

KENTUCKY ASSOCIATION OF REALTORS 2009 MANAGEMENT PLAN

ADMINISTRATIVE	TACTICS	ASSIGNMENT	TIMELINE	STATUS
NI -Develop a Process & Procedures Manual (2008)	Documentation of major task processes	Executive Assistant All Staff	Begin in January and continue through 2008	Not started
NI -Review and Revise Bylaws & Policies & Procedures Manual as necessary	Implement changes, if any, required by Structural Audit; amend policy manual following Directors meetings; monitor policies needed for revision	Executive Assistant	On-going	Continual process in 2007; anticipate to occur in 2008
NI -Revise Personnel Manual, rewrite job descriptions	Review and rewrite where necessary	EVP , with legal counsel review of manual	Complete by September 2008	Not started
CP -Leadership Development	Continue to identify, recruit and develop new leaders; ensure continuance of Leadership Programs (LeadershipKAR, Leadership Training, etc.)	Current KAR Leadership Past Presidents LeadershipKAR EVP , Professional Development Director	On-going	Continuous
CP -Staff Development	Continue to provide training and education for staff for better member services	EVP	On-going	Continuous
CP -Legal Representation/Legal Information/Defense (if needed)	Ensure legal counsel involvement with Association; continue learning process; provide verbal and written legal updates; ensure up-to-date policies for legal compliance	EVP Legal Counsel	On-going	Continuous
CP -Strategic Planning; Business Planning	Ensure review and compliance with Strategic and Business plans	Strategic Plan Committee EVP	On-going	Continuous
NISP -Clean Existing Database, identify available fields to add to member information; research customer tracking systems; stay abreast of NAR/other assns. gathering member information & developing database systems	Continue to clean up member records; add additional information where possible; find ways to track member purchases/services used; converse with NAR & other assns. who are currently working on developing new systems; work with current vendor to track new upgrades	Finance Director EVP	1-Database as clean as possible and 2- tracking of services purchased done 12/08; 3-research on tracking products done by 06/08	1-Continuous; 2-June 2008; 3-December 2008
NI -Improve committee meeting management, internal meeting management & communications	Develop committee meeting notification process; develop internal on-line calendar	Executive Assistant All staff	Implemented 02/08	Continuous; Calendar not started

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OPERATIONS	TACTICS	ASSIGNMENT	TIMELINE	STATUS
CP -Maintain current & increase non-dues revenue streams	Manage existing non-dues revenue programs; monitor success (\$ & Growth); explore and evaluate other potential non-dues revenue sources (Affinity programs; website & publication advertising, etc.)	Finance Director Communication/Marketing Director Professional Development Director	On-going on current; present proposals on new initiatives in February & June 2009; budgeted in 2010	Current initiatives projected to break even by 06/08, profit by 12/08 and beyond; break even by 12/09 on new, profit 12/10
NI -Develop New Initiatives funding source	Estimate cost of initiatives, R&D cost; set aside reserve account for adequate funding; work toward long-term plan for continued funding for new initiatives	Finance Committee Finance Director EVP	February & June 2008 for 2009 Budget	Not started
NI -Examine current investments including retirement plan; create policies for reserve accts	Investment task force look at current investments, make recommendations for changes, if any; create reserve policies	Investment Task Force Finance Committee Finance Director	Investment Task Force recommendations implemented in 1Q08; policies to Finance Committee 02/08	Not started
CP -Provide timely financial report; expand current reporting	Develop meaningful reports on cash flow, fixed asset documentation, projections, analyze administrative costs per program	Finance Director Finance Committee	Financial reports done by end of following month; new reports to Finance Comm. 12/08	Current report on-going; new reports not started
NI -Analyze current office equipment and new technologies available; upgrade as necessary	Assess current equipment and current and future needs of hardware, software and new technologies for streamlined meetings, communication, administration and services; budget appropriately	Finance Director Finance Committee	Completed by 06/08 for 2009 budget	New equipment budgeted annually; new technologies not implemented to potential
CP -Maintain and improve office facility; assess costs v. value	Correct current building issues; improve interior office; improve facade	Building Committee Finance Committee Finance Director	Existing building issues completed by 02/08; interior plans made & budgeted for 2009	Current issues partially completed; new plans not started
NI -Develop emergency plans & procedures, contingency plans (financial) & ensure secure data	Create emergency plans (natural disaster, economic, etc), including communication plans; check insurance coverage; ensure member & other information security	EVP Finance Director	Completed by 12/08	Not started

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MEMBER SERVICES	TACTICS	ASSIGNMENT	TIMELINE	STATUS
NI -Develop/deliver meaningful services to broker-owners	Host Broker Summit for education & idea sharing; provide information on management tips/trends; develop on-line resources; offer broker-specific education	Professional Development Director Communications/Marketing Director	1-Summit – 04/08 2-Tip/Trends; on-line resources 3-Broker-specific ed	1-Planned 2-08/08 3-07/08
CP -Review existing forms; explore potential of on-line; analyze current usage	Continue to review and revise forms; track purchases and “hits” on-line	Communication/Marketing Director Legal Counsel	Analysis completed by 12/08	Forms available on-line (not auto fill); analysis not started
CP -Promote Business Meetings/Convention, boost participation	Encourage on-line registration with discounts; host multi-dimensional events & education at Business meetings/Convention; promote early & often; organize meetings well; send information early	Communication/Marketing Director Executive Assistant Professional Development Director	On-going	Continuous
CP -Local Association & Office Visits	Plan regular visits to local associations and to firm offices to promote KAR products & services; provide industry information to members	EVP KAR Leadership Executive Assistant CMD, PDD, GAD, PSD	Started in 2007; increase visits in 2008	Continuous
CP -Increase diversity programs, services & education	Develop programs and services to inform members on diversity issues; utilize NAR & community/state resources available & promote to members & local associations	Professional Development Director Communication/Marketing Director	On-going	Continuous
NI -Provide information & analysis on technological products	Inquire of members about technology products; write reviews; provide analysis of products	Communication/Marketing Director		
NI -Conduct a Member Survey to learn member wants/needs	Hire company to conduct survey; analyze results; determine current level of member usage of existing services	EVP Strategic Planning Committee	Budget survey in 2008; begin implementation in 2009 and beyond	Not Started
NI -Create and deliver information to members and firms on Disaster Preparedness	Gather and provide resources and other useful information for members’ use in case of a disaster	EVP Executive Assistant Legal Counsel	Complete by 12/08	Not Started

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LOCAL ASSOCIATION SERVICES	TACTICS	ASSIGNMENT	TIMELINE	STATUS
CP -Ensure compliance with Code of Ethics; facilitate mediation & arbitration	Provide administrative services, training, education on Code of Ethics, arbitration, mediation, & Professional Standards	Professional Standards Director	On-going	Continuous
CP -Expand local jurisdictions to cover KY counties w/o REALTOR association	Assist Local Associations with Jurisdictional issues	EVP Executive Assistant	On-going	Continuous
NI -AE Professional Development	Add AE page to website; Inform new and current AEs about KAR services	EVP	Begin 01-08	Continuous
CP -Provide Leadership Development opportunities for local association officers	Host leadership programs, training & information; host spokesperson training	Professional Development Director EVP	On-going	Continuous
NI -New Member Orientation information, brochures, CDs, etc	Develop & deliver to local associations information on KAR services to be provided at new member orientation	Communication/Marketing Director	Developed in 2008; delivered by 09/08	Not started
CP -Deliver Pre-licensing classes through local associations	Coordinate pre-licenses courses to be provided cooperatively w/ local associations	Professional Development Director Communications/Marketing Director	On-going	Continuous
CP -Provide financial assistance and other support for new local governmental affairs programs	Continue LAGASP (Local Governmental Affairs Support Program)	Governmental Affairs Director Finance Director	On-going	Continuous
CP -Provide publicity of Equal Opportunity in Housing through Calendar	Coordinate Equal Opportunity in Housing calendar program with local associations	Communications/Marketing Director	On-going	Continuous
NI -Coordinate news releases on housing information with local associations	Utilize housing data to create and deliver customized news releases for local associations to promote local association	Communications/Marketing Director	Begin 01/08 (or 03/08 for first Quarter)	Data being gathered; news releases not started
CP -Compile and maintain current information & data on each local association	Work with local associations to capture housing information for regular publications; various uses (see above)	Communications/Marketing Director	On-going	Started, not fully implemented

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PUBLIC POLICY & GOVERNMENTAL AFFAIRS	TACTICS	ASSIGNMENT	TIMELINE	STATUS
CP -Identify 2009 Legislative Initiatives; prioritize; develop strategy for passage, amendments, etc	Occupational taxation; health insurance coverage; independent contractor issues; licensing across state borders; post licensing education	Governmental Affairs Director Lobbyist	On-going	Continuous
CP -Improve RPAC fundraising efforts; increase participation	Deliver on-line billing, expand current fundraising programs	Governmental Affairs Director	On-going	Continuous; on-line billing started 08-08
NI -Promote Economic Development opportunities to local associations; participate statewide	Provide various information on economic development opportunities to local associations; encourage participation; participate with other organizations on a statewide basis	Governmental Affairs Director EVP	Begin promotion in 01/08	Task Force formed; local association representation invited to participate
NISP -Develop Local Contact Network similar to NAR FPC program	Identify REALTORS who have a personal relationship with legislators; provide training program and information for contact for legislative issues	Governmental Affairs Director	Complete by 09-08; host first training before 2009 legislative session	Not Started
NI -Develop local issues network; + Local Issues sub committee	Create opportunities for local associations to share local governmental issues	Governmental Affairs Director	Completed by 12/08	Not Started
CP -Maintain strong working relationship with KREC	Attend KREC meetings; maintain regular communications with Commissioners & KREC Director & staff	EVP Professional Development & Governmental Affairs Directors, others as needed	On-going	Continuous
CP -Ensure Legislative Ethics Compliance/reporting	Complete and file legislative ethics reports; financial reports accurately, timely	Finance Director GAD, EVP, Lobbyist	On-going	Continuous
NI -Provide appraisal information; deliver appraiser CE courses	Stay informed on appraisal issues; follow legislative issues; develop and deliver appraiser CE courses	Governmental Affairs Director Professional Dev. Director	Provide information beginning 02/08; offer courses by 09/08	Not started
NI -Deliver regular Legislative & Political information	Create regular communication tool during legislative session; provide legislative & political information to members throughout year in regular, identifiable format	Governmental Affairs Director Communications/Marketing Director	Legislative information to start 01/08; other information start 2Q08	Information provided less formally in 2006 & 2007
CP -Maintain strong working relationship with other groups	Continue Small Business Caucus membership, work with Builders, etc.	Governmental Affairs Director, EVP	On-going	Continuous

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COMMUNICATION/PUBLIC RELATIONS/MARKETING	TACTICS	ASSIGNMENT	TIMELINE	STATUS
CP -Provide regular communications and publications to members	Communicate information to members through 1-printed publication; 2-electronic newsletter & 3-intermittent e-mails	Communication/Marketing Director	On-going	1-scheduled to begin 09/07; 2 & 3 started and continuous
CP -Acknowledge and Promote Members & Associations Achievements through Awards & Recognition	Maintain program that recognized member and association achievement; increase participation and public recognition of awards	Communication/Marketing Director	On-going	Continuous
NI -Develop regular program to enhance and promote the value of a REALTOR	Develop printed and electronic promotional pieces for KAR & local associations to use to promote the value of a REALTOR	Communication/Marketing Director	Promotional items delivered by 12/08	Not started
CP -Promote REALTORS to other Housing Organizations, increase involvement	Continue sponsorship of Affordable Housing Conference; actively participate in various housing group	Communication/Marketing Director EVP	On-going	Continuous
CP -Create consistent look/message with use of logo in all three entities-KAR, KREEF, RPAC	Use logo on all printed and electronic products and materials; provide guidelines on format of all KAR-related printed and electronic items	Communication/Marketing Director EVP	Logo created 08-07; guidelines and consistency created by 06/08	Logo complete; guidelines created for internal use by 06/08
NISP -Develop meaningful, useful and user friendly website	Redesign website to make user friendly; compile and add useful information for members and public; promote the value of a REALTOR	Communication/Marketing Director	Redesign scheduled in 2008 budget	Redesign not started; website information continually updated

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PROFESSIONAL DEVELOPMENT	TACTICS	ASSIGNMENT	TIMELINE	STATUS
NI -Develop and deliver a plethora of courses to be licensed to & delivered by local associations	Identify members educational and training needs; develop on-line & classroom courses to meet those needs and license to local associations	Professional Development Director	Courses ready for licensure by 06/09	Not started
NI -Provide & Deliver Designation Courses cooperatively with local associations	Identify popular designation courses, work with local associations to deliver and promote	Professional Development Director	Courses delivered by 09/08; regular schedule ready by 01/09	CRS course offered
NI -Increase pool of instructors; provide instructor development	Identify new instructors; assist instructors with presentation skill development	Professional Development Director	Number of instructors increased by 12/08	Not started
CP -Continue with the KREC contract, implement changes where possible	Plan for continuance of the KREC contract for CE; examine for possible changes and suggest	Professional Development Director	On-going	Continuous
CP -Maintain current GRI program schedule; <u>increase participation</u> expand if possible	Deliver GRI programs through local associations; increase offerings if possible	Professional Development Director	On-going	Continuous
NI -Develop on-line CE courses, increase selection	Develop and deliver on-line CE courses; research available offerings & explore other opportunities	Professional Development Director	On-going; new courses to be developed & delivered in 2008	On-line courses sent to Commission 08/08; more courses to be developed
NI -Develop and deliver CE courses on technology & new trends	Work with KREC to identify new trends; develop and deliver technology courses	Professional Development Director	New courses to be developed in 2008; delivered in 2009	Not started

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