



OREGON  
ASSOCIATION  
OF REALTORS®

# 2013 – 2015 STRATEGIC PLAN

Updated by Committee: June 17, 2013

## Executive Summary

Following (1) an external scan of the forces and trends affecting the real estate industry and the REALTOR® organization and (2) an analysis of the Strengths, Weaknesses, Opportunities and Threats surrounding the Oregon Association of REALTORS® (OAR), the 2013 Strategic Planning Committee (the 2013 Committee) reached the following conclusions and recommendations:

The Oregon Association of REALTORS® exists to provide successful outcomes in these key areas:

1. Advocacy
2. Being a trusted, credible source of valuable, relevant information
3. Risk Management for members

Success in these three areas requires a healthy support system, or “infrastructure,” which includes such factors and considerations as:

- A stable level of membership
- An appropriate and sustainable dues structure
- A bricks and mortar location for doing business
- Appropriate staffing levels and competencies
- An effective technology infrastructure (database management system, website, etc)
- Effective communication vehicles and strategies
- Effective marketing capabilities
- A data gathering capability that allows the organization to make decisions based on accurate, timely data

Accordingly, in addition to regularly developing and implementing strategic outcomes in each of the 3

Key Areas above, OAR must continually review and plan for a strong and healthy Infrastructure.

To maximize the chances of achieving the ambitious goals set forth in this Strategic Plan, the Committee notes that:

- The OAR Strategic Plan should be based on a 3-year time horizon, and
- Should include 1-3 clear, measurable outcomes in each of the three Key Areas, as well as with respect to Infrastructure.
- Then, after the Plan is approved, the organization should allocate sufficient resources to ensure that the desired outcomes are achieved; and
- Should make those outcomes part of the annual operational plan, and
- Must have in place a process to monitor progress toward achieving the outcomes, and to re- allocate resources as necessary.

**UPDATE:** The 2014 Strategic Planning Committee (2014 Committee) met and reviewed the current three-year plan. They also discussed the forces and trends affecting the real estate

industry and the REALTOR® organization and (2) an analysis of the Strengths, Weaknesses, Opportunities and Threats surrounding the Oregon Association of REALTORS® (OAR) – as identified by current data. Following lengthy discussion, the Committee makes the following modifications/updates to the 2013-15 OAR STRATEGIC PLAN.

## 2013 – 2015 STRATEGIC PLAN FOR THE OREGON ASSOCIATION OF REALTORS®

**Vision:** Oregon REALTORS® is the most credible and proactive resource for members, policy-makers, the media and the public on issues related to the real estate industry in Oregon.

**Mission:** Oregon REALTORS® develops, fosters and provides quality Resources, Education, Advocacy and Legal services for the benefit of our REALTOR® members.

**Purpose:** We are Advocates! The Oregon Association of REALTORS® protects and promotes our profession and private property rights by providing Resources, Education, Advocacy, and Legal support as the voice of real estate in Oregon.

### ADVOCACY

#### 1. The Post-Ballot Measure 79 World

OAR needs to continue to build on the success of Ballot Measure 79. Victory has provided an opportunity for OAR to advance its efforts to connect to its own membership, as well as advance other public policy goals. Therefore,

- By November 30, 2013 the Governmental Affairs Key Committee will communicate 2013 legislative successes and threats to the membership.
- Identify and prioritize legislative issues for 2014.

#### 2. Strengthen our RPAC-investor culture

Long-term advocacy success, and OAR's ability to be the primary advocate for private property rights in Oregon, depends on a strong RPAC, to help educate and elect candidates to strengthen support for Home Ownership and the protection of Private Property Rights. However, while most things in the political world are best accomplished at the most local level, true culture change is most effective when planted and nurtured at the highest levels of the organization. As such, for OAR to develop a culture of RPAC investment, the OAR Leadership Team (Executive Committee) and

Board of Directors will continue to commit to the new culture the Directors must also obtain the same commitment from their respective local associations and members. Therefore,

- By the end of 2014, OAR will be an RPAC-investor culture, beginning with elected Leadership. Using 2011 statistics as a benchmark, success will be measured by pre-determined percentage increases in appropriate metrics, including but not limited to:
  - Percentage increase in total dollars invested

- Increase in the total number of investors
  - Increase in the participation rate among the general membership
  - Increase in the participation rate among the OAR leadership
  - Increases in the number of major investors (Sterling, Crystal and Golden R's; President's Circle)
- OAR will also strengthen the REALTOR® Party concept so that the idea of supporting candidates who are friendly to REALTOR® issues, regardless of party affiliation, is a widely understood and accepted fact of life within OAR. Success can be measured by, among other means, benchmarking member knowledge of and attitudes toward the REALTOR® Party concept in 2012, and tracking improvement through 2013 and 2014 through surveys.
  - In order to further build on the commitment and importance of RPAC, OAR will take every opportunity to recognize and thank Oregon REALTORS® who have made the commitment to invest in their profession and RPAC.

### 3. Building and Enhancing Coalitions

Opportunities exist to partner with groups not traditionally associated with core real estate issues, or with groups that are not always viewed as allies of the real estate industry. To exploit those opportunities and leverage OAR's resources, OAR staff, the Governmental Affairs Committee, and other committees as appropriate shall strengthen existing coalitions and identify where new ones should be explored.

## TRUSTED, CREDIBLE SOURCE OF VALUABLE, RELEVANT INFORMATION

### 1. Communication

The goal is not necessarily communication... but engagement. As such, in order to identify and demonstrate the relevance and value of OAR – and the REALTOR® family overall – we will:

- Website – the newly developed website will become the central focus of OAR being seen as a Trusted, Credible Source of Valuable, Relevant Information.
- The primary focus of OAR communication efforts will always be the member! However, the goal is to ensure Oregon REALTORS® are fully informed on the issues important to them.
- As such, in addition to directly communicating with the member, OAR will also build partnerships with:
  - Local Associations – OAR will also coordinate with all local associations and provide them with information they can use and disseminate about the value and relevancy of the REALTOR® brand.

- MLS – OAR will also coordinate with the various Multiple Listing Services in Oregon and provide them with information they can use and disseminate through their channels.
- Principal Brokers – OAR will continue to work on identifying Principal Brokers and providing them with information they can share with their Brokers.

## 2. Education

With the understanding of the value education brings to the REALTOR® family, the OAR Professional Development Key Committee will develop an Education Business Plan to support the Strategic Plan in time to be presented to the Board of Directors at the Fall Governance Meeting 2014.

## RISK MANAGEMENT

- By Spring 2014, establish a forum of the Business Issues Key Committee for Managing Principal Brokers/Owners, which will meet quarterly, at a minimum via conference call, to discuss overall industry issues and risk management guidance and practices.
- Beginning with the first edition of the 2014 ORENJ, OAR will create an executive summary of relevant real estate agency disciplinary actions to be distributed to the full OAR membership.

## INFRASTRUCTURE

All factors grouped under the heading of “Infrastructure” should continually be monitored and adjusted as necessary as part of general operations. Strategically, the Committee makes the following specific recommendations:

### 1. Leadership

To ensure that future generations of REALTORS® continue to enjoy the benefits of capable, motivated and committed volunteer leadership, OAR needs a steady influx of new leaders, from backgrounds that to the extent possible reflect our membership and our communities. The Committee recommends that OAR take advantage of the newly introduced REALTOR® Leadership Program available from NAR. Accordingly:

- By January 1, 2015, OAR will have a deep pool of 200-300 trained potential leaders who will have gone through the RLP program.
  - Offer 3 sessions of L200 and L300 each year (35 maximum participants in each)
  - Local associations, working with DVPs, are responsible for finding RLP

- participants.
- Local associations will be encouraged to find participants reflecting the gender, ethnic, and generational diversity of OAR.

## 2. Data Gathering

To the extent possible, OAR should make decisions based on accurate, timely and relevant data. Data should be obtained about both OAR's membership and its needs, and the external environment affecting our industry and communities. Accordingly, OAR will begin in 2014 to utilize smaller, issue specific research projects on a regular basis