

# 2008 Annual Report

To be completed by Local Chapters for their

## Chapter Business Plan & Chapter Excellence Awards Entry Form

### **THE MISSION OF THE WOMEN'S COUNCIL OF REALTORS®**

We are a network of successful REALTORS® empowering women to exercise their potential as entrepreneurs and industry leaders.



*Positioning the Chapter as a Business Resource in the REALTOR® Community*

# 2008 Annual Report

## Chapter Business Plan *and* Chapter Excellence Awards Entry Form

This Annual Report serves three purposes and is required for local chapters to remain in good standing:

1. This form should be used as a template/worksheet for creating your 2008 Chapter Business Plan. This is usually done by the President-elect and her Team in the Fall preceding her term. Do not submit this work; it is for your planning reference only.
  2. This form also serves as the mandatory Annual Report that all chapters are required to complete and submit, with supporting documentation as indicated, by February 3, 2009. Here you are documenting actual versus planned results. Failure to submit the completed report will result in dissolution of the chapter.
  3. Upon receipt of the completed report and documentation, National WCR determines the chapter's eligibility for recognition in the Chapter Excellence Awards Program.
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### Submission Rules:

- The Annual Report form must be used as provided. Please do not separate entry pages with other sheets of paper or documentation.
- The Annual Report and required documentation should be bound in a *small* folder or by a binder clip.
- Keep the documentation concise. Provide only what is requested. Do not include any excess material (photographs, videos, decorative pieces, etc.) If you are unclear on documentation requirements, please contact the national office before submitting the Annual Report.
- Clearly label each piece of documentation with the question number it supports.
- The Annual Report and documentation must be complete and submitted together. No modifications, corrections or alterations will be allowed, once the report is submitted. If you are unclear on documentation requirements, please contact the national office before submitting the Annual Report.

### Award Guidelines & Chapter Eligibility

Awards are given for the total number of points earned over the calendar year. *Any number* of local chapters can be recognized at an award level. To be eligible, a chapter must have at least 20 Active REALTOR® or REALTOR-Associate® national members.

Chapter Annual Reports and documentation must be received by the national office on or before **February 3, 2009**. Entries submitted after this date will not be considered for the awards program.

Award winners will be announced and recognized at the 2009 Midyear Meeting Awards Dinner in Washington, D.C.

## Award Categories

There are two levels of achievement:

**Silver Level:** Awarded to all chapters that have demonstrated they are creating membership value through effective chapter operations.

<u>Chapter Category</u>	<u>Points Required to Win</u>
Mega (more than 80 national members):	170
Large (50-79 national members):	170
Small (20-49 national members):	155
New (a chapter that is less than three years old):	145

**Gold Level:** Awarded to all chapters whose performance exceeds Silver Level performance, thus demonstrating truly outstanding membership value creation.

<u>Chapter Category</u>	<u>Points Required to Win</u>
Mega (more than 80 national members):	200
Large (50-79 national members):	200
Small (20-49 national members):	185
New (a chapter that is less than three years old):	175

## Chapters of the Year

Local chapters also have the opportunity to be named Chapter of the Year. The highest scoring chapter in each of the four Chapter Categories will receive this award.

<u>Chapter Category</u>
Mega (more than 80 national members)
Large (50-79 national members)
Small (20-49 national members)
New (a chapter that is less than three years old)

*NOTE: Chapters are assigned to their size categories based on the official count of national members on October 31, 2008. Chapters with fewer than 20 Active REALTOR® or REALTOR-Associate® national members are ineligible for an award.*

## State Chapter Awards

State chapters will also have an opportunity to be recognized in the category of State Chapter of the Year. Awards will be based on the percentage of their local chapters performing at either the Gold or Silver Award level.

*EXAMPLE: A state has a total of 30 local chapters. Of these 30 chapters, 25% achieved Silver and 45% achieved Gold.*

*25% X 1 point = 25 Points*

*45% X 1.5 points = 67.5 Points*

*Total Points = 92.5 Points*

The state chapter with the highest point total in each category will receive this award.

### State Chapter Category

Super Mega State (25 or more chapters)

Mega State (11 - 24 chapters)

Large State (5 - 10 chapters)

Small State (2 - 4 chapters)

Ineligible (0 - 1 chapter)

*NOTE: State size will be based on National's official count of local chapters on October 31, 2008.*

## 2008 Annual Report

Local Chapter Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Chapter Size Category: \_\_\_\_\_

*Chapters may leave this blank if they wish. National WCR will determine size category based on the official count of national members on October 31, 2008.*

*Mail entry to WCR, 430 North Michigan Ave., Chicago, IL 60611  
Please call 800-245-8512 with questions.*

## CHAPTER PROFILE SECTION

Complete this section using your Chapter Profile information. Profile information will be posted online on wcr.org after December 1, 2008. *Chapter Profile information will also be emailed to the Chapter Presidents and Presidents-elects.*

**Chapters may leave Questions 1-4, and Question 23, blank if they wish National WCR to do the calculations for them.**

- 1.) Chapter Charter Year
- |                 |            |              |
|-----------------|------------|--------------|
| 2006 or later   | [1 point]  |              |
| 1981-2005       | [2 points] |              |
| 1961-1980       | [3 points] |              |
| 1960 or earlier | [4 points] | _____ Points |
- 2.) Enter the chapter's Total Members on March 31, 2008 here: \_\_\_\_\_.
- If this number is greater than or equal to:
    - 50 add [5 points] \_\_\_\_\_ Points
    - 100 add *an additional* [5 points] \_\_\_\_\_ Points
  - If this number is greater than the previous year at March 31, 2007, add [5 points] \_\_\_\_\_ Points
- (Maximum points possible: 15)
- 3.) Enter the chapter's number of New Members for the period November 1, 2007 - October 31, 2008 here: \_\_\_\_\_.
- If this number is greater than the previous year's period between November 1, 2006 - October 31, 2007, add [5 points] \_\_\_\_\_ Points
- Add points based on New Members as a percentage of Total Members:  
(Based on the official count of national members on October 31, 2008.)
- Up to 10% of members are new members [2 points] or
  - 11% or more members are new members [5 points] \_\_\_\_\_ Points
- (Maximum points possible: 10)
- 4.) Enter the chapter's Renewal Rate on March 31, 2008 here: \_\_\_\_\_.
- If this number is greater than:
    - 70% add [2 points]
    - 75% add *an additional* [3 points]
    - 80% or better, *add another* [4 points] \_\_\_\_\_ Points
  - Add an additional [3 points] if this year's renewal rate is better than the previous year's renewal rate on March 31, 2007. \_\_\_\_\_ Points
- (Maximum points possible: 12)

**COMMUNICATIONS**

- 5.) The chapter has a paper or electronic newsletter that is produced and distributed at least quarterly.  
(Enclose a copy of *one* issue from each quarter.) [10 points] \_\_\_\_\_ Points
  
- 6.) The chapter sends out reminders prior to membership meetings.  
(Document by submitting copies of faxes, e-mails or snail mail pieces. One piece of documentation per program.) \_\_\_\_\_ Points  
[1 point] per program (*Maximum points possible: 8*)
  
- 7.) The local REALTOR® Association Executive (or other staff person) is a *national* WCR member of your chapter.  
\_\_\_\_\_  
(Must provide name of WCR member for verification.) [5 points] \_\_\_\_\_ Points
  
- 8.) In 2008, anyone from the Chapter has posted a Program Idea on the WCR Speakers & Programs Message Board in the Member Center at [www.wcr.org](http://www.wcr.org). (Provide a printout of each posting.) [1 point] per posting  
(*Maximum points possible: 5*) \_\_\_\_\_ Points
  
- 9.) The chapter has a Web site displaying the current WCR Mission Statement (Provide Web address and printed copy of the *relevant* Web site page.):  
[http://www.\\_\\_\\_\\_\\_](http://www._____) [2 points] \_\_\_\_\_ Points  
  
A.) Add [2 points] for a working link to at least two of the following: *wcr.org*, *realtor.org*, State REALTOR® Association and/or Local REALTOR® Association  
(Provide printed copy of relevant Web site page). \_\_\_\_\_ Points
  
- 10.) In 2008, the Chapter was featured in a non-WCR published article (print or electronic). (Must provide documentation of publication.) [1 point] per article. (Maximum points possible: 5) \_\_\_\_\_ Points

**CHAPTER EFFECTIVENESS & MEMBERSHIP VALUE**

- 11.) The chapter held eight (8) membership meetings with programs in the calendar year.  
(Document by submitting copies of meeting agendas distributed to members at the time.) \_\_\_\_\_ Points  
[30 points; no partial points awarded]

- 12.) Provide dated documentation that all chapter meetings and programs for the year were scheduled (no TBAs) AND announced to your members by January 17, 2008 [10 points] \_\_\_\_\_ Points
- 13.) Chapter Submitted 2008 Businesswoman of the Year Award Recipient Name and Nomination Form to National WCR by December 1, 2008. [2 points] \_\_\_\_\_ Points
- 14.) The chapter builds its WCR identity as a REALTOR® resource by delivering programs that enhance performance. For full points, each of the 5 performance management areas should be addressed at least once. (Provide documentation). [2 points] per program (Maximum points possible: 16) \_\_\_\_\_ Points

**5 PERFORMANCE MANAGEMENT AREAS**

*Planning Tip: See LPPM and the Member Center Speakers & Programs Message Board for additional program ideas.*

**Negotiation Strategies & Practice**

- Communicating effectively under pressure
- Client counseling/advocating for the client
- The art of influence and persuasion

**Networking/Professional Credibility/Business Builder**

- Networking skills
- Keynote by an elected official (e.g. mayor or school superintendent)
- Legal or legislative update (e.g. Zoning, Mediation or Do-Not-Call)
- Top Producer, Escrow or Brokers Panel
- Economic Forecast

**Business Planning & Systems**

- Team building and/or coaching skills
- Change management
- Effective meetings/meeting management
- Time management

**Personal Performance Management**

- Critical thinking
- Time management
- Conflict management
- Challenging oneself/developing a personal vision

**Cultural Awareness**

- Cultural preferences in buying and selling
- Fair Housing
- NAR "At Home with Diversity"

EXAMPLE:

	<u>Program Topic</u>	<u>Performance Management Area</u>
1	<u>Creating a Better Business Plan</u>	<u>Business Planning &amp; Systems</u>
2	<u>Communicating on Behalf of Your Client</u>	<u>Negotiation Strategies &amp; Practice</u>

	<u>Program Topic</u>	<u>Performance Management Area</u>
1	_____	_____
2	_____	_____
3	_____	_____
4	_____	_____
5	_____	_____
6	_____	_____
7	_____	_____
8	_____	_____

PROGRAM BONUS POINTS:

a.) For each of the programs that were a joint meeting with another real estate group (WCR Local Chapter, Local REALTOR® Association, CRS Chapter, Franchise Office, or another Professional Women’s Organization, etc.), add [2 points]. (Provide clearly labeled documentation showing date of program and groups involved.)

	<u>Date of Program</u>	<u>Groups Involved</u>
1	_____	_____
2	_____	_____
3	_____	_____

(Maximum points possible: 6) \_\_\_\_\_ Points

15.) The chapter provides scholarship funds for non-office holding national members to attend WCR related educational or organizational events. (Attach a copy of 2008 budget showing these allocations. Minimum of \$500.) [1 point]

\_\_\_\_\_ Points

**GOVERNANCE**

- 16.) The chapter reported its 2009 officers to National WCR by November 1, 2008. (National WCR will verify.) (Reported members must be eligible to hold their position at the time of submission.) [2 points] \_\_\_\_\_ Points
- 17.) The chapter prepared a balanced budget for the year 2008. (Provide copy). [10 points] \_\_\_\_\_ Points
- 18.) The chapter governing board met six times in 2008. (Minutes must be attached). [5 points] per meeting (*Maximum points possible: 30*) \_\_\_\_\_ Points

**LEADERSHIP DEVELOPMENT**

- 19.) The chapter held at least two new member orientations during 2008. Program must include:
- WCR's Mission Statement, Vision and Long-Term Goals
  - The value of getting involved
  - Member benefits including *Referral Roster, Connections* WCR Web site and the Performance Management Network Designation
- (Provide an agenda for each orientation showing the date of the program and demonstrating that these topics were covered.)  
 [6 points if held 2 programs, 3 points each for 3<sup>rd</sup> or 4<sup>th</sup> program. Maximum 12 points] \_\_\_\_\_ Points
- 20.) The chapter implemented the "Task Is to Ask" Program. Document by attaching 5 (five) Project Evaluation Forms (included in the "Task Is to Ask" kit) completed by non-office holding volunteers. [8 points] \_\_\_\_\_ Points
- 21.) The chapter provides funding for its officers to attend WCR national and state meetings (at least \$500 annually per officer). (Attach a copy of 2008 budget showing these allocations.) [2 points] per officer; maximum 4 officers \_\_\_\_\_ Points

	<u>Officer</u>	<u>Amount of Funding</u>
1	_____	_____
2	_____	_____
3	_____	_____
4	_____	_____

22.) (a) Chapter officers registered and attended important 2008 WCR organizational events.  
 (Documentation can include registration form, expense report, roster of attendees. Please provide only one piece of documentation per officer per event.)

Date of 2008 WCR State Orientation \_\_\_\_\_

NOTE: You may only circle a number if the number above it is also circled. For example, the Vice President of Membership can earn [3 points] for attending the Midyear Meeting only if both the President-elect and President also attended.

CIRCLE POINTS EARNED, THEN TOTAL AT BOTTOM	WCR Midyear Meeting *	WCR National Meeting *	Leadership Academy *	2008 WCR State Orientation *
President Name: _____	1	2		2
President-elect Name: _____	2	3	7	3
Vice President of Membership Name: _____	3	4		4
TOTALS				

\* Midyear Meeting: Officer must register WCR as their primary affiliate and have paid applicable WCR registration fees. National will verify.

\* National Meeting: Officer should register WCR as primary affiliate; however, points may be given if officer includes proof of NAR Full Registration. Proper documentation includes registration forms and/or expense reports.

\* State Orientation: This is a WCR meeting held by the WCR State Chapter to train 2008 Local Chapter Leadership. The program may have been held in 2007 or 2008. Proper documentation includes registration form, expense report, and/or roster of attendees from State Chapter or other State Chapter confirmation (letter, e-mail and/or fax).

22.) (b) For any member that attended either the 2008 Mega-Networking Summit II or the 2008 Influential Women Summit. [1 point per member]; (Maximum points possible: 6)

	Name	Program Attended
1	_____	_____
2	_____	_____
3	_____	_____
4	_____	_____
5	_____	_____
6	_____	_____

\_\_\_\_\_ Points

**PERFORMANCE MANAGEMENT NETWORK DESIGNATION**

23.) Calculate the percentage of the chapter's members who hold the Performance Management Network Designation and add that many points. (e.g. if 11% hold the PMN, claim [11 points].)  
*(National WCR will verify. Percentage will be calculated based on the chapter's REALTOR® membership as of 10/31/08.)* \_\_\_\_\_ Points

24.) The chapter sponsored, or jointly sponsored (with another WCR chapter, local or state REALTOR® association or local real estate school) one of these four Performance Management Network courses:

- Networking and Referral Systems***
- Effective Negotiating for Real Estate Professionals***
- The Business of Your Business: People, Planning, Money & Management***
- Harnessing the Power: Skills Based Performance Management***

(Provide documentation and date.) [10 points] per course  
*(Maximum points possible: 20)* \_\_\_\_\_ Points

\_\_\_\_\_ **GRAND TOTAL**