



**Williston  
Board of REALTORS®**

## ***Strategic Plan***

***Held over several meetings, finalized May 27, 2015***

***Plan Prepared For:***

***Williston Board of REALTORS®  
C/O Basin Brokers  
Williston, ND 58802***

Strategic Planning Sessions Facilitated By:



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**Meetings and Agenda:**

11/3/15	Initial meetings-afternoon Core Standards, Association requirements, how to move forward
12/10/15	Follow up meetings-afternoon Develop plan for AE needs Proposal for AE, requirements for leadership
February 2015	Work on By Laws, prepare for planning event, final needs
5/27/15	Strategic Planning Event-Exec Committee
5/28/15	Broker Roll Out and Q/A Event
5/28/15	General membership Roll Out and Q/A Event New By laws enacted New Board structure deployed

The Williston Board (WBR) has approximately 70 members and was at risk of not making the requirements needed. If not for the current leadership team, I strongly believe they would not have made it. Working with area Brokers, raising funding, setting a plan in motion and acting on the needs of the Association as a whole, the WBR is now primed to become a more successful Association than at any time in their history.

We have completely redesigned their leadership team, the roles and number of committees, and most importantly, have developed a structure to retain state staff for their AE support. Financials are being strenuously reviewed, and the focus to the future of what can be has been the driving force to their success.

For our actual strategic planning event, we worked together with the executive committee to develop what is and will be needed to make this happen. We discussed the big picture, the role of the leadership team, and for the members they serve. WBR 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.

Once past the challenges with the role out of the Core Standards, we had excellent discussions, spending time focused on the cheerleading required from leadership. We discussed the challenges faced with too many initiatives and not enough involvement to get them all done,

and developed a series of opportunities for now and the future for future leaders to implement. Overall, it has been an excellent journey, and some great volunteers.

**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 sessions 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 Williston Board of REALTORS® (WBR). It will be reviewed annually by the Board of Directors and submitted to NAR for approval.

Board of Directors approval:

Date: 6.9.15




President's signature

Date: 6.9.15



President-Elect's signature

Date: 6-9-15



Association Executive's signature

Date: 6-16-15

Facilitated By: Daryl L. Braham

Date: May 27, 2015

## iON Leadership Consulting

### Vision

*The WBR currently does not have a Vision Statement, realizes it's' importance, and will develop one in the future.*

### 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 Above the line dues billing:
  - a. WBR had over 95% participation in dues billing, and will continue to focus on those results in the future
  - b. Determine and track S.M.A.R.T. goals for dues billing annually (Specific, Measureable, Attainable, Realistic and with Timeframes)
  - c. Continue direct broker contact ahead of and after billing to promote support
  - d. Research utilizing NAR and/or NDAR RPAC information and links on education and promotion of RPAC as part of dues billing
  
2. Continuing to promote RPAC:
  - a. Determine and track S.M.A.R.T. goals for RPAC investments
  - b. Promote investment at meetings, events, and annual functions of WBR
  - 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 NDAR when possible
  - f. Research implementing fun orientated contests, and seek new opportunities for fun-oriented competitions at various WBR opportunities (fun"draising"), including possibly an RPAC hole at our annual golf event
  - g. Continue to focus on high participation goals
  - h. Create a graphic/chart to simplify and track progress toward RPAC goals
  
3. Improve the results in NAR and NDAR 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, provide solutions for roadblocks to constantly gain involvement

- c. Determine and track S.M.A.R.T. goals for 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
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. Continue to focus on the successful implementation of NAR's Broker Involvement Program
  - c. Make sure leadership speaks with one supportive voice on the benefits of RPAC
  - d. 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 WBR might utilize (<http://www.realtoractioncenter.com/realtor-party/documents/MRP-Resource-Guide.pdf>)
  - e. Research our ability to, and implement where possible:
    - i. Interview and financially support legislative and political candidates
    - ii. Be involved and promote state legislative activities
    - iii. Support and promote the state legislative impact days, increasing participation
    - iv. Inviting political leaders to speak to WBR leaders
    - v. To support Realtor members who seek positions in government
  - f. Clearly showing the 'WINS' with measurable information for membership
  - g. 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 providers
  - 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 NDAR 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 WBR 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](http://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. We will implement and use NAR's On Common Ground magazine by reaching out to Ted Wright at [twright@realtors.org](mailto: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 our annual fundraising golf tournament, providing funding for community events and needs including:
      - i. Salvation Army/Christmas for Kids
      - ii. Food Banks/Food Pantries
      - iii. Cancer fighters needs
      - iv. Various other community needs
    - b. We will research available NAR grants
    - c. We will research opportunities to be involved in community clean up events

### **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 several years of wins by the Association, and begin to educate first members, then consumers on all the Association has accomplished

- c. Focus on providing continued information about the value of our Association to members and the community we serve

#### **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 NDAR 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. Work with Jill Beck and research a business based re-assessment of our dues formula, including for affiliates, and have a real determination of financial needs and services provided from the Association to our members
3. Research the possibility of annually funding our incoming president to the NAR leadership summit held in Chicago annually every August
4. Position the member at the front of everything WBR does, with a clear focus on “what’s in it for me” (WiiFM)
5. Create specific and measureable goals on involvement, how many, why, and for what
6. Develop a clear and concise message from leadership to future leaders on the value of involvement and leadership within the Association
7. Start with **WHY** the Association is here:
  - a. Awareness
  - b. Improve members positions in the community
  - c. Help make members make more money
  - d. Sets members apart from non-REALTORS
  - e. Promote that WE are the real estate specialists
8. **HOW** do we do this:
  - a. Increase leadership and membership education
  - b. Focus on meaningful involvement, make it valuable
  - c. Seek to recreate committees or task forces
  - d. Increase Broker involvement
  - e. Introduce FUN events
  - f. Have a plan, answer WHY for everything
9. **WHO** has to do this:
  - a. President and AE have to lead
  - b. Board of directors and committee chairs have to implement

- c. Brokers need to buy in and help

**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 Above 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 NDAR**

- a. **We will provide new and continuing education classes on the Code of Ethics**
- b. **We will 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 will 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 will 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