



**East Central South Dakota
Board of REALTORS®**

Strategic Plan

Created at Retreat Held: March 10, 2015

Plan Prepared For:

***East Central South Dakota Board of REALTORS®
PO Box 423
Brookings, SD 57006***

Strategic Planning Session Facilitated By:



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Retreat Agenda:

9:00	Introductions, opening remarks and initial thoughts
9:30	Overall Leadership Team Directives-training
10:20	Break
10:30	Leadership training, team building, and core standards Strategic Planning in Detail-including creating our Mission statement
11:45	Lunch
12:15	NAR Core Standards in depth
1:45	Closing and wrap up

We had a great group in attendance, although several were unable to make the time for this event. This is one of the core focuses of the leadership team, seeking the value of involvement for members and leaders alike. We spent a good portion of the morning on leadership training, the role of the Association, and how and why the Core Standards came to be. We discussed the big picture, the role of the leadership team, and for the members they serve. ECBR has never had a Vision nor Mission Statement, and this was their first Strategic Planning event in history. From these discussions, they did an excellent job of creating their value statements and with this clarity, planning, education and discussion ensued on where we are and where to go.

ECBR has had some challenges with the role out of the Core Standards, with confusion, misinformation and some fear surrounding them, how and why they are the way they are, and what it means for/to them in the future. Excellent discussions, and in depth Q & A were a part of the day. They have not done annual planning, training, nor big picture reviews so the timing of this event was very good. We spent a portion of the morning session focused on the cheerleading required from leadership. Although their AE is part time, she has clearly done a great job of working through the needs of the Association.

Throughout the day we worked on building a unified team, getting members of leadership to work effectively, and focusing on results. We discussed the challenges faced with too many initiatives and not enough involvement, nor enough staff, to get them all done, and very clearly identified that the only way the initiatives developed in this plan will get done is if the current and future leadership teams work as teams, all take responsibility and accountability to get the Association to these results. All recognize and agreed it is not all up to the President and/or the AE to accomplish the attached plan.

Strategic Plan Certification

This Strategic Plan included leadership training, the role of our local Association as it relates to the state and National levels, and an overview and training session on all six Core Standards. We developed within our plan specific sections identified as Strategic Objectives#1, 2 and 4 covering Advocacy, Consumer Outreach, and Technology components of the required Core Standards.

This plan has been officially adopted by the Board of Directors of the East Central South Dakota Board of REALTORS® (ECBR). It will be reviewed annually by the Board of Directors and submitted to NAR for approval.

Board of Directors approval:

Date: _____

President's signature

Date: _____

President-Elect's signature

Date: _____

Association Executive's signature

Date: _____

Facilitated By: Daryl L. Braham
iON Leadership Consulting

Date: March 10, 2015

Vision

We are the trusted voice in real estate, providing education and value, advocating for the members we serve.

Mission

We exist to help our members be more successful in real estate.

Strategic Objective #1:

Engage Members in Advocacy: *Continue to be a leader in RPAC locally and at the state level; be and remain influential to our members and the public, and further the business interests of our members and the Association by:*

1. Continue to utilize Below the line dues billing:
 - a. It was determined that as ECBR is such a leader in RPAC, focus will remain in other areas of RPAC promotion and education, rather than focusing on dues billing
 - b. Research adding NAR and/or SDAR RPAC inserts on education and promotion of RPAC as part of dues billing (possibly customized for ECBR specifically)

2. Continuing to promote RPAC:
 - a. Determine and track S.M.A.R.T. goals for dues billing (Specific, Measureable, Attainable, Realistic and with Timeframes)
 - b. Promote investment at meetings, events, and annual functions of ECBR
 - c. Ensure the entire leadership team continues to actively promote and educate on the value of RPAC
 - d. Research RPAC wins and selling statements, and ensure education to leadership team
 - e. Utilize brochures and materials provided by NAR and SDAR when possible
 - f. Research implementing fun orientated contests, and seek new opportunities for fun-oriented competitions at various ECBR opportunities (fun"draising")
 - g. Continue to focus on 50% or more participation goals
 - h. Create a graphic/chart to simplify and track progress toward RPAC goals
 - i. Continue to set ECBR specific goals for all fundraising efforts, not simply accepting the targets created by SDAR or NAR

3. Improve the results in NAR and SDAR calls for action:
 - a. Provide additional materials and specifics on the value of taking action
 - b. Continue to promote the NAR Action Center App and how to fully register and use it
 - c. Determine and track S.M.A.R.T. goals for local calls for action participation
 - d. Research implementing fun promotional challenges for office participation

Objective #1-Advocacy-Continued

- e. Continue to be a leader in the state and among all other local boards
 - f. Continue to focus on the successful implementation of NAR's Broker Involvement Program
4. Enhance our role in Advocacy:
- a. Gathering data specific to the role, function, and successes of RPAC and disseminate that information to members and consumers to show the impact, benefits, and the successes of the program directly as WIIFM (What's In It For Me)
 - b. Make sure leadership speaks with one supportive voice on the benefits of RPAC
 - c. Investigate developing a task force to research the 2015 (and future) REALTOR Party programs offered and made available through the annual Resource Guide and provide recommendations to leadership on what ECBR might utilize (<http://www.realtoractioncenter.com/realtor-party/documents/MRP-Resource-Guide.pdf>)
 - d. Continue to, or begin to:
 - i. Interview and financially support legislative and political candidates
 - ii. Be involved and promote state legislative activities
 - iii. Support and promote the state day on the hill events, increasing participation
 - iv. Inviting political leaders to speak to ECBR leaders
 - v. To support Realtor members who seek positions in government
 - e. Clearly showing the 'WINS' with measurable information for membership
 - f. Seek to become involved in various community groups to promote real estate related issues and educate/influence wherever possible

Strategic Objective #2

Enhance Consumer Outreach: *We will focus on increasing Public Relations efforts to both members and consumers by:*

- 1. Being the "Voice for Real Estate":
 - a. Building our relationships with local media
 - b. Provide monthly and/or quarterly stats to all local media outlets
 - c. Seek opportunities to improve and/or continue P/R in all forms of media, including:
 - i. For member involvement at state and national levels
 - ii. Local officer positions and elections, and ROTY and awards
 - iii. Cumulative success stories of the Association and members
 - iv. NAR and SDAR provided press releases on housing
 - v. Promotions through social media to members and the public
 - d. Seek opportunities to have local leadership interviewed in various media

Objective #2-Consumer Outreach-Continued

- e. Determine if opportunities exist to generate cumulative PR specific to what ECBR has historically achieved for its members, consumers, and community, including annual funding allocations where applicable
2. Expanding and continuing our visibility in Community Involvement:
 - a. We will continue to be involved in, promote, and actively participate in the annual national REALTOR Ring Day Event each December benefiting the Salvation Army (www.realtoringday.com)
 - b. We will research additional fun competitive ideas surrounding Realtor Ring Day including office competitions, ugly sweater, local police and fire competitions, and other fun ways to promote ring day locally
 - c. We will remain involved in events such as:
 - i. REALTOR Read Day with local schools, researching opportunities to incorporate book giving and donations in conjunction with Read day
 - ii. Boys and Girls Clubs Garden Boxes, and others
 - d. We will seek additional community event opportunities by researching past events and will be visibly involved in at least one major event each year
 3. Engaging the public in our advocacy efforts:
 - a. Expand our use of NAR's On Common Ground magazine by reaching out to Ted Wright at twright@realtors.org
 - b. As noted above, research the implementation of a task force to utilize applicable NAR available programs
 - c. Research and support member involvement on city/county/municipality boards and other areas including school boards, planning commission, etc.
 4. Actively investing in our community:
 - a. We will continue to be involved in, or again get involved in programs such as:
 - i. Big Brothers/Big Sisters
 - ii. Project Joy for underprivileged kids
 - iii. Cooking, serving and paying for food for Harvest Meals
 - iv. Various United Way and Red Cross events
 - v. Back Packs for Kids
 - vi. And other annual events/ideas

Strategic Objective #3

Expand Member and Consumer P/R: *Focus our efforts to research and celebrate the wins of our small Association to create/improve our culture of accomplishments, including:*

- a. Research by office all member connections to our community to build a cumulative list of areas of help, assistance and success
- b. Research the past decade of wins by the Association, and begin to educate first members, then consumers on all the Association has accomplished

Objective #3-P/R-Continued

- c. Find creative ways through relationships to promote our gratitude of helping build our community over the past decade, and looking forward to the next
- d. Focus on wins, and celebrate wins at every event of the Association

Strategic Objective #4

Target Opportunities in Technology: *We recognize the importance of, and need for, a focused approach to technology. We will address this by:*

- a. Create and deploy an “Appy Hour” tech opportunity for technology education
- b. Reassessing our position and what we can do in technology for our members
- c. Seeking to partner with SDAR to bring added value in technology to our members and implement possible available tools
- d. Research creating a technology task force or work group to assess those needs and deliverables
- e. Introduce technology training as may be applicable for membership

Additional Objectives:

1. Research opportunities to implement annual leadership training which may include on RPAC, leadership fundamentals, NAR value, financial training etc.
2. Research a business based re-assessment of our dues formula and have a real determination of financial needs and services provided from the Association to our members
3. Focus on being the winning team, and share those wins with our members
4. Research the possibility of having our AE attend an annual NAR meeting, either Midyear or the Association Executives meetings
5. Have on-going discussions re merger possibilities with other local boards
6. Position the member at the front of everything ECBR does, with a clear focus on “what’s in it for me” (WiiFM)
7. Create specific and measureable goals on involvement, how many, why, and for what
8. Develop a clear and concise message from leadership to future leaders on the value of involvement and leadership within the Association
9. Focus on the 4 Disciplines:
 - a. Have WIGS (Wildly Important Goals)
 - b. Focus on Lead (future) not Lag (past) information
 - c. Have simple and easy to understand ways of reporting progress to membership
 - d. Have accountability, especially among the leadership

NAR Core Standard Objectives:

Our discussions included a historical overview, education and understanding of how NAR arrived at, and implemented, the new Core Standards. Some Q&A was held, and clarity of our local Association's role and current compliance within these standards was discussed and understood by all. As part of that dialogue, we discuss all aspects of the new requirements, including: (**BOLD** indicates specifically included within this plan)

1. Advocacy

- a. We will continue Below the line dues billing**
- b. We will continue to be a leader on the value of RPAC**
- c. We will promote participation in NAR Calls for Action**
- d. We will engage in statewide calls for action when applicable**
- e. We will provide a method for advocacy engagement for our Association**

2. Consumer Outreach (must perform 3 of 4)

- a. We will enhance opportunities as the Voice for Real Estate**
- b. We will promote our community involvement activities each year**
- c. We will expand our engagement of the public in legislative issues**
- d. We will expand promotion of our role in community programs including fundraising**

3. Code of Ethics-all areas covered with a partnership with SDAR

- a. We provide new and continuing education classes on the Code of Ethics
- b. We have a viable Professional Standards process
- c. We will include a link on our website to NAR Code of Ethics
- d. We understand and will provide mediation and ombudsman services

4. Unification Efforts

- a. Our bylaws will be reviewed every year
- b. We provide access to legal counsel
- c. We have, or will develop policies and procedures including filings as required by state laws
- d. Our Strategic plans include an advocacy component
- e. Our Association Executive will complete 6 hours of CE/year

5. Technology

- a. We have an interactive website**
- b. We have Association e-mail accounts and access**

6. Financial Solvency

- a. We will develop and implement policies to insure integrity of our operations
- b. We will complete an annual CPA review as applicable