



# Strategic Framework and Plan: 2017-2018

As adopted by the  
Northeast OK Board of REALTORS®  
Board of Directors  
December 14, 2016  
NAR Approved December 19, 2016

---

---

## Definition of Terms

**Mission:** a statement of the organization's core purpose and indispensable value for those it serves.

**Vision:** a description of the organization in a future state, operating at a level of performance required to fulfill its mission

**Operating Values:** principles that guide action, decision and behavior within an organization. External values describe what the organization stands for. Internal values describe how the organization conducts business and how individuals and groups within the organization work together.

**Success Indicators:** Those indicators of accomplishment; a way to benchmark association progress toward strategic objectives

**Core REALTOR® Association Functions and Focus:**

1. Creating and Delivering Value to Members through Education and Member Services
2. Advocacy and Influence
3. Communication and Outreach
4. Governance and Operations

Within each Core Function certain strategic goals must be addressed, changed, or added to as appropriate. These should be discussed in the current planning cycle. Specific strategies and actions taken in these areas will move the organization forward in achieving its vision. Each of these Projects should have:

- a) Project Name or title
- b) Strategy(ies)
- c) Tactics/Action Plans
- d) Success Indicators (Benchmarking)
- e) Responsible Party or Parties

---

---

## NEOBR Strategic Framework

### NEOBR Mission

The mission of the Northeast OK Board of REALTORS® is to provide leadership, education, technology and support for members, to promote the REALTORS® image and ethical business practices and to elevate our membership to better serve the consumer, support our communities, and protect private property rights.

### NEOBR Operating Values

#### **Teamwork**

Participation

#### **Integrity**

Compassion/ High level of customer service to consumers

Member-driven

Transparency

Decisiveness

### Goals

Goal 1. Member Value & Involvement

Goal 2. Advocacy

Goal 3. Community & Consumer Outreach

Goal 4: Professionalism

Goal 5: Infrastructure & Future Leadership

---

---

## **Goal #1. Member Value & Involvement**

### **Objectives**

The Northeast OK Board of REALTORS® members will see the value that they receive for their dues dollars and involvement.

### **Strategies:**

1. Deliver value to members through high quality, relevant education
2. Leverage technology
3. Communication: effectively keep the membership “in-the-know” on what the board is doing and offering

### **Tactics:**

- A. Consider offering tech-fair or other technology related training
- B. Continue to offer 1-hour CE classes, some during membership meetings
- C. Explore possibility of offering classes via DVD (OAR's Education Share Program) through various broker offices throughout the board's jurisdiction
- D. Explore offering online education through education/revenue share program
- E. MLS training
- F. Offer relevant, timely education on things that will impact members' businesses
- G. Survey members on how they best like to receive information
- H. Send emails to membership
- I. Maintain website that satisfies NAR core standards
- J. Utilize Social Media such as Facebook
  - a. Create Facebook group for Northeast Board that has public service articles
- K. Utilize message boards and keep them current
- L. Consider emailing a regular message from the President to members 2x/year
- M. Better promotion of association events and opportunities

### **Success Indicators:**

- A more educated membership with tools to build a successful business
- Increased participation at meetings/luncheons/events
- Members will support the membership dues level that is needed to continue valuable services
- Increased interest in serving in leadership roles
- Broker/Owners will meet 2x/year to get updated and improve communication, and will promote board participation and volunteerism
- A better-informed membership
- Increase in number of members attending state and national events

### **Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

---

---

## **Goal #2. Advocacy**

The Northeast OK Board of REALTORS® will be seen by the public, media, and elected officials as the leading advocate for private property rights and real property ownership.

### **Objective 1**

Raise 100% of the established RPAC Fundraising goal.

#### **Strategies:**

1. Membership promotion of the value of RPAC
2. Planned fundraising activities

#### **Tactics:**

- A. Include a recommended RPAC Investment “above the line” on the annual dues bill that is reflects the amount of the “fair share” goal
- B. Encourage Board of Directors, Committee Chairs and Managing Brokers to lead by example and contribute above the fair share level and thank those members with notes, announcements and recognition
- C. Mention/promote RPAC at every membership meeting and educational event
- D. Develop an annual fundraising plan (e.g., 50/50 drawings, raffles, auctions, events within the guidelines of State laws)
- E. Recognize 99 Club members by “ringing the bell” and promoting on the MLS message board
- F. Make personal outreach visits to the offices
- G. Plan an RPAC Phone Bank to compliment the RPAC fundraising campaign.

#### **Success Indicators:**

- Increase in RPAC participation
- Increase in recognition within the community of REALTOR® political involvement
- More Golden Rs
- More Presidents Circle members
- More \$99 Club members
- More Sterling Rs
- Increase total dollars raised

#### **Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

### **Objective 2**

Achieve participation rates on NAR and State Calls for Action that are better than the average participation rates.

#### **Strategies:**

1. Encourage activation of Broker Involvement Program
2. Encourage member use of REALTOR® Action Center app and website

---

---

**Tactics:**

- A. Promote members to download/use the Realtor® Action Center App at every meeting and educational event
- B. Request every Board member and other influential members to promote the Calls for Action on their social media sites
- C. Promote brokers to sign up for the Broker Involvement Program so agents get the calls for action directly from their broker
- D. Use association communication vehicles to promote agents to respond to Calls for Action

**Success Indicators:**

- Increase in broker “forwards” of NAR Calls for Action
- Growth in member response to Calls for Action
- Broker/Owners promote opportunity to use the “REALTOR® Voice”
- A better-informed membership

**Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

**Objective 3**

Support property rights, housing, and real property ownership by providing active campaign assistance for local political candidates that are friendly to Realtor® Party issues.

**Strategies:**

1. High visibility in local election outcomes
2. “Get out the vote” among REALTORS®

**Tactics:**

- A. Encourage participation in the State and the National lobbying days
- B. Encourage participation in the State Legislative Representative Program
- C. Encourage members to register to vote
  - a. Include importance of registering in new-member orientation
- D. Encourage members to vote

**Success Indicators:**

- Increase in NEOBR members who attend state REALTOR® lobbying events
- Recognition among local officials that NEOBR is influential in political decision-making
- Candidates who are REALTOR®-friendly and support private property rights are elected
- A more-involved membership, particularly in voting turnout and support of REALTOR®-friendly candidates
- Number of members serving in elected positions

**Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

---

---

### **Goal # 3. Community & Consumer Outreach**

#### **Objective 1**

Be the “Voice for Real Estate” in Northeast OK, promoting market statistics and real estate trends and issues and their impact on consumers.

#### **Strategies:**

1. Active media outreach program
2. Use electronic communications and social media to educate members and consumers

#### **Tactics:**

- A. Highlight local, state or national real estate data monthly in a news release or through direct outreach to local reporters (e.g., release MLS or local market statistics, Realtor® Property Resource data, NAR research reports, local/state analysis of NAR statistics, etc.) through press releases, interviews, etc.
  - a. Send to local chambers of commerce
  - b. Send to public officials
  - c. Post on website
  - d. Explore options to filter stats for better accuracy
- B. Arrange interviews with association leadership to provide context to local real estate data or issues. Use NAR’s media talking points to help prepare leaders for their interviews.
  - a. Submit to *The Real Estate Book*, *Welcome Home Grand Lake*, and similar publications
- C. Explore embedding the free Real Estate Today radio audio player to association website so consumers can hear the show digitally each week
- D. Explore adding the free REALTOR® Content Resource widget to association website to stream original homeownership content from HouseLogic.com

#### **Success Indicators:**

- Increase in media placements
- Increase in traffic to NEOBR website
- Outside requests for information increase

#### **Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

#### **Objective 2**

Enhance community involvement to create a favorable image of REALTORS® and to promote the value proposition of using a REALTOR®.

#### **Strategies:**

1. Active media campaign, using internal and external resources
2. Use NAR resources to reach out to area homeowners

---

---

**Tactics:**

- A. Explore including a digital ad banner from NAR's Consumer Advertising Campaign on association's website
- B. Reach out to reporters to suggest stories that demonstrate members' value to home buyers and sellers, small business owners, retailers and other commercial businesses
  - a. Send to HOAs for newsletters and social media (Facebook page)
  - b. Submit to *The Real Estate Book*, *Welcome Home Grand Lake*, and similar publications
- C. Reach out to local newspapers or websites and offer free content for a regular real-estate related guest column
- D. Explore the possibility of an advertising plan that would address the uniqueness of properties in this area and the importance of using a REALTOR® with knowledge of the area to protect consumer interests
- E. Consider customizing the Oklahoma Infographic for the local area and distribute to news outlets

**Success Indicators:**

- Increase in media placements
- Increase in visibility of NEOBR among community officials
- Increase in traffic to NEOBR website

**Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

**Objective 3**

Boost consumer advocacy efforts and engage the public in legislative/political issues that impact homeownership, real estate investment and related issues.

**Strategies:**

1. Heighten awareness of issues that impact property owners
2. Ensure awareness among local public officials of the importance of homeownership to the local economy

**Tactics:**

- A. Explore applying for an NAR Issues Mobilization grant for GRDA Amendment related to the FERC "Rule Curve"
- B. Submit an op-ed or letter to the editor of the local newspaper addressing the issue at hand (Example topics: water levels; fiber-optic internet, etc.)
- C. Mobilize members to ask their clients and customers to contact their local representatives about an issue
- D. Consider implementing NAR's Water Infrastructure Toolkit

**Success Indicators:**

- Increase in media placements
- Increase in visibility of NEOBR among community officials
- Increase in traffic to NEOBR website
- Enhanced local official knowledge and awareness of real estate issues



---

---

**Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

**Objective 4**

Heighten community investment through organizing human resources and fundraising for the benefit of local charitable/community organizations.

**Strategies:**

1. Charitable activities and fundraisers
2. Use REALTOR® Party grant program for community project

**Tactics:**

- A. Explore the opportunity for an NAR Housing Opportunity grant for homebuyer education
  - a. Explore partnerships with other related entities, such as lenders, inspectors, etc.
- B. Explore the possibility of applying for a REALTOR® Party Community Outreach grant for a Better Block or Placemaking project
  - a. Consider partnering with other organizations (Ex: humane society, tourism association, The Y, etc.)
- C. Encourage local leadership and membership to be involved in another community organization and promote that to REALTORS®
  - a. Examples: Habitat for Humanity, food banks, therapy horses for disabled kids, camp for kids
  - b. Consider asking each REALTOR® member to give \$1 for an organization such as backpacks for kids
  - c. Survey members asking what other organizations they serve and ask them to consider participating on behalf of the REALTORS®

**Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Board Committees, Action Groups, Task Forces

---

---

## **Goal 4: Professionalism**

### **Objective**

Members are ethical, professional and adhere to the NAR Code of Ethics.

### **Strategies:**

1. Educate members on the NAR Code of Ethics
2. Offer professional standards administration and services

### **Tactics:**

1. Offer NAR Code of Ethics course
2. Continue to participate in the statewide Professional Standards program

### **Success Indicators:**

- Members are ethical and abide by the NAR Code of Ethics
- REALTORS® are known throughout the community as having integrity and professionalism
- Code of Ethics complaints are handled legally, professionally and fairly

### **Lead Body, Entity or Individuals Responsible for progress:**

- Staff
- Leadership
- Professional Standards Committees

---

---

## **Goal 5: Infrastructure & Future Leadership**

### **Objective**

NEOBR operates within sound financial practices and policies, providing tangible, value-added products and services that are embraced by members.

### **Strategies:**

1. Ongoing use of association financial best management practices
2. Member services that provide non-dues revenue (i.e. lockbox/keybox service)

### **Tactics:**

1. Annual financial report by CPA and sound financial management practices in place
  - a. Annual Review with annual report given to the board and membership
  - b. Review CPA every three years and change as needed to help keep a fresh view on the financial status of the Board
  - c. Have Board's Secretary/Treasurer present CPA's annual report to Board of Directors annually to show the board is transparent
  - d. Ensure that financial policies fulfill NAR requirements
2. Review shared service possibilities to decrease financial strain and utilize staff for more targeted projects (i.e. shared services with Professional Standards, Education, Govt. Affairs)
3. Conduct annual governance documents (bylaws, policies) review with an eye toward areas of potential improvement
4. Continue to improve MLS service
  - a. MLS Training
  - b. Communication about the MLS and its capabilities
  - c. Better board office support for MLS questions
  - d. Evaluate MLS system for potential improvements
  - e. Ensure that rules are enforced consistently
5. Review best practices for meetings
  - a. Evaluate best meeting locations, structure, frequency
6. Evaluate committee structure
  - a. Recognize volunteers
  - b. Expand some committees' scope as needed (Ex: Public Relations Committee)
  - c. Streamline committees where feasible
  - d. Consider offering more diverse opportunities to serve, such as limited-scope action teams and task forces
  - e. Take advantage of GoToMeeting and other online solutions for meetings to include more people in the large jurisdictional area the board covers
  - f. Need formalized committee processes, job descriptions, time est., etc.

### **Success Indicators:**

- Solid financial review
- Policies and procedures set that protect the organization and fulfill NAR's requirements

### **Lead Body, Entity or Individual Responsible for progress:**

- Leadership
- Staff
- Board Committees, Action Groups, Task Forces