



# 2015 Strategic Action Plan

**KEY RESULT AREA:  
Chapter Support/Education**

# KEY RESULT AREA: Chapter Support/Education Objective 1

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead	Support	Status Updates
<p><b>Issue:</b> <b><i>Chapters Orientation &amp; Training</i></b></p> <p><u>Objective 1:</u> Local Chapters conduct orientations</p>	<ul style="list-style-type: none"> <li>• Create materials and templates for local chapter orientation.</li> <li>• DVP's and Governors will visit local Chapters and conduct a local Chapter orientation if needed</li> <li>• Survey and debrief Chapters, GOVs and DVPs after training sessions to provide 360 feedback.</li> </ul>	CATT	EXEC	
		EXEC	DVPs and GOVs	
		GOVs, DVPs	EXEC COMM	

# KEY RESULT AREA: Chapter Support/Education Objective 2

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Chapters Orientation &amp; Training</b></p> <p><u>Objective 2:</u> Conduct comprehensive training targeted to each leadership position</p>	<ul style="list-style-type: none"> <li>• Survey attendees after state orientation &amp; each state meeting to formalize results for future training and development</li> <li>• Train Governors and DVP's as members of the CATT team and have them provide field training and support to Local Chapters</li> <li>• Develop 2016 State Orientation based on 2015 member survey and directives from WCR National</li> <li>• Develop task force for Statewide CPA services to create compliance and consistency among chapters in all financial matters. (Start in 2014; Complete 2015, implement 2016)</li> </ul>	EXEC	Education COMM	
		CATT	EXEC	
		State PE		
		EXEC	GOV, DVP	

# KEY RESULT AREA: Chapter Support/Education Objective 2 (Continued)

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead      Support		Status Updates
<p><b>Issue:</b> <b><i>Chapters Orientation &amp; Training</i></b></p> <p><u>Objective 2:</u> Conduct comprehensive training targeted to each leadership position</p>	<ul style="list-style-type: none"> <li>•Provide parliamentary procedure, training to LCP's , GOVs and DVPs and local chapter parliamentarians via Video or Skype by a Licensed Parliamentarian.</li> <li>•Create a task force to do needs analysis and make recommendations for specific local officer training.</li> <li>•Maintain technology training and programs at all levels to stay current in technology trends such as effective use of video, blogging, Twitter, social media, Evernote, etc.</li> </ul>	<p>Parliamentarian</p> <p>EXEC</p> <p>EXEC</p> <p>Technology</p>	<p>GOVs, DVPs CATT</p> <p>CATT Specialty, COMM</p>	

# KEY RESULT AREA: Chapter Support/Education Objective 3

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead      Support		Status Updates
<p><b><i>Issue:</i></b> <b><i>Field Support</i></b></p> <p><u>Objective 3:</u> Evaluate CATT Program</p>	<ul style="list-style-type: none"> <li>• Survey attendees after CATT training and restructure training provided by CATT as needed</li> </ul>	EXEC	COMM	

# KEY RESULT AREA: Chapter Support/Education Objective 4

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Field Support</b></p> <p><u>Objective 4:</u> Expand CATT to provide field support through a traveling CATT team</p>	<ul style="list-style-type: none"> <li>• Identify additional CATT members with ability to travel and provide field support</li> <li>• Train additional CATT members to provide comprehensive training to help resolve specific issues for Local Chapters</li> </ul>	CATT	EXEC	
		CATT	EXEC	

# KEY RESULT AREA: Chapter Support/Education Objective 5

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead Support		Status Updates
<p><b>Issue:</b> <b>Member Tools and Resources</b></p> <p><u>Objective 5:</u> Develop an extensive library of tools and resources on various topics and in appropriate formats (video, webinar, FAQs, job aids, etc)</p>	<ul style="list-style-type: none"> <li>• Identify all tools and resources currently available through the State Chapter and post to the state website</li> <li>• Collect/review/publish “Best Practices for New Member Orientation”</li> <li>• Create links from the state website to tools available on the National website, or post tools to the state website if link is not available</li> <li>• Communicate the availability of tools to Chapter leaders at all levels</li> <li>• Utilize You Tube for “How to” videos on tools and resources necessary to conduct chapter business.</li> <li>• Evaluate utilizing <a href="http://www.Box.com">www.Box.com</a> in conjunction with the state website</li> </ul>	Education/ Technology	EXEC	
		Education Technology	EXEC	
		Education/ Technology	EXEC	
		COMM. DVPs & GOVs	EXEC & Education	
		Education/ Technology	EXEC	
		Technology	EXEC	



# KEY RESULT AREA: Chapter Support/Education Objective 6

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead      Support		Status Updates
<p><b><i>Issue:</i></b> <b><i>Member Tools and Resources</i></b></p> <p><u>Objective: 6:</u> Develop International Committee for Texas Chapter</p>	<ul style="list-style-type: none"> <li>•Create International Committee</li> <li>•Develop partnership with TAR International, NAR Global Committee and Mexico AMPI Association</li> <li>•Encourage involvement with other International Events and Education.</li> <li>•Partner with TAR for CIPS/TRC Course</li> </ul> <p><i>Develop BRM covering International Real Estate Topics</i></p> <p><i>Create hyperlink to TAR International Committee and NAR Global Committee on State website.</i></p>	<p>Executive International Committee</p> <p>International Committee</p> <p>International Committee</p>	<p>Education Executive</p> <p>Executive</p> <p>Executive</p>	

# KEY RESULT AREA: Chapter Support/Education Objective 6 (Continued)

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead      Support		Status Updates
<p><b><i>Issue:</i></b> <b><i>Member Tools and Resources</i></b></p> <p><b><u>Objective: 6:</u></b> Develop International Committee for Texas Chapter</p>	<p><i>Border town/sister city Property Tour</i> <i>Information about International Financing/Closing Process</i> <i>International Mixer at State Meeting with partnership from TAR</i> <i>International Committee and or AMPI Association.</i></p>			

# KEY RESULT AREA: Chapter Support/Education Objective 7

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead	Support	Status Updates
<p><b>Issue:</b> <b>Chapter Tools and Resources</b></p> <p>Objective 7: Develop an extensive library of tools, resources, facilitators to train for Strategic Planning</p>	<ul style="list-style-type: none"> <li>• Survey Local Chapters to determine who is currently conducting annual Strategic Planning Committee meetings and/or local chapter orientations.</li> <li>• Use survey information from Local Chapters and input from the State Chapter Strat Plan process to develop tools and resources for use at the local level</li> <li>• Identify a team of Strat Plan facilitators made up of WCR members using specific criteria for selection</li> </ul>	<p>Executive</p> <p>EXEC</p> <p>EXEC</p>	<p>Technology</p> <p>Strat Plan/ task force</p> <p>CATT, National focus &amp; Past Presidents</p>	

**KEY RESULT AREA:**  
**Leadership Development**

# KEY RESULT AREA: Leadership Development Objective 8

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Emerging Leader Identification Development and Showcase</b></p> <p><b>Objective 8:</b> Design and implement systems that educate members to be leading experts in the industry.</p>	<ul style="list-style-type: none"> <li>•Promote TRLP participation for local chapter leadership</li> <li>•Provide scholarship(s )for TRLP as one of the certifications for a Past President’s Scholarship Award.</li> <li>•Create a leadership data base that includes involvement in real estate related and community organizations.</li> <li>• Create a leadership mentoring support system</li> <li>•Conduct a joint meeting of National Focus, CATT and Nominating to discuss a joint initiative on leadership development-Feb 2015</li> </ul>	Education PP	Marketing PR Education	
		EXEC / Task Force	CATT, Nat’l Focus	
		EXEC	Nat’l Focus, CATT, Nom.	
		EXEC	Nat’l Focus CATT, NOM	

# KEY RESULT AREA: Leadership Development Objective 8 (Continued)

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead          Support		Status Updates
<p><b><i>Issue:</i></b> <b><i>Emerging Leader Identification Development and Showcase</i></b></p> <p><b><u>Objective 8:</u></b> Design and implement systems that educate members to be leading experts in the industry.</p>	<ul style="list-style-type: none"> <li>• Position Texas State Chapter toward becoming a leading resource in the industry; EDUCATION based on study into the next 5 years, keeping members updated on politics, people, leadership, technology, cultures, referral based business, local and business communities, economics, mentoring &amp; DISC.</li> </ul>	TDVP, GOVS	CATT Education COMM	

# KEY RESULT AREA: Leadership Development Objective 9

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>National Focus</b></p> <p><u>Objective 9:</u> Restructure National Focus</p>	<ul style="list-style-type: none"> <li>•Change standing rules to modify composition of National Focus committee</li> <li>•Redefine roles, function, and charges of National Focus, setting guidelines and establishing annual audit.</li> <li>•Proposed changes to Standing Rules presented at February 2014 Governing Board Meeting regarding National Focus Committee to be approved as proposed and restructure National Focus Committee to consist of 3 past state presidents, RVP (whenever RVP is from Texas) CATT Chair/representative, and four general members appointed as well as any member serving on the National Executive Committee.</li> </ul>	EXEC	Bylaws Comm	
		EXEC	Nat'l Focus	
		EXEC	Nat'l Focus	

# KEY RESULT AREA: Leadership Development Objective 10

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <i>WCR as a member's resource for pathways to leadership opportunities.</i></p> <p>Objective 10: Position WCR as a resource that explores, develops and facilitates each member's leadership qualities, goals and objectives</p>	<ul style="list-style-type: none"> <li>• Create a member leadership profile to be completed by attendees during 2015 Orientation</li> <li>• Create a task force to develop a leadership mentoring program</li> <li>• Develop a "pathway list" of valuable contacts for members use</li> </ul>	<p>PE</p> <p>EXEC/Task Force</p> <p>Nat'l Focus</p>	<p>Exec</p> <p>CATT Nat'l Focus DVP's &amp; GOVs, Past Presidents</p>	



**KEY RESULT AREA:  
Communication/  
Women's Council Brand**

# KEY RESULT AREA: Communication/Women's Council Brand Objective 11

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Statewide Marketing / Give a Face to WCR</b></p> <p><u>Objective 11:</u> Create effective marketing plan targeted to the real estate industry</p>	<ul style="list-style-type: none"> <li>• Provide National's key message templates to local Chapter presidents for delivery through a variety of communication delivery vehicles.</li> <li>• Publish Facebook and YouTube posts (2 min. general messages &amp; testimonials)</li> <li>• Explore benefits of co-branding with community partners</li> <li>• Utilize the tools that National has provided.</li> <li>• Provide a comprehensive plan to market to all past and current members to promote the benefits of WCR to include messages, media and timing.</li> </ul>	EXEC	GOV's/ DVP's	
		Technology	EXEC	
		Strategic Partner Committee	EXEC	
		Marketing	Technology	
		Marketing	Technology COMM	

# KEY RESULT AREA: Communication/Women's Council Brand Objective 12

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Communication Delivery Vehicles</b></p> <p><u>Objective 12 :</u> Expand methods and venues to deliver key messages</p>	<ul style="list-style-type: none"> <li>• Conduct a hands on, “how to” website workshop specifically addressing Chapter website customization. Each Chapter designates one or more members to go to class. Chapters with a website already done commit to send one or more members to help facilitate workshop training.</li> <li>•Broadcast messages to Chapter line officers (ie: registration opened today, book flights, register for mid-winter meeting, etc.)</li> <li>• Conduct a session on useful website tools (at 2015 Leadership Orientation)</li> <li>•Have local Chapters contribute to spotlight articles throughout the year</li> </ul>	EXEC	Technology Education	
		EXEC	COMM Committee	
		EXEC	Technology Committee	
		Technology COMM	State Coor Chapters	

# KEY RESULT AREA:

## Communication/Women's Council Brand

### Objective 12 (continued)

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Communication Delivery Vehicles</b></p> <p><b>Objective 12 :</b> Expand methods and venues to deliver key messages</p>	<ul style="list-style-type: none"> <li>• Make sure Chapters are aware of recently developed FAQ sheet "Did You Know"</li> </ul>	EXEC	State Coor	
	<ul style="list-style-type: none"> <li>• Have PR Committee develop and publish press releases and/or promotions, and continue to research other communication venues and/or resources</li> </ul>	PR	EXEC/GOV's & DVP's State Coor	
	<ul style="list-style-type: none"> <li>• Make bi-monthly posts to State Chapter YouTube channel</li> </ul>	EXEC	Technology & COMM	

# KEY RESULT AREA: Communication/Women's Council Brand Objective 13

Plan Issues/Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Local and Business Community Involvement</b></p> <p><u>Objective 13:</u> Enhance current professional image of the State Chapter on the website and in social media on a consistent basis</p>	<ul style="list-style-type: none"> <li>• Develop social media guidelines for the Technology Committee regarding frequency and content of posts with a focus on consistency and coordinated for effectiveness.</li> <li>• Offer a business etiquette class on social media and blogging</li> </ul>	EXEC	Nat'l WCR	
		Education	Technology	

# KEY RESULT AREA: Communication/Women's Council Brand Objective 14

Plan Issues/Objectives	2015 Deliverables	Assignment Lead Support		Status Updates
<p><b>Issue:</b> <b>Local and Business Community Involvement</b></p> <p><u>Objective 14</u> More involvement of local chapters resulting in community awareness of WCR.</p>	<ul style="list-style-type: none"> <li>•Encourage involvement, joint meeting and education with Chamber, school systems, EDC, etc. Utilize local members in area chapters that are currently involved to mentor the other chapters in area.</li> </ul>	TDVPs GOVs State Coor	CATT PR	

**KEY RESULT AREA:  
Liaison to Industry**

# KEY RESULT AREA: Liaison to Industry Objective 15

Plan Issues/Objectives	2015 Deliverables	Assignment Lead      Support		Status Updates
<p><b>Issue:</b> <b>Member Involvement</b></p> <p><u>Objective 15:</u> Identify, educate and encourage involvement by members as leaders and participants in TAR and NAR Committees, Institutes Societies, Councils and events</p>	<ul style="list-style-type: none"> <li>• Update the Texas Pathways to Leadership brochure and create a companion video with a focus on the individual member</li> <li>• Package Pathways to Leadership brochure and video for use as a Business Resource Meeting program for Local Chapters</li> <li>• Remind members of the deadlines for volunteering to serve on TAR and NAR committees and the importance of getting recommendations from past leaders who have been involved at these levels.</li> </ul>	<p>Marketing ED</p> <p>Marketing Technology</p> <p>EXEC</p>	<p>EXEC PP's, NF Tech</p> <p>CATT</p> <p>COMM</p>	



# KEY RESULT AREA: Liaison to Industry

## Objective 15 (continued)

Plan Issues/Objectives	2015 Deliverables	Assignment Lead                  Support		Status Updates
<p><b>Issue:</b> <b>Member Involvement</b></p> <p><u>Objective 15:</u> Identify, educate and encourage involvement by members as leaders and participants in TAR and NAR Committees, Institutes Societies, Councils and events</p>	<ul style="list-style-type: none"> <li>Utilize technology to build both State and Local Chapter libraries of testimonials from industry leaders</li> </ul>	EXEC	Technology & COMM	

**KEY RESULT AREA:  
Governance and Operations**

# KEY RESULT AREA: Governance and Operations Objective 16

Plan Issues/Objectives	2015 Deliverables	Assignment Lead                  Support		Status Updates
<p><b>Issue:</b> <b>Chapters Supporting Chapters</b></p> <p><u>Objective 16:</u> Facilitate communication between local chapters</p>	<ul style="list-style-type: none"> <li>•Facilitate open communication between area chapters to support and mentor each other through virtual and physical local district meetings, roundtables at state meetings, newsletters and box.com</li> </ul>	DVP's Gov	Education, COMM, State Coor	

# KEY RESULT AREA: Governance and Operations Objective 17

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Support System and Contingency Plan for Officers</b></p> <p><u>Objective 17:</u> Create a contingency plan for vacant officer positions</p>	<ul style="list-style-type: none"> <li>• Create a contingency plan for back-up candidates to fill temporary or permanently vacated positions</li> </ul>	Nominating	EXEC & CATT	

# KEY RESULT AREA: Governance and Operations Objective 18

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Support Systems for Local Chapters</b></p> <p><u>Objective 18:</u> Improve the support system available to Local Chapters</p>	<ul style="list-style-type: none"> <li>Expand CATT team and include logistical support of ONSITE Chapter assistance</li> <li>Define a subject matter expert pool that can provide support to Local Chapters on specific issues</li> </ul>	<p>CATT</p> <p>CATT</p>	<p>EXEC</p> <p>Past Presidents</p>	

# KEY RESULT AREA: Governance and Operations Objective 19

Plan Issues/ Objectives	2015 Deliverables	Assignment Lead                  Support		Status Updates
<p><i>Issue:</i> <b>Operating Efficiency</b></p> <p><u>Objective 19:</u> Improve operating efficiency</p>	<ul style="list-style-type: none"> <li>• Survey DVPs and Governors on a regular basis for their understanding of job duties, satisfaction and suggested improvements for operating efficiency</li> <li>• Survey local officers regularly on the effectiveness of state officer support</li>   <li>• Provide Parliamentary procedure training to Local Chapter Parliamentarians, LCPS, Governors and DVPs via video or SKYPE by a Licensed Parliamentarian.</li> </ul>	EXEC	Special Committees	
		EXEC	Special Committees	
		State Parliamentarian	EXEC	

# KEY RESULT AREA: Governance and Operations Objective 19 (Continued)

Plan Issues/ Objectives	2015 Deliverables	Assignment		Status Updates
		Lead	Support	
<p><b>Issue:</b> <b>Operating Efficiency</b></p> <p><u>Objective 19:</u> Improve operating efficiency</p>	<p>•Proposed changes to Standing Rules presented at February, 2014 Governing Board Meeting regarding National Focus Committee to be approved as proposed and restructure National Focus Committee to consist of 3 past state presidents, RVP whenever RVP is from Texas, CATT Chair/representative, and four general members appointed as well as any member serving on the National Executive Committee.</p>	EXEC	National Focus	