



Northeast South Dakota Association of REALTORS[®], Inc.



Strategic Plan

Created at Retreat Held: March 11, 2015

Plan Prepared For:

***Northeast South Dakota Association of REALTORS[®]
818 S. Broadway, Suite 111
Watertown, SD 57201***

Strategic Planning Session Facilitated By:



Daryl L. Braham
iON Leadership Consulting
3511 Woodbury Park Drive S
Fargo, ND 58103
701-306-7185
dbraham@ionleadership.com
www.ionleadership.com

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
2:15	Closing and wrap up

We had a great group in attendance, including the majority of the board of directors and additional brokers as well. 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. NESD 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 statement and with this clarity, planning, education and discussion ensued on where we are and where to go.

NESD 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. Additionally, they just lost their AE of many years, and are in the middle of transitioning as a board. 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 they are seeking a new AE, we had great discussion about the role of volunteers and that of who will become their new AE, and how they must work together as a team to achieve results.

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, it is up to the team to make this happen.

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 Northeast South Dakota Board of REALTORS® (NESD). 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 11, 2015

Vision

To promote and maintain high standards of conduct and ethics in the real estate profession and to have this profession recognized as a valued asset to the community.

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. Determine and track S.M.A.R.T. goals for dues billing (Specific, Measureable, Attainable, Realistic and with Timeframes)
 - b. Once goals are set, create a simple way to track progress and ensure open dialogue and communication to/from members
 - c. Direct broker contact ahead of billing to promote support
 - d. Research adding NAR and/or SDAR RPAC inserts on education and promotion of RPAC as part of dues billing (possibly customized for NESD specifically)
 - e. Research new education opportunities to understanding where road blocks or areas of non-support may be and how to address

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 NESD
 - c. Ensure the entire leadership team continues to actively promote and educate on the value of RPAC, and speaks with one voice on “why” invest
 - d. Research implementing a “bring a buddy” concept for investors to seek like value investors to increase participation
 - 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 NESD opportunities (fun”draising”), including office challenges and recognition
 - g. Continue to focus on setting and increasing participation goals
 - h. Create a graphic/chart to simplify and track progress toward RPAC goals
 - i. Continue to set NESD specific goals for all fundraising efforts, not simply accepting the targets created by SDAR or NAR
 - j. Implement a 100% leadership and committee investor challenge

Objective #1-Advocacy-Continued

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
 - e. Research implementing a 100% “App” challenge among leadership, committees and as friendly competition among offices
 - 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 NESD might utilize (<http://www.realtoractioncenter.com/realtor-party/documents/MRP-Resource-Guide.pdf>)
 - d. Research implementing, or increasing:
 - 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 NESD leadership
 - v. Supporting 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. Placing articles in local media on quarterly or monthly stats
 - b. Provide monthly and/or quarterly stats to all local media outlets
 - c. Seek opportunities to have local leadership interviewed in various media

Objective #2-Consumer Outreach-Continued

- d. 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
 - e. Determine if opportunities exist to generate cumulative PR specific to what NESD 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.realtorringday.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 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. Utilize 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. Habitat for Humanity
 - ii. Salvation Army Fundraising Events
 - b. We will research involvement of membership to seek opportunities to have our Association directly involved in other areas community investment opportunities

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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
- 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. Seek ways to better understand public perception of our Association and members and adjust accordingly
3. Focus on clarity of the need and responsibilities of hiring a new AE, and communicate effectively for responsibilities and accountability, and research the possibility of having our him/her attend an annual NAR meeting, either Midyear or the AEI meetings
4. Research implementing mastermind and/leadership mentoring groups
5. Position the member at the front of everything NESD does, with a clear focus on “what’s in it for me” (WiiFM)
6. Discuss an RPAC and Ribs event, and promote **Ribs Prepared to Access Congress** and an RPAC promotion concept
7. Develop a clear and concise message from leadership to future leaders on the value of involvement and leadership within the Association
8. 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 continue to promote 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