



**BISMARCK MANDAN
BOARD OF REALTORS®**

Strategic Plan

Created at Retreat Held: Thursday, November 13, 2014

Adopted by the Board of Directors on December 18, 2014

Plan Prepared For:

***Bismarck Mandan Board of REALTORS®
318 West Apollo Ave.
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Strategic Planning Session Facilitated By:



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Retreat Agenda:

9:00	Introductions, opening remarks and initial thoughts
10:00	Overall BMBOR Objectives
10:30	Break
10:40	Leadership training
Noon	Lunch
12:30	Where are you now, and what does it mean to be the leadership team What's Changed/Current Conditions NAR Core Standards
1:50	Break
2:00	NAR Core Standards-In depth
3:00	Positive Overview
3:35	Closing and wrap up

We spent a significant portion of the morning on leadership training, unity and building the members of leadership to work more effectively as a team to generate bigger, better results. We discussed what it takes to be a leader, and, more importantly, their role as a team for the members they serve. We had a brief overview of prior planning sessions, focused on the difference between business planning and strategic planning, and spent time working as a group to understand where BMBOR is now vs. other Associations around the country. We discussed the challenges faced with too many initiatives and not enough involvement, nor staff, to get them all done.

BMBOR has done an exceptional job of programs, community support, prior year planning, and overall leadership orientations. There was considerable discussion on professionalism and RPAC, along with the Core Standards and how they came to be. We developed a Vision statement for the Association, and completely reworked its Mission statement, both focused on the members they serve. An overwhelming awareness of past successes became clear, including the desire to work on enhanced communications of those successes. We developed a great set of overall objectives, and an understanding of what BMBOR will focus on.

Vision

Our association and its members are trusted and respected as the voice of real estate.

Mission

We advocate for the success of our members.

Core Objectives

Objective#1:

We will continue to educate our members on, and comply with, the Core Standards as established by the National Association of REALTORS®.

Objective#2:

We will insure a single voice from the leadership of our Association, and share our Vision and Mission with our membership.

Objective#3:

We will focus on continuing to raise the bar in professionalism with members and brokers.

Objective#4:

We will research and provide “world-class” education for our members.

Objective#5:

We will enhance our political involvement through current and new initiatives.

Objective#6:

We will research financial policies regarding reserves and restricted funds in order to update and strengthen our financial reserves policies.

Objective#7:

We will research the feasibility of creating a regional MLS.

National Association of REALTORS® Core Standards

We will provide the tools, training and resources required to meet NAR's Core Standards.

Goal #1 - Advocacy

1. Our Association does "Above the Line" dues billing, and we will:
 - a. Continue to provide information and seek investment at the prior year level of each individual member
 - b. Continue our focus direct to members, as well as providing focused efforts with member brokers
 - c. Research updating our e-mail information with links and educational materials on the value of RPAC and investing annually
 - d. Insure one voice for leadership regarding RPAC dues billing

2. We will communicate and promote the value of RPAC by:
 - a. Promoting investment and providing education on the role, function, and success of RPAC at meetings and events including the annual fundraising luncheon
 - b. Utilize NAR and NDAR resources including brochures, grants, and materials
 - c. Continue to implement contests at social events, and provide recognition to/for investors; at all times, keeping everything "fun"
 - d. Insure clear directives and goals from leadership to the RPAC committee
 - e. Create a graphic/chart to track progress at various events against BMBOR RPAC fundraising goals

3. We will educate members on the importance of Calls for Action by:
 - a. Providing additional materials and specifics on the value of involvement
 - b. Showing measurable information on wins and communicating those to membership
 - c. Promote the NAR Action Center App including demos on how to get it and use it, and develop a 100% Committee "App Challenge"
 - d. Set goals for local calls for action participation
 - e. Provide education to Brokers on the importance of participation and taking action

4. We will enhance our role in Advocacy by:
 - a. Developing a task force to research the 2015 REALTOR Party programs and utilize as appropriate.
 - b. Promoting and supporting the NDAR Legislative Impact Day
 - c. Inviting legislative leaders to BMBOR lunches and other events and educating them on REALTOR and real estate issues

- d. Remaining active with local, county, and state political boards and committees to ensure a REALTOR® voice at the table
- e. We will continue to screen and provide RPAC funding for candidates who support Realtors, private property rights, and home ownership

Goal #2 – Consumer Outreach

1. Being the “Voice for Real Estate”
 - a. We will communicate with local media and associations via news releases, interviews, radio talk shows, etc. and provide statistics, member awards and recognition, and other related information.
 - b. We will continue to promote and advertise the value of ‘R’ and using a REALTOR, including the benefit of accuracy and websites that consumers should use
 - c. Continued promotion to members of the importance of wearing ‘R’ branding
 - d. We will continue to be involved in being the voice on issues and measures that impact private property rights
 - e. We will research past success and generate PR specific to what BMBOR has done for its members, for consumers, and for our community
2. Community Involvement
 - a. Continue support of local community events and programs, and provide direction to REACT regarding the number and types of events in which to be involved, including REALTOR® Ring Day.
3. Advocacy Efforts:
 - a. As noted, research the 2015 Realtor Party programs, including potential opportunities for independent expenditure events, by appointing a task force to discover programs we can utilize in 2015 and beyond
 - b. Continue meeting, interviewing, and educating potential government leaders before providing RPAC funding and support
 - c. Research member involvement and continue to encourage that involvement within area school boards, planning commission, and others
 - d. Involvement in and directly supporting state and local issues like Measure 2, flooding issues and legislation, pro-development programs and others
4. Community Investments
 - a. Continue to use grants as available from NAR
 - b. Continue to provide financial support as appropriate to community building opportunities like the coalition to bring American Airlines to our community and the Williston Basin Petroleum Conference
 - c. Remain actively involved in community programs like REALTOR® Ring Day and other projects as determined by REACT and the Board of Directors.
 - d. Research the possibility of involvement in community projects (example: the Interactive Park Project or others)

Goal 3 – Technology

We will continue to research and implement new, fresh, and innovative ideas to promote technology and its use to our membership, including

1. Items required to be in compliance with the Core Standards
2. Creating a Technology Committee, Task Force, or PAG (President’s Advisory Group) to become a driver of technology training such as “Appy Hour” and other member driven technology events as well as learning from other technology experts
3. Utilizing our website and other forms of technology to aid in member safety and awareness, highlighting “wins” of the association, and incorporating access to NAR resources.
4. We will add wins and other promotional material to deepen our website

Goal 4 – Committee Directives

As part of our planning process, we have many committees that serve BMBOR and recognize that the work our committees do is outstanding, in most cases completing what is asked of them with very little need for follow up to do so. For all committees, task forces or workgroups, we will delegate specific items from this plan with clear, direct, measureable directives and goals to be met. We will identify the most important goals first, and not over delegate too much to any one committee. Further we will provide promotion and recognition for the work done by our many committees, and continue to use them as a breeding ground for future leadership of our Association.

Additional Items:

Below are a series of additional discussion topics that generally fall under one or more of our stated Objectives and/or the Core Standards. For clarity, these are laid out in simple bullet point form to easily implement and track.

1. We had several thoughts, including:
 - a. Can we make lunches mandatory for members
2. How can we use the core standards to raise the bar for members
3. Several mentions of updated the standard for members to follow the golden rule was highlighted. An opportunity to use the new Code of Excellence to aid in this is clearly present.
4. We will continue our education to our members on the need for Realtor
5. At least one face-to-face with member brokers/year from leadership
6. Provide for, promote and track at least one in-person member training session annually
7. Create and promote a “what’s in it for me” format of defining proper etiquette
8. Take a closer look at governmental affairs committee and its role and opportunities
9. Explore two year term possibilities for leadership

10. Improve communication and leadership insuring that once the board votes, all directors are or get on the same page, proceed out of meeting with “one voice” as leadership
11. Develop a clear and concise message from leadership to future leaders on the value of involvement and leadership within the Association
12. Focus on effective communication to/from leadership and to/from/within the community

References – NAR’s Core Standards

- 1. Advocacy**
 - a. We will continue above the line dues billing
 - b. We do communicate on the value of RPAC
 - c. We promote and have achieved significant participation in NAR Calls for Action
 - d. We engage in statewide calls for action when applicable
 - e. We provide a method for advocacy engagement at all levels of our Association

- 2. Consumer Outreach (must perform 3 of 4)**
 - a. We are the Voice for Real Estate
 - b. We will continue our community involvement activities each year
 - c. We engage the public in legislative issues
 - d. We are involved in several community programs including fundraising

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

- 4. Unification Efforts**
 - a. Our bylaws and MLS Bylaws are reviewed every year
 - b. We provide access to legal counsel
 - c. We have policies and procedures in place including filings as required by state laws
 - d. Our Strategic and Business 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 multiple Association e-mail accounts and access

- 6. Financial Solvency**
 - a. We have strong policies in place to insure integrity of our operations
 - b. We complete an annual review