

# **Oregon REALTORS®**

## **Strategic Plan**

### **Vision for 2015:**

Oregon REALTORS® will be: (a) the most credible and sought-after resource by members, policy makers, the media and the public on all issues related to the real estate industry, real property and land use and real estate business practices; (b) the sole content clearinghouse in Oregon for real estate education; and (c) a model for membership inclusivity.

### **Mission for 2009:**

Oregon REALTORS® provides exceptional resources, education, advocacy and legal tools to allow its members to practice real estate brokerage ethically, profitably and with manageable risk.

### **Marketing Tag Line:**

Your Real Estate Business Advocate!

### **Key Partners:**

Those groups, including members and staff, that determine the success of Oregon REALTORS® through decision making processes relating to the Strategic Plan are considered Key REALTOR® partners.

### **Constituents:**

Those groups that do not make decisions regarding the adoption or implementation of the Strategic Plan but whose ideas, perceptions and positions will be considered by the Key Partners are Constituents. Constituents include, but are not limited to, policy makers, service providers, the media and the public in general.

### **Declaration of Principles:**

#### **Internal:**

- (a) Oregon REALTORS® exhibit ethics and professionalism at every level.
- (b) Every Oregon REALTORS® staff member, Board member, and committee leader knows the desired results of their position.
- (c) Oregon REALTORS® service is recognized by our Key Partners and Constituents as immediate, respectful, thorough and efficient.
- (d) Oregon REALTORS® strive to communicate with “one voice.”
- (e) Oregon REALTORS® encourage free enterprise.
- (f) Oregon REALTORS® endorses the right to affordably own, fairly transfer and reasonably use private property.

## **External:**

- (a) Affiliates, vendors and suppliers endorse Oregon REALTORS® strategic direction.
- (b) Legislators come to Oregon REALTORS® for our strategic positions and view Oregon REALTORS® as an educational resource with reliable, accurate and current data and information.
- (c) The public views Oregon REALTOR® members as reliable and professional community contributors who provide exemplary service and accurate information with integrity and passion.

## **Definition of Member Participation:**

1. Member Participation is individualized participation beyond paying dues
2. Member Participation is tracked and measured by (including, but not limited to):
  - a. Responding to a survey;
  - b. Serving on an Ad Hoc work group;
  - c. Volunteering on (or contributing to) a public service project in which the Oregon REALTORS® is involved;
  - d. Participating in focus groups;
  - e. Attendance at Oregon REALTORS® meetings;
  - f. Participating in Oregon REALTORS®. sponsored education and training;
  - g. Responding to REALTORS® Calls to Action;
  - h. Voluntary contribution to RPAC.

## **Definition of Member Involvement:**

Member Involvement is more than responding to a phone call. Member Involvement is engagement in a work group, a task force, the Board of Directors, or other significant group that impacts the direction of the Oregon REALTORS®.

## **Definition of an Ad Hoc Committee:**

An Ad Hoc Committee is a Presidentially-appointed small group (five-nine people) that has a defined duration with a measurable product or result as its outcome. It is designed to serve as an outreach strategy to members who are not involved in the direction of the Oregon REALTORS® and to meet the outcomes of the strategic plan. Serving on multiple Ad Hoc groups is an ideal way for a member to volunteer their time while managing their careers.

## **Three Major Differences from Previous Strategic Plans:**

1. Moves from one-year to three-year desired outcomes;
  2. Establishes annual outcomes that move the Association closer to a three-year planned outcome;
  3. Renews and adjusts annually, moving forward the three-year desired outcomes.
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## 1. RESOURCES

Measurable Results December 2007 (Some processes begin in 2006, but the measurable results will start with 2007)	Measurable Results December 2009
<ul style="list-style-type: none"> <li>• Increase sponsorship revenue to not less than \$150,000.</li> <li>• Appoint Ad Hoc work group to study revenue structure including strategic implications of a 30-70 strategy and how to achieve revenue stability. Study implications of being less dependent on membership dues. Work group could include members from outside the REALTOR® organization.</li> </ul>	<p>Budget is a 30-70 allocation, with 30% of the budget coming from membership dues, 70% from non-dues revenue, with non-dues sources including grants, sponsorships, bequests, and special programs.</p>
	<p>Menu of additional services exists for members and non-members (for brokers, REALTORS® with less than five years experience, REALTORS® in second career, top-drawer producers, etc.).</p>
<p>Finalize purchase of new Headquarters building in Salem and prepare building for advanced communication tools -- i.e., video-conferencing (with necessary wiring, etc.).</p>	<p>Outfit new structure with video-conferencing and other advanced communications equipment to enable greater membership participation.</p>
<p>Ensure that staff salaries are competitive based on competitive positions in relevant (similar) markets.</p>	<p>Staff salaries continue to be competitive based on competitive positions in relevant (similar) markets.</p>
<p>Appoint an Ad Hoc work group to study pre- and post- licensing education requirements</p>	<p>Education generates \$250,000 in net non-dues revenue.</p>
<p>Provide real estate statistics to members and the public through ongoing partnership with Portland State University and the various MLS's operating throughout the state.</p>	<ul style="list-style-type: none"> <li>• Production of an annual "white paper" on trends in the Northwest based upon information generated through partnership with Portland State University.</li> <li>• Be the primary provider of Real Estate statistics statewide.</li> </ul>
<p>83% of active licensees are REALTOR® members (percentage as of 6/06 is 81%).</p>	<p>95% of active licensees are REALTOR® members.</p>
<p>Benchmark current REALTOR® membership retention rates.</p>	<p>99% of members with active real estate licenses remain REALTORS®.</p>

Benchmark current member participation rates.	<ul style="list-style-type: none"> <li>• Between 2007-2009, 5% of membership will have served on Ad Hoc committees.</li> <li>• 10% of membership participate in some way (as “participation” is defined above)</li> <li>• 20% of our members participate in humanitarian causes like Habitat for Humanity, etc. This is ancillary advertising for our members in their local communities.</li> </ul>
Continue annual focus groups and provide an avenue for other communication programs so that important issues can rise to strategic levels	Yearly focus groups in various parts of the state with the goal of speaking to new groups yearly
Develop a survey to track information on member demographics.	Makeup of committees should reflect the demographics of the membership.
A non-profit foundation is established to receive gifts and bequests.	.
Update the Integrated Communications Plan and expand the plan to include an active public relations campaign.	Implement a state campaign focusing on Oregon REALTORS® that is a tag-on with NAR national PR campaigns.
<p>Benchmark current levels of participation in international real estate:</p> <ul style="list-style-type: none"> <li>• Business activities</li> <li>• Association activities</li> <li>• Multi-lingual membership</li> </ul> <p>Evaluate existing community demographics</p>	<ul style="list-style-type: none"> <li>• 5% of membership participate<sup>1</sup> in international real estate programs and/or take advantage of resources provided through our International Business Council.</li> <li>• Look at the internal benefit to people living in Oregon who are agents with ethnic backgrounds and clients with multicultural/multilingual backgrounds</li> <li>• Develop programs to involve different multilingual/multicultural leadership into our organization</li> </ul>
<ul style="list-style-type: none"> <li>• Support the Ambassador Association program, including planning and implementing a trade mission to Vietnam.</li> <li>• Coordinate and support an Oregon booth at the 2007 MIPIM expo.</li> </ul>	Promote REALTOR® members within the larger international business community in Oregon.
	Begin conversations with PMAR and RMLS to look at shared facilities/resources – perhaps look at a Real Estate Center.

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<sup>1</sup> “International real estate” is defined as any aspect of a transaction that has an international component to it including when a transaction involves buyers or sellers who are US citizens but still heavily influenced by a foreign culture. It is understood that the bulk of international business done by members is done locally.

**BRAND IDENTITY – i.e., a vehicle for integrating all the departments into an umbrella goal—  
This is essentially how we want to be viewed in the world**

<p>Identify member and non-member needs in the following area(s):</p> <ul style="list-style-type: none"> <li>• Risk management tools</li> <li>• Business tools and resources (including New Markets: minorities, seniors, “next generation”)</li> <li>• Technology trends</li> <li>• Consumer trends</li> <li>• International/multicultural trends</li> <li>• Education</li> </ul>	<ul style="list-style-type: none"> <li>• Resources are identified by our members as an Oregon REALTORS® product. Member needs are met as they relate to business tools and resources – Oregon REALTORS® is indispensable to member’s business success as defined by survey results.</li> <li>• We package our services and provide consultation services to other associations; we sell products and services to other associations as appropriate.</li> <li>• 24/7 information and fulfillment of member expectations (in at least 2 languages).</li> <li>• Strategic partnership with several MLS’s for education and risk management tools.</li> </ul>
<p>Benchmark current percentage of membership with knowledge of what the Association does. For those survey results for “key” questions under a “9”, a select number will be focused on to increase to a “9” which will be shown in new survey.</p>	<p>Survey results continue to rise every year; responses to all “key” questions are “9” or better.</p>
<p>Implement new marketing and promotion programs that fill deficiencies in the member survey. Look at programs that inform the public. Potential programs include: (a) co-branding education, (b) participation in real estate ads magazine, (c) publication of member profile magazine, (d) participation in public awareness program (i.e., ‘the crack house’ in Salem,) (e) promotion of HOME Foundation and/or American Home week.</p>	<p>10 new marketing and promotion programs in place since 2006.</p>
<ul style="list-style-type: none"> <li>• Increase in participation by diverse members who choose to be involved, especially at the Ad Hoc committee level (no quotas.)</li> <li>• Benchmark current participation rates based on member demographics.</li> </ul>	<ul style="list-style-type: none"> <li>• Our leadership reflects our membership’s diversity.</li> <li>• Develop strategies to target for REALTOR® membership those underrepresented groups</li> </ul>
<p>Promote the mission and objectives of the HOME Foundation while targeting local jurisdictions to adopt community housing measures. HOME Foundation can operate as an Ad Hoc committee to look at housing opportunities in every community in the state.</p>	<p>Have measurable influence in increasing housing opportunities in Oregon: provide a housing advocacy program tool/template to every local association and ensure all local associations will have participated in a Habitat</p>

	continued... House or a refurbished crack house project or other housing opportunity program.
<ul style="list-style-type: none"> <li>• Appoint an Ad Hoc work group to define desired NAR outcomes -- what outcomes do Oregon REALTORS® really want from NAR and what is the best way to achieve the outcomes?</li> <li>• Appoint an Ad Hoc work group to study the database management issue and make recommendations (an example is the need to identify 100 members who are active in their local community.)</li> <li>• NAR Directors take recommendations to NAR on database requirements</li> </ul>	<p>Desired NAR outcomes are clearly defined and strategies are implemented to achieve those outcomes</p> <ul style="list-style-type: none"> <li>• Systems and methodologies exist that allow Oregon REALTORS® to research and understand individual member's needs and profiles</li> <li>• Create a data-base management system that tracks member needs/interests/involvement</li> </ul>

## 2. EDUCATION and PROFESSIONAL DEVELOPMENT

<b>Measurable Results December 2007 (Some processes begin in 2006, but the measurable results will start with 2007)</b>	<b>Measurable Results December 2009</b>
<p>Education is our business. Oregon REALTORS® will concentrate on core services such as designations and distance education and, secondarily, expand education into a significant source of non-dues revenue, including pursuit of national and international markets and possible use of dues dollars to help market and promote education.</p>	<ul style="list-style-type: none"> <li>• Working with the Real Estate Agency, all current pre- and post- licensing education is re-worked to increase professionalism. Pre-licensing education will move away from the simple passing of the test to the operation of the real estate business.</li> <li>• Other REALTOR® designations are added</li> <li>• Oregon REALTORS® lead the market in developing timely and cutting edge programs <u>before</u> the competition.</li> <li>• Oregon REALTORS® control content for pre-licensing education for license to schools statewide.</li> <li>• Oregon REALTORS® is the principal resource for post-licensing certification of educational programs and providers resulting in uniformity in Broker education.</li> <li>• By 2009, a process has been developed in certifying course instructors and content.</li> </ul>

	<ul style="list-style-type: none"> <li>• Be instrumental in instituting real estate degree standards in conjunction with Portland State University and other Oregon universities.</li> <li>• Develop strategic partnerships with post-secondary institutions to initiate curriculum discussions and explore opportunities for providing input on to pre- and post- licensing education</li> </ul>
Maintain and promote a speakers bureau.	Certify a list of qualified speakers available for educating and training members
<ul style="list-style-type: none"> <li>• Continue to develop and present a variety of educational programs through live seminars, “webinars,” self-study, internet-based courses, certifications and designations, including GRI.</li> <li>• Benchmark membership for REALTORS® designations.</li> </ul>	<ul style="list-style-type: none"> <li>• Not less than 5,000 members attend at least one class sponsored by Oregon REALTORS®</li> <li>• Not less than 35% of membership have earned a REALTOR® family designation or certification.</li> </ul>
35 applications for Oregon Leadership Institute Northwest classes.	There is a waiting list for Leadership Institute Northwest classes. All grads will have leadership roles within Oregon REALTORS®.
Plan and execute 2007 Business Summit with focus on principal brokers and broker-owners.	Create a state-wide forum for principal brokers and broker-owners .

### 3. ADVOCACY

Measurable Results December 2007 (Some processes begin in 2006, but the measurable results will start with 2007)	Measurable Results December 2009
Real Estate Agency is restructured into a true commission by the Legislature with a resulting policy-making Real Estate Board comprised of seven REALTORS® and two public members appointed by the Governor.	
Take appropriate advocacy action on legislation and regulations impacting the real estate industry.	No legislation or regulation affecting real estate is enacted without Oregon REALTORS® participation.
Plan and conduct a Government Affairs Director Conference; develop and implement an outreach and educational program for local/shared Government Affairs Directors (GADs).	Have in place and adequately funded local and shared Government Affairs Directors (GADs) in every appropriate local region/association.

Maintain a key constituent program for each state legislator; educate and encourage key constituents and members regarding effectively lobbying their State representative or Senator.	Have an average of not less than 35% response to Oregon REALTORS® Calls to Action. Have 35% of members registered for the program.
Plan, promote and conduct a REALTOR® Day at the Capitol for 300 participants, including a social reception open to all members, legislators and other government officials.	Have not less than 500 members in attendance at 2009 REALTOR® Day at the Capitol.
Create a media development program to promote legislative and regulatory advocacy efforts.	Have a well established media program ensuring that the media views Oregon REALTORS® as the “go to” resource on all real estate industry and land use issues.
Encourage use of Issues Mobilization Funds for activities on issues impacting the real estate industry and/or private property rights.	Have established Local Issues Mobilization Funds in not less than eight local boards around the state.
Conduct diverse RPAC fundraising activities to increase awareness of the importance of PAC participation and to increase PAC giving to not less than 40% (currently 33%) of membership.	No less than 50% of Oregon REALTOR® members contribute to RPAC.
Promote the mission and objectives of the HOME foundation	<ul style="list-style-type: none"> <li>• Work toward voluntary inclusionary zoning.</li> <li>• Establish a legislative agenda to require that all real estate client trust accounts be interest bearing.</li> </ul>

#### 4. LEGAL

<b>Measurable Results December 2007 (Some processes begin in 2006, but the measurable results will start with 2007)</b>	<b>Measurable Results December 2009</b>
Real Estate Agency is restructured into a true commission by the Legislature with a resulting policy-making Real Estate Board comprised of seven REALTORS® and two public members appointed by the Governor.	Oregon REALTORS®. has conducted a comprehensive review of the Oregon Real Estate Blue Book and all statutes and rules impacting the real estate industry and made recommendations for improvement to the Real Estate Agency Board
Complete review/analysis of governance structure and appropriate structural proposal submitted to the Board of Directors. That proposal may include regionalizing the	A governance structure is in place that increases member involvement and provides for efficient decision-making.

continued. . . membership and have elected district representatives and a delegate body.	
Provide training to local board AE's regarding working successfully with their Boards of Directors, leadership training, human resources, PACs, etc.	Provide education to leadership and local associations on strategic planning, running committees, Board of Director training in the communities, PACs, director training and diversity and available existing services. This is a service to our members in helping them make a difference in their community that will directly benefit the community and ultimately Oregon REALTORS®.
Implement a training program for each year's new KOG/committee members and state Directors. Examine/evaluate new technology (webcasts/podcasts), including online learning. Develop a process for recruiting members to participate in KOGs, standing committees, task forces and working groups and train members on how to be a member or leader of a KOG or committee	A responsible committee process has been designed and all those who serve are trained.
Assist with appropriate advocacy action on legislation and regulations impacting the real estate industry.	No legislation or regulation affecting real estate is enacted without Oregon REALTORS® participation.
Encourage use of Legal Action Funds for activities on issues impacting the real estate industry and/or private property rights.	Have established Legal Action Funds in not less than five local boards around the state.
Identify member needs for, and develop, <ul style="list-style-type: none"> <li>• Risk management tools</li> <li>• Business tools/resources</li> </ul>	In strategic partnerships, deliver a comprehensive and up-to-date risk management and business tool kit which is available to members in at least two languages and is available for sale to other associations as appropriate