtor®.





Recommendations for Promoting the *Realtor*® Brand Going Forward

- Intentionally promote the ® value and address need for its promotion through all VAR communications vehicles with members. Example: monthly article for members to share in their client newsletters, on their blogs, or on their social media pages supporting members build their brand across all the resources they already use.
- Add a category page on VAR website to house articles and ideas for promoting the Realtor brand. Example: web banners, signatures and other resources available at no cost from NAR. and explain how to use these resources.
- Encourage (and reward) agencies in Vermont to have the Realtor logo on their sites, including content about the importance of using a Realtor® Example: *Broker/Agent Engagement Award*

Recommendations for Promoting the Value of *Better Governance* Going Forward

With 2020, VAR’s 75th anniversary year, now is the appropriate time to craft a more transparent organization through major upgrades in representation, service agreements, and responsibilities.

- Revise Policies & Procedures Manual to reflect adaptation of strategic planning recommendations and ongoing adjustments of actions taken to deliver the plan’s goals.
- Schedule periodic conversations for the realignment of resources to better maintain partnership and secure transparency thus pre-empting any possible break in understanding decisions made.
- After census results are confirmed, investigate “regional” approach to reorganization of LBs to best serve membership and re-arrange appropriate governance representation. Secure key stakeholder champions throughout state to influence transparent resolution to reorganization.
- Make public the basic leadership agreements, including a “no back-door re-voting” policy, plus a procedure to address broken agreements. Follow BoardSource.Org for *Code of Duty, Loyalty, and Obedience*. (See Glossary).
- Establish term limits for VAR board members—encourage then make room for new leaders
- Collaborative Decision Making: Green-thumbs for UP; Red-thumbs for DOWN to mean “not agree but won’t stand in way of group”; Yellow-thumbs SIDEWAYS is Abstain; and a Red flag to Block to mean “think really bad idea, need to have something addressed before move forward” Each shows respect for others point of view.
- Revise Executive Committee composition for President, Vice-President, Treasure, Past-President, and VAR CEO to be joined by new positions of Membership-Engagement Committee Chair, Advocacy Committee Chair, and Presidents’ Council Chair.

RECOMMENDATIONS for Partnership and Engagement

*VAR is Built on a Foundation of **Partnership** with its Local Boards and Members
VAR members are highly **engaged** and involved throughout all levels of the association*



EXAMPLE: Leveraging existing resources to create outside-of-the-box-results

RESOURCES	TRANSPARANT PARTNERSHIPS	ENGAGEMENT= OWNERSHIP OF RESULTS	SMRS & TIMEFRAME
Communications	Monthly President’s Video Blog Membership Census Emerging Professionals Profiles	Highlight selected NAR branded communications directly linked to VAR web—make assess easy (House Logic) Member testimonial to show diversity of membership scope <i>FastFacts</i> : rotate monthly for mortgage bankers, sale prep home repairers, appraisers, etc.	TBD—after VAR Board approval of concept, VAR staff along with specific volunteer leaders will specify results to be measured, in what timeframe, and determine what additional resources may be necessary beyond existing ones.
Events	Local Presidents Orientation and quarterly Council meetings VAR Open House and “Engagement Fair” hosted by Board & staff—sign up to volunteer on new committees. Co-brand with and extend NVBR’s existing <i>Evelyn Biddle Leadership Development Program</i>	<i>LBs Listening Forums</i> —members deserve to experience being listened to and have “dialogues” with their elected leaders Public Listening Forums—to learn newly what public realizes Realtor® value, concerns, issues State-wide Community Service Day	TBD—after VAR Board approval of concept, VAR staff along with specific volunteer leaders will specify results to be measured, in what timeframe, and determine what additional resources may be necessary beyond existing ones
Programs	RPAC—increase voter participation, broker involvement, funds raised, Advocacy Impact/Influence Branding Initiative standing for and by the Realtors® brand	Green Designation Realtor® State-wide Community Service Program Habitat for Humanity—build Parks & Recreation—create, clean up	TBD—after VAR Board approval of concept, VAR staff along with specific volunteer leaders will specify results to be measured, in what timeframe, and determine what additional resources may be necessary beyond existing ones
Relationships	2018: <i>One Size Not Fit All</i> Conduct Member Census* —every LB collects data Study diverse POV & stats 2019: 75th Anniversary Preparation Launch Realtor® brand	Create plan for younger agents who just passed licensure to engage VAR/LB—Be a catalyst for engagement President’s Council host Leadership Academy—includes graduates into LBs/VAR governance and educational presentations	TBD—after VAR Board approval of concept, VAR staff along with specific volunteer leaders will specify results to be measured, in what timeframe, and determine what additional resources may be necessary beyond existing ones

Broker/Agent Engagement Award —85% +

Sample Criteria for Using Communication—Events—Programs—Relationship Opportunities of Membership

Membership Attend Local and VAR Meetings Attend Annual Meeting Legislative Reception/PAC Engage in Community Efforts

PR—® logo use on website and in ads Volunteer for Boards, Committees, Task Force Co-Brand Education with VAR

We go beyond selling homes and property—list organizations and non-profits brokerage works with to strengthen the community

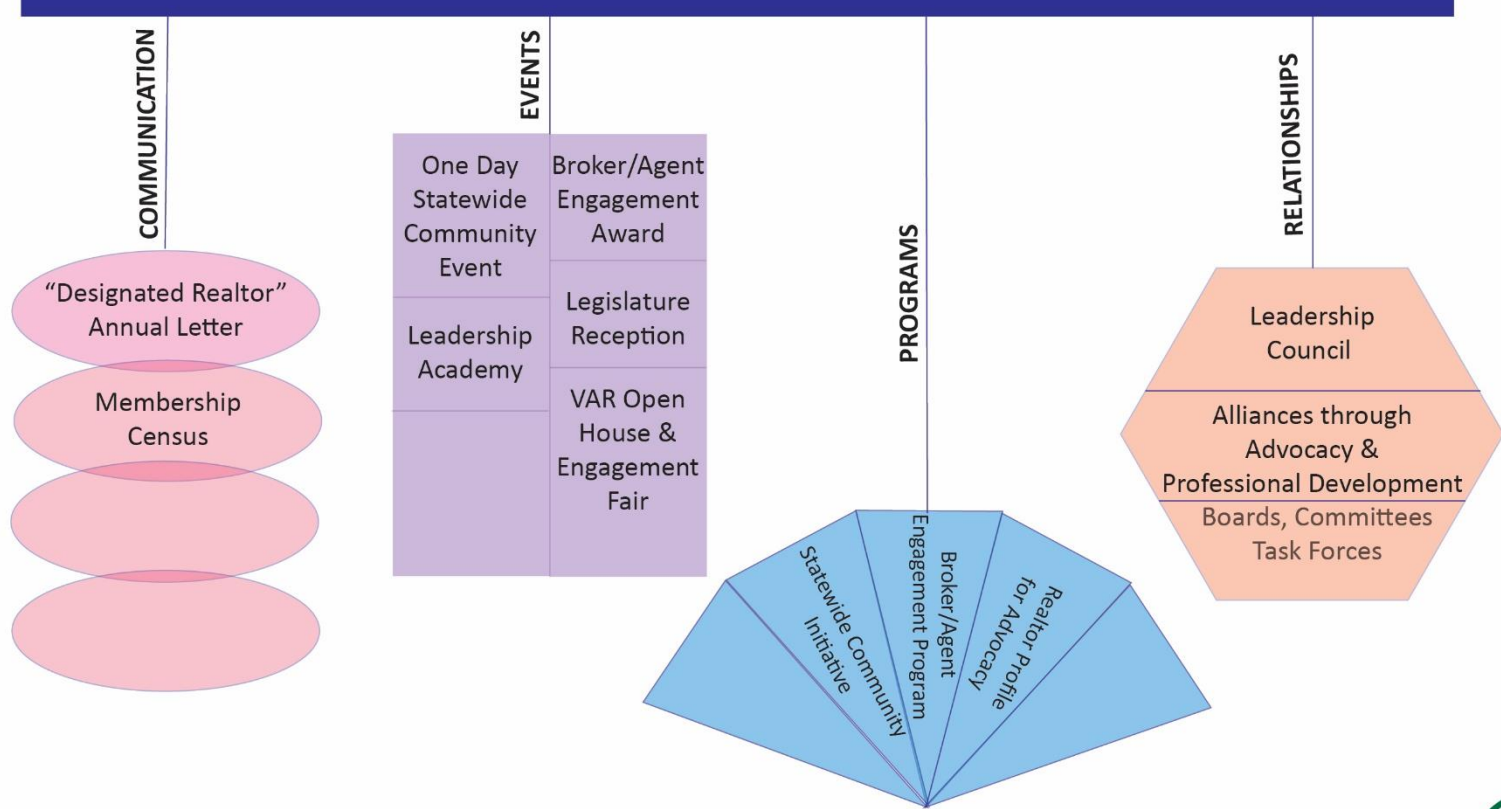


VAR Leveraging Resources & Outcomes

VAR is built on a Foundation of Partnership with its Local Boards & Members

Eventually Everything Connects

VAR members are highly engaged and involved throughout all levels of the association





Use these membership *processes* and *resources* to chart success, harmony, and vitality within your organization's *eco-system*.

Membership Processes

These six distinctions are inter-related, simultaneous and critical to the success of any association and the ongoing transference of its *Vision, Mission, and Value Proposition*.

Referrals—A timely process to follow up with referrals, create continuous invitations to provide a steady infusion of new members for their ideas, financial support, and future leadership. *What are VAR's key messages to current members requesting they refer others in their network?*

Enrollment— The ongoing process of enrolling peers into the relevance and value of VAR. Highlight all the built-in daily opportunities for enrolling members and encourage their urgent action. *What is different in VAR's messaging for enrollment and referrals?*

Welcome— A program that informs, inspires and mentors new and renewing members into ongoing VAR's engagement and belonging opportunities— the key to successful membership on-going involvement. A partnership between the new member and VAR is created that includes a "call for action" to participate in their own growth and development. The whole idea is to create the "experience of life-long membership" *In addition to new members, how will current and past members be newly welcomed? What is VAR's quality control procedure to ensure an excellent 1st-year members experience?*

Engagement—Membership is a series of offers and opportunities for engagement providing lasting feelings of benefit, belonging and value. The goal—memorable membership experiences. *How does VAR define and encourage participation to ensure VAR is meeting "a personal touch?"*

Leadership—Volunteer and staff leaders must be vocal and visible in all areas of the membership process. Everything that is said and done by volunteer leaders and staff, planned and budgeted, suggested and recommended must advance VAR's value. *What will be VAR Board's role in membership? How will member-value best practices be shared across the state to benefit all members?*

Renewal—This process is highly administrative and requires ALL staff be responsible for its success. It tracks a yearlong experience of value resulting in a member's ongoing engagement. *What memorable experiences are key to the success of this process? How are members tracked to forecast renewal?*

Fused Resources

Intentionally connecting resources delivers ongoing *memorable experiences* (feelings, encounters, and knowledge)—making your organization *indispensable*.

Events—Utilize existing association events to best positioning whether the audience is current members, non-members, staff, the public, media or regulators. "One-time only" knowledge events are a misuse of staff and resources—harvesting each events knowledge for use in other areas is critical.

Communications—There must be an inter-dependent communication program (print, web, mobile, and live) to remind current members and showcase to potential members the distinct value of your organization. Every day in every way members, customers, the public and the over-all community must be aware of your relevance.

Relationships—Associations provide opportunities that engage and encourage people to create professional and personal experiences and life-long relationships. Members, staff, media, the public - all contribute to those relationship experiences. The more memorable the relationship, the closer your organization comes to the fulfillment of its mission.

Programs—All internal or external opportunities where the association interfaces with the members, the public, related associations, legislators, the media and regulators and all non-members must represent value, efficiency, and responsiveness.

Experiences—They are best described as multi-sensory and immersive, memorable moments that extend over time. It's the intentional fusing of events, communications, programs and relationships and the knowledge harvested from them.



Communication:

- Invest in text messaging technology and basic recording equipment to produce video blogging
- Review all state and local literature for necessary message upgrades and value alignments
- Do monthly podcast as a low-tech method of communication inviting members to stay connected and listen within members' schedules and availability. VAR can produce these in conjunction with every LBs newsletter allowing members the option of listening rather than reading. A transcript of every podcast (along with a link to the podcast) could be on our website.
- Building alliances are critical to any business would also leverage VAR's communications efforts. Local alliances can provide more relevant local board content. Sharing valuable content from VAR's alliances with members will strengthen everyone involved thus keeping members engage in and building additional relationships in their communities.

Events & Programs

- Convene *Listening Forums* to learn the public's view on Realtor® value, concerns, VAR issues
- Have Open House and "*Engagement Fair*" hosted by Board and staff as an opportunity to sign up to volunteers onto new committees
- Deliver professional development topics that impact both agents, brokers, buying public: impact new tax codes; mortgage bankers roundtable w/VT Land Trust; changes to realtor contracts and addendums; social media "dos & don'ts"
- Have *Broker/Agent Engagement Initiative* part of the Advocacy and Membership Committees efforts to increase involvement in voter participation; participation in statewide community service projects; having emerging professionals part of the Leadership Academy, and much more engagement "touch points".
- Have initiative for VAR and LBs to inventory and analyze their existing alliance networks to measure their value and connections to better extend their combined resources; their ability to impact and influence what matters to members; and to best represent Realtor®.

VAR is Built on a *Foundation of Partnership* with its Local Boards and Members

- Be transparent with VAR Board/staff attending LBs meetings to convey strategic updates
- Have VAR staff's guiding principles for member relations be: *Integrity, Transparency, Collaboration*
- Newly define and realign VAR/LBs two-way collaboration and communication
- Across VT, one size doesn't fit all—diversity of member needs must be accounted for
- Have at least one VAR Board meeting annually accessible to all members
- Convene "regional" town meetings 2X year hosted by VAR Board
- Create opportunities where it's easy for anyone to participate in decisions that affect them.
- Break down the existing barriers to state-level participation in decision-making and engagement
- Model the cooperative structure of membership VAR says it values encourage collective ownership
- Be an open-source culture making a collaboration of content and ideas accessible to everyone
- Be adaptive, reflexive, user-driven developing tools which are driven by members' collective wisdom





VAR members are Highly Engaged and Involved throughout all Levels of the Association

Engagement: Invitation for members to engage are rooted in a culture where members feel ownership for the organization and now have the expanded opportunity to shape the organization (state and local levels).

The more opportunities for the meaningful contribution of one's expertise, time, and other resources—the more members will engage. Examples of Possible Committees: Executive, Finance, Nominating, RPAC, Membership, Young Professionals, Forms, Professional Conduct/Grievance Process (Ombudsmen Training), Events, Business Issues/Research Professional Development/Education, Advocacy (legislative & regulatory), Communications, Public Relations/Community Outreach, and Strategic Plan Implementation & Monitoring

Alliances: strengthen existing alliances and create new ones to benefit home ownership (property) and strengthen communications with all stakeholders. LBs to also analyze their existing alliances for a possible upgrade for regional and state advantage.

Examples explored by Futures Task Force: Chamber of Commerce, Rotary, Economic Development, Habitat for Humanity, Housing Trust, Building Assoc., Mortgage Bankers, Appraisers, and Commercial Realtors.

Code of Ethics: More marketing and education on the what is needed to for better inform members of the different levels a COE complaint could take—ombudsman, citation, mediation, and arbitration. Push for resolving of disputes for ethics enforcement in a timely way and then share mistakes made—lessons learned across the state.

Large Brokers: Encourage them to be more directly involved AND actively encourage their staff throughout the year. A goal of 85% engagement form the broker membership to have 85% of their agents engaged is a worthwhile game to play. VAR and LBs can partner with them to outline career path for Emerging Professionals to be involved. Convene large broker focus group quarterly to keep the knowledge flowing for what's happening. Mini-TED sessions by Emerging Professionals "sponsored" by large brokers at LBs meeting is an avenue to explore.



CONCLUSION

Over the past 15 months, VAR has accomplished much. Now it must approach the new oncoming road signs more aware and alert in order to continue traveling successfully into its future. The signs say:

- Use everything you have done in the past—realizing mistakes previously made and lessons learned.
- Be clear “what” you know and what you do not know.
- Question what you think you know and “why” you believe you know that.
- Establish a sense of urgency to restore trust and maintain transparency of association ownership.
- Tell and re-tell the story of the strategic plan by regularly communicating its strategic intention, promote ongoing progress, and reveal mistakes made/lessons-learned.

During the remainder of 2018 and into 2019, VAR Board and staff must get to know its members as never before. Conducting a Member Census is the beginning of knowing who VAR and its LBs actually represent. Attending LBs meeting to experience real-time contact with the member is an obvious “to-do”. As importantly, VAR staff visiting with the large brokerages who have multiple memberships throughout the state could also happen monthly. By mid-2019, VAR should have sufficiently experienced its membership in action while experimenting with multiple communication, programming, event, and relationship models of varying content to best plan and launch its 75th Anniversary in 2020. Make it a great celebration showing the flexibility and adaptability of VAR going into the future.

“If you’re a leader, think about the impact of your decisions on seven generations into the future.”
 — Chief Wilma Mankiller, Cherokee

Final Recommendation—Practice **FORESIGHT**

Devote time at each Board meeting (VAR or LB) to thinking about the long-term future of the organization and what actions today will impact and influence many tomorrows to come. Look to societal changes, economic alterations, and technology advances—each able to expand or contract the role and necessity for the Realtor[®]. Human nature being what it is, the impulse for self-preservation can unknowingly encourage maintaining the status quo. To best maximize the value and opportunity a strategic plan offers, consider it an ongoing evolving process rather than hold it as a dated report. The continual practice of *foresight exploration* and *leadership dialogues* are demanded. What will VAR affirm about its past, be consistent in its present actions, and deliver on its future promises to best showcase itself as vibrant for its 75th anniversary in 2020 and beyond?

“There may be no single thing more important in our efforts to achieve meaningful work and fulfilling relationships than to learn and practice the art of communication.” —Max De Pree

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