



2018 Strategic Plan

Approved September 28, 2017



Strategic Framework

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VISION why

Real estate success through ethics, professionalism, and connections.

MISSION how

Bringing Resources to REALTORS®.

VALUE PROPOSITION what

Advocate. Educate. Connect.

Value Prop →	Goals →	Strategies →	Primary Committees	NAR Core Standards
Advocate	1. Develop legislative initiatives favorable to the real estate profession and private property rights.	A – Act and Vote B – Invest	Public Policy, Community Investment, and RPAC	Section 2 Advocacy
Educate	2. Provide resources that address emerging trends, enduring practices, ethics and professionalism.	A – Ethics and Professionalism Training B – Classes and Communications C – Hot Topics Messaging	Communications, Education, YPN	Section 1 Code of Ethics
Connect	3. Promote the value of REALTORS® and association membership, internally and externally.	A – Member Outreach B – Leadership Development C – Consumer and Media Outreach	Communications, ROC, Awards, YPN, Nominating	Section 3 Consumer Outreach and Section 5 Technology
Manage	4. Provide the resources, strategies, and structure to properly manage the association.	A – Operations Review B – Financial Review C – Performance Review	Executive, Bylaws, Budget	Section 4 Unification Efforts and Section 6 Financial Solvency

ADVOCATE / GOAL 1 — Develop legislative initiatives favorable to the real estate profession and private property rights.

Strategy A — Act and Vote

Public Policy Committee | Director of Government Affairs

1. Monitor and advise action on legislation and policy issues related to real estate, housing, private property rights, etc., in the county, municipalities, neighborhoods, school districts, etc.
2. Develop messaging, resources, and initiatives to address housing affordability in our region, in collaboration with local governments and related organizations.
3. Distribute quarterly public policy newsletters to members, elected officials, etc., localizing and translating federal and state issues, discussing local regulations and issues (using simple, clear, relatable stories and statistics, sharing the potential result of action/inaction).
4. Host quarterly meetings with leaders from related local organizations (IHFA, builders, NeighborWorks, lenders, developers, etc.) to develop joint legislative initiatives and/or media strategies, where necessary.
5. Utilize NAR's "Homeownership Matters" program, in collaboration with IR, to engage consumers in CFAs, when possible, and for consumer communications.
6. Coordinate candidate interviews prior to local elections to inform endorsements, campaign contributions, and/or independent expenditures, and encourage REALTORS® and the public to vote in all elections.

Per Core Standards:

- Achieve at least 20% member participation in national, state, and local Calls-For-Action, when applicable.

Strategy B — Invest

REALTORS® Political Action Committee | Director of Government Affairs

1. Public Policy Committee to oversee the Community Investment Task Force, which identifies grants and resources from NAR and others to be used in our region, or in collaboration with the REALTORS® Foundation. (GAD to facilitate grant applications, distribution, etc., with the appropriate groups.)
2. BRR's GAD to collaborate with the Foundation Board to oversee the Community Impact Grants, for community projects not applicable for an NAR grant or that fall outside of the Foundation grant cycle/criteria.
3. Highlight RPAC initiatives and successes, encouraging further investments, through the quarterly public policy newsletter.

Per Core Standards:

- Support the REALTOR® Party's "Vote-Act-Invest" goals by completing at least two (2) activities from NAR's [REALTOR® Party Resource Guide](#); BRR will complete this through the annual Major Investors' Dinner and other recognition events, promotional brochures, and the YPN/RPAC Pub & Putt.
- Include voluntary \$30 RPAC contribution on dues billing statement "Above the Line" and provide information about the "Value of Investing and Benefits Received" by including a "Learn More About RPAC" link on our website and other member communications.
- In collaboration with the Director of Membership and Education, identify licensees in limited function referral organizations (LFRO) and invite them to participate in BRR's political advocacy efforts.

EDUCATE / GOAL 2 — Provide resources that address emerging trends, enduring practices, ethics, and professionalism.

<p>Strategy A — Ethics and Professionalism</p> <p><i>Education Advisory Group Director of Membership and Education and Director of Communications</i></p>	<p>Strategy B — Classes and Communications</p> <p><i>Education Advisory Group and Communications Advisory Group Director of Membership and Education and Director of Communications</i></p>	<p>Strategy C — Hot Topics Messaging</p> <p><i>Communications Advisory Group Director of Communications and Director of Events and Community Engagement</i></p>
<ol style="list-style-type: none"> 1. Host, cross-promote, or develop classes focused on the Code of Ethics and Professionalism. 2. Weave professionalism tips and standards of practice into all programs and services. Show how ethics and professionalism standards and practices can improve business, differentiate services, and ultimately lead to a more successful (sustainable) business. 3. "Leading by Example" — Highlight professionalism of members through peer-to-peer accolades, sharing best practices, making it real and visible. 4. Through the weekly Broker Bulletin, and in collaboration with IR and IREC, at least quarterly, create and share case studies and summaries of ethics and pro standards issues, complaints, etc. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Provide new and continuing member Code of Ethics training. • In partnership with IR, offer Code of Ethics and Professional Standards enforcement, mediation, and ombudsmen services. • Maintain links to professional standards and arbitration filing processes on our website. 	<ol style="list-style-type: none"> 1. Host at least one (1) designation elective from CRS, ABR, or CRB. Explore ways for BRR or brokers to subsidize some of the cost of designation courses to encourage completion. 2. Collaborate with IR, other locals, and/or related organizations to cross-promote educational opportunities and events. 3. Offer education packages targeted to new members to help them complete their required classes on time. 4. In collaboration with BSU and/or the SBA, create training opportunities focused on business management and growth, targeting brokers and team leaders, but open to all members. 5. Utilize a new member communications platform, ClickDimensions, for more targeted messaging via email, text, and enhanced marketing campaigns. 6. Website security and enhancements, including improved backup practices, local web support and expertise in WordPress, ADA compliance, improved search and interactivity, possible members-only access, and integrations with ClickDimensions. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Provide at least one (1) class/activity in April promoting Fair Housing Month. • Provide at least one (1) activity in September promoting REALTOR® Safety. 	<ol style="list-style-type: none"> 1. Compile the timely and popular information of interest to consumers, into a "Content Corner" email feature, including content from the NAR and IR consumer campaigns, for members to utilize and repurpose in their own marketing. 2. Produce topical videos featuring staff, leadership, members, committee chairs, etc., posted to BRR's YouTube channel, as appropriate. 3. Enhance the local market reports with data from IMLS and other sources, providing graphics, videos, reports, and analysis for members to use, and to share with the media. This may include purchasing additional stats tools from a third-party vendor directly or in collaboration with IR and/or IMLS. 4. Host a Mid-Year Housing Summit (held in July) featuring market, economic, and legislative updates from BRR and partners organizations. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Be the "Voice for Real Estate" by promoting and analyzing monthly, etc., market statistics from NAR.

CONNECT / GOAL 3 — Promote the value of REALTORS® and association membership, internally and externally.

<p>Strategy A — Member Outreach <i>Director of Events and Community Engagement, Director of Membership and Education, and Director of Communications</i></p>	<p>Strategy B — Leadership Development <i>Nominating and Elections Committee Chief Executive Officer</i></p>	<p>Strategy C — Media Relations and Community Engagement <i>Foundation and its Committees Director of Events and Community Engagement and Director of Communications</i></p>
<ol style="list-style-type: none"> 1. Plan and promote 1-2 member events per quarter, in collaboration with related Committees, including: Awards Gala (Mar), Spring Service Project (Jun), Mid-Year Housing Summit (Jul), Annual Membership Meeting (Sep), and Fall Service Project (Nov). 2. Organize quarterly 59-minute meeting/affiliate event following Board of Directors meetings (Feb, Apr, Aug, Nov). 3. Coordinate CEO and staff presentations at office meetings, and provide monthly talking points to brokers. 4. Improve the joining and orientation experiences, in collaboration with brokers to the same information about the association, required education, etc., is shared. 5. Identify ways to celebrate membership milestones at years 1, 5, 10, 20 and 40 (with Emeritus status). 6. Empower the YPN Advisory Board to serve as “BRR brand ambassadors,” engaging members through quarterly events, then encouraging participation in all association programs and activities, especially leadership opportunities and RPAC. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Provide links to BRR, IR, and NAR programs, events, and services on our website and in communications. 	<ol style="list-style-type: none"> 1. Work with Immediate Past President to mentor new and continuing Directors, to answer questions, prepare for meetings, etc. 2. Host bi-annual events focused on developing leadership skills, sharing industry insights (local and national), strategic plan updates, and networking. 3. Email monthly talking points to Directors and Committee Chairs to be shared at office meetings (theirs and others as scheduled by staff), to assist with issues mobilizations, and to keep informed on issues between meetings. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Host annual leadership orientation in January and provide other training, tools, programs, and resources throughout the year. 	<ol style="list-style-type: none"> 1. Position the CEO and President as primary media contacts for real estate issues, by coordinating meetings with reporters and by regularly and proactively providing market, industry, and general interest stories and press releases. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Engage in at least two (2) community service activities that enhance the image of the REALTOR® (for example, Paint the Town, Rake Up Boise, Habitat for Humanity, etc.) and conduct at least one (1) fundraiser to benefit local community or charitable organizations. • Provide members with consumer-focused materials, primarily from NAR and IR, as well as BRR’s social media feeds and the Content Corner email newsletter, promoting the value of using a REALTOR®.

MANAGE / GOAL 4 — Provide the resources, strategies, and structure to properly manage the association.

<p>Strategy A — Operations Review <i>Bylaws Committee Chief Executive Officer</i></p>	<p>Strategy B — Financial Review <i>Budget and Finance Committee Chief Executive Officer and Director of Finance and Administration</i></p>	<p>Strategy C — Performance Review <i>Chief Executive Officer</i></p>
<ol style="list-style-type: none"> 1. Conduct an annual review of the association’s bylaws and policies, to be approved by the Board of Directors and membership, as needed. 2. Review committee structure to identify opportunities for new leadership roles or task forces, changing some committees to advisory groups, and better establishing committee meeting times, work plans, and volunteer expectations. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Conduct an annual review of the strategic plan, to be approved by the Board of Directors, to ensure it includes advocacy and consumer outreach components, with actionable implementation strategies. • Maintain access to legal counsel. • Maintain corporate documents, policies and procedures that conform to local, state and federal laws. File legally required reports and documents (e.g., corporate renewal documents, state and federal tax returns, etc.) in a timely manner with assistance from the Director of Finance and Administration. 	<ol style="list-style-type: none"> 1. Annually review the investment policy and portfolio performance. 2. Analyze membership dues every 1-2 years per the Dues Review Policy and CPI-based Dues Formula. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Conduct an annual review of the association’s financial policies to ensure the fiscal integrity of the financial operations, to be approved by the Board of Directors, as needed. • Annually submit a report from a CPA which includes either an audit opinion or an accountant’s review report. It will be left to the discretion of the Board as to the frequency of an audit versus a review. • To ensure proper dues reporting and collection, compare our membership records to the list of non-member licensees as provided by IR, at least semi-annually. 	<ol style="list-style-type: none"> 1. Conduct quarterly and annual performance reviews with Program Directors. In addition, Program Directors who manage staff will conduct annual performance reviews and report back to BRR’s Chief Executive Officer. <p><i>Per Core Standards:</i></p> <ul style="list-style-type: none"> • Conduct quarterly and annual performance reviews of BRR’s Chief Executive Officer using evaluation form from NAR. • Complete at least six (6) hours of REALTOR® association professional development on an annual basis, as offered by IR and NAR.