

Strategic Plan Concept

(Suggestions based on minutes, conversations, plans and initiatives)

I. Consumer Outreach.....Engage consumers in real estate, economic and community issues

- a. Be the “Voice for Real Estate” in Berkshire County.
- b. Heighten community engagement through volunteer events and fundraisers
- c. Improve the consumer experience so there is greater perception of value of working with a professional and image in the community.

II. Member Services.....Provide resources that cultivate professionalism and empower excellence

- a. Offer relevant and compelling industry education, events and communications.
- b. Provide brokerages with access, knowledge and resources needed to thrive.
- c. Ensure critical REALTOR subjects are annually addressed: contracts, agency, fair housing, safety
- d. Effectively assess the technology needs of members’ actively selling real estate and develop ways to assist _____ members in meeting those needs.(all, the majority, active, those “doing the business”) who?

III. Advocacy & Issues Advocate for private property rights and real property ownership

- a. Be seen by the member, public, media, and elected officials as the leading advocate for private property rights and real property ownership.
- b. Work with all levels of the association to promote and advance our common interests.
- c. Create at least two ways we will work to get out the VOTE, create at least two ways we will work to encourage members to INVEST in RPAC/PAF and create at least two ways we will work to ACT on advocacy issues.

IV. Diversity, Equity, Inclusion, Fair Housing ... Promote equity/diversity in housing, leadership and membership.

- a. Ensure fair and inclusive engagement exists for all who seek within the association.
- b. Promote opportunities for a diverse membership.
- c. Examine barriers to housing in Berkshire County
- d. Educate agents and empower brokerages to address fair housing standards and compliance.

V. Strong GovernanceCreate a solid foundation of governance and enhance industry unity

- a. Maintain a solid foundation of governance that meets or exceed NAR Core Competency requirements.
- b. Ensure a strong, educated and informed leadership
- c. Administer the Professional Standards process with utmost care, professionalism and competency.
- d. Ensure data security for Association systems, as well as assist members in providing adequate security.

Strategic Plan Concept

(Suggestions based on minutes, conversations, plans and initiatives)

On the following page, you will see the suggested initiatives from page 1, with many ideas for possible goals to meet those objectives. These are also ideas that have been taken from the previous minutes and board conversation, as well as learning by staff at various industry meetings.

These are OPTIONS, but in no way do we have the resources to achieve all of these goals.

It is the Board's job to select those most relevant and important, allocate the needed resources, determine how we will measure success and set responsibilities.

All of this is simply a starting point to begin to craft the final plan. Each item is worthy of scrutiny, debate and discussion.

For reference, when the plan is finalized, below is a sample of what should be determined for each strategic initiative. Example:

I. **Consumer OutreachEngage consumers in real estate, economic and community issues**

a. Be the "Voice for Real Estate" in Berkshire County.

- *Draft monthly press release to share market statistics*
- *Share posts on social media that address broader real estate trends, local housing news, and their impact on consumers and/or community.*
- *Allocate time and training for research and story development for reporters*
- *Reexamine market data provided to the members, the public and governmental agencies to be more effective while better utilizing staff time*
- *Overhaul the AtHomeInTheBerkshires consumer facing website*

- Outcome: Be seen by the member, public, media, and elected officials as the leading advocate in Berkshire county for private property rights and real property ownership.
- Responsible Group(s): Staff, (new) Website Workgroup, Statistics Taskforce
- Resources Required (Staff Time / Money / Volunteers): 50-80 hours plus at least \$1,000 for technical support on website,
- Measurement of Success: Benchmark for sharing of market data should be established, a log of time spent assisting Realtors and members in the creation of data and housing quotes, stakeholder survey submitted.
- Status: Updated as the year goes on.

Strategic Plan, plus Operational Goal Ideas

I. **Consumer OutreachEngage consumers in real estate, economic and community issues**

- a. Be the “Voice for Real Estate” in Berkshire County.
 - *Draft monthly press release to share market statistics*
 - *Share posts on social media that address broader real estate trends, local housing news, and their impact on consumers and/or community.*
 - *Allocate time and training for research and story development for reporters*
 - *Reexamine market data provided to the members, the public and governmental agencies to be more effective while better utilizing staff time*
 - *Overhaul the AtHomeInTheBerkshires consumer facing website*
 - *Investigate ways the association can engage in community housing / zooming and economic discussions.*
 - *Host or p[articipate in a Homeshow or local housing event*
 - *Reexamine our Facebook presence (member side and public side) to gauge effectiveness of each/both.*
 - *Reexamine the ROI of other social media platforms*
 - *Integrate Down payment Resource into our consumer website*
- b. Heighten community engagement through volunteer events and fundraisers
 - *Make a positive impact in the community through volunteer service. (for Example: Habitat for Humanity Build day, Litter Cleanup, Soup Kitchen)*
 - *Promote the REALTOR Good Neighbor Program and Award, as well as the Berkshire Beautiful and Housing Hero awards.*
 - *Create branded “Donation totes” for clients moving, with list of non-profits accepting food and goods donations*
 - *The association’s program should involve a monetary donation to the award recipients chosen nonprofit organization and promoting award recipients achievements to the media and community Fundraiser*
 - *Investigate use of Placemaking Micro-Grant,*
 - *Host a public fundraiser with proceeds to a local non-profit*
 - *Apply for a MAR Housing Grant in honor of a local non-profit*
- c. Improve the consumer experience so there is greater perception of value of working with a professional and image in the community.
 - *Share NAR assets on social media.*
 - *Outsource a public relations campaign to promote the value of a REALTOR.*

II. Member Services.....Provide resources that cultivate professionalism and empower excellence

- a. Offer relevant and compelling industry education, events and communications.
 - *Diversify the frequency, location and type of communications.*
 - *Simplify the communication.*
 - *Track and survey to determine surge in CE virtual events, rather than in-person to prepare for transitions in the year ahead*
- b. Provide brokerages with access, knowledge and resources needed to thrive.
 - *Consider creating a compilation of sample office policies*
 - *Revive the brokerage office manual*
 - *Bring the DR Workgroup back together to create needed services*
- c. Ensure critical REALTOR subjects are annually addressed:
 - *Annually offer programs on contracts, agency, fair housing, safety*
- d. Effectively assess the technology needs of members' actively selling real estate and develop ways to assist _____ members in meeting those needs.(all, the majority, active, those "doing the business") who?

III. Advocacy & Issues Advocate for private property rights and real property ownership

- a. Be seen by the member, public, media, and elected officials as the leading advocate for private property rights and real property ownership.
 - *Investigate use of Commercial Innovation Grant, Housing Opportunity Grants, Smart Growth Grants,*
 - *Develop ways to strategically align or partner with local and regional decision makers invested in housing growth, projection, security, private rights protection.*
 - *Develop and maintain an email list of stakeholders to share market data, advocacy updates, On Common Ground magazines and data/reports received from NAR/MAR.*
- b. Work with all levels of the association to promote and advance our common interests.
 - *Promote Advocacy Week and MAR's Advocacy Day to the membership*
 - *Invite NAR and MAR legislative staff to our Government Affairs Meetings*
 - *Investigate / plan for ways MAR's local policy manager could assist in our efforts*
 - *Investigate NAR grants to help us*
- c. Create at least two ways we will work to get out the VOTE
 - *Create a resource for Realtors to give buyers information on registering to vote after home purchase*
 - *Share polling locations and registration deadlines for elections*
 - *Invite candidates to a housing meeting viewable by the membership*

- d. Create at least two ways we will work to encourage members to INVEST in RPAC/PAF
- *Exceed State RPAC/PAF member contributions and engagement goals*
 - *Reach out to major investors to secure commitment*
 - *Ask the major investor liaison to host an event to encourage more major contributors*
 - *Encourage Board members to at least step up to the Director Club (\$100) goal.*
 - *Promote RPAC in REcap/website and recognize major investors in REcap and at major events.*
- e. Create at least two ways we will work to ACT on advocacy issues.
- *Achieve better than average participation rates on state or national Calls-For-Action.*
 - *Annually encourage brokers to sign up for the broker Participation Program*
 - *Use social media to boost public advocacy engagement in legislative/political issues that impact homeownership, real estate investment and related issues.*
 - *Host a Housing Summit*

IV. Diversity, Equity, Inclusion, Fair Housing ... Promote equity/diversity in housing, leadership and membership.

- a. Ensure fair and inclusive engagement exists for all who seek within the association.
- *Discuss DEI at length with the nominating committee.*
 - *Reexamine current nominating and committee structure process to ensure it is inclusive and representative of our membership.*
 - *Incoming President should carefully review volunteer list, solicit skilled contributors and endeavor to keep an open and inclusive process with broad representation.*
 - *Conduct a survey to determine if any barriers exist within the current structure*
- b. Promote opportunities for a diverse membership.
- *Investigate use of Diversity Initiative Grants*
 - *Ensure membership process is inclusive and help brokers prepare for job fairs to share a career in real estate with a broader audience*
- c. Examine barriers to housing in Berkshire County
- *Create a Fairhaven challenge for members and leadership*
 - *Seek research data from NAR and MAR to understand local housing dynamics*
 - *Identify partnerships to promote solutions.*
- d. Educate agents and empower brokerages to address fair housing standards and compliance.
- *Create or find sample Brokerage office policies on fair housing standards*
 - *Provide resources to the brokerage community for training agents*

V. Strong GovernanceCreate a solid foundation of governance and enhance industry unity

- a. Maintain a solid foundation of governance and enhance industry unity to make us all stronger.
- b. Ensure a strong, educated and informed leadership
 - Leadership training must include legal liability, fiduciary duties, conflicts of interest and antitrust, awareness of the Core Standards requirements and understanding of the roles and responsibilities of staff and volunteer leaders as outlined in the President/Chief Staff Executive Checklist, at minimum.
 - Chief paid staff must attend at least six hours of REALTOR® association professional development
 - MLS Staff must attend at least six hours on MLS professional development
 - Reexamine budget process to use lessons learned in the past year to chart a future course for the board office and the members,
- c. Meet or exceed NAR Core Competency requirements.
 - Obtain annual certification of MLS Bylaws, regulations and policies
 - Maintain an Association Legal Counsel
 - Filing certification of Tax Returns and Annual Corporation documents
 - Approval of Annual Corporate Signatories
 - Board creation and approval of Strategic Plan
 - Conduct an annual performance reviews of chief paid staff, and must annually certify that a performance review for their chief paid staff has been conducted.
 - Maintain interactive website with professional standards and arbitration filing processes on the website; and includes links to the websites of the other levels of the association for promotion of member programs, products and services.
 - Maintain detailed financial policies
 - Conduct CPA annual audit, review or compilation
- d. Administer the Professional Standards process with utmost care, professionalism and competency.
 - Review the current processes to provide simple, easy to understand options for resolve all types of complaints.
 - Examine and consider implementing CODE RED (Rapid Ethics Delivery) program
 - Examine and consider implementing Citation Policy
 - Ensure all members have had adequate opportunity to attend the Code of Ethics mandatory training program
 - Track and notice all members and their brokers for failure to meet Coe of Ethics requirements no later than November 1st.
- e. Ensure data security for Association systems, as well as assist members in providing adequate security.



- Have all remote PCs confirmed for up-to-date virus, firewalls and remote access passwords
- Create technology budget for replacement of older technology
- Paper filing process conversion to electronic for protection of sensitive data.
- Ensure there is a solid and reputable option for members to electronically conduct business with local contract and forms.