

Approved 2016 Strategic Plan - FINAL

Area #1: Professional Development

Purpose: PCBR provides educational opportunities to its members to elevate their professionalism.

- I. Goal: PCBR provides exceptional curriculum for professional development.
 - a. Strategies:
 - i. PCBR provides new and continuing member code of ethics training.
 - ii. PCBR offers NAR designation courses, advanced skill classes, technology and business training, and new member orientation.
 - iii. PCBR to provide highest quality of instructors, including in-state, regional and national experts
 - iv. Classes are based on member demand identified through annual survey and member feedback.
- II. Goal: PCBR provides community and industry specific speakers at events
- III. Goal: PCBR provides an interactive website to enhance member access to professional development information.*

Area #2: Communications & Marketing

Purpose: PCBR communicates the value of a REALTOR® & accurate industry information to its members internally & externally.

- I. Goal: Through various communication venues, PCBR communicates relevant, timely & accurate statistics, industry information and advocacy information to its members
 - a. Strategies:
 - i. Advocacy (evangelizing RPAC) communications to the members the value of participating in RPAC fund raising.*
 - ii. Code of Ethics *
 1. Communicate to our new & existing members that we are providing training classes and continuing education classes
 2. Communicating that the State association is the clearing house for grievances, mediation, arbitration & member services.
 - iii. Promote to our members the importance of participating in any NAR Calls for Action to assess member understanding of

Approved 2016 Strategic Plan - FINAL

- the overall value provided by associations at all 3 levels of the REALTOR® Organization
 - iv. Provide local market information to the members
 - II. Goal: PCBR informs the public with accurate, reliable & valuable real estate industry information and reinforces the importance of hiring a Park City Board REALTOR® for their real estate transactions.
 - a. Strategies:
 - i. Consumer outreach
 - 1. Promote market stats, real estate trends & issues.
 - 2. Promote the value proposition of using a Park City Board REALTOR® and engage in community activities which enhance the image of the Park City REALTOR®
 - 3. Advocacy Efforts- Inform & engage the public in legislative/political issues that impact real estate & related issues.
 - 4. Community Investment- Inform the public of our philanthropic efforts for the benefit of charitable/community organizations within the Board's territory.
- III. Goal: PCBR utilizes effective mechanisms to convey overall market conditions & the advantages of using a Park City REALTOR®.
 - a. Strategies:
 - i. Technology*
 - ii. Interactive website: email blasts to members promoting member programs, products & services*
 - iii. Member access to professional standards. *
 - iv. Publish strategic plan on website. *

Area #3: Governance

Purpose: PCBR ensures legal compliance, fiscal responsibility & efficient operation of the organization.

- I. Goal: Have a set of Bylaws that are approved by NAR & policies approved by PCBR BOD.
 - a. Strategies
 - i. Continue to evaluate current Bylaws vs NAR model Bylaws.
- II. Goal: CEO oversees operations, systems, facilities, consultants & staff.*

Approved 2016 Strategic Plan - FINAL

- a. Strategies
 - i. No individual on the BOD has access to the consultants without CEO & BOD authorization.

- III. Goal: PCBR DOB invests in the professional development of the CEO and staff.
 - A. Strategies
 - a. CEO attends Association Executives Institute convention
 - b. CEO completes a minimum of six hours of REALTORS® Association professional development annually as required by NAR*

- IV. Goal: PCBR provides leadership development for its CEO, BOD & committee chairs and staff.*
 - a. Strategies
 - i. CEO communicates state & national opportunities for education.
 - ii. President-Elect or other designee, attends UAR Leadership Academy.
 - iii. NAR annual & NAR Leadership & mid year attendance for CEO, president, president-elect, MLS director and up to 2 more as budget allows.
 - iv. UAR annual Convention attendance for CEO, president, president-elect.
 - v. Evaluate & support candidates for positions at the state and local levels.
 - vi. Provide a member slate of quality candidates for all UAR committees.
 - vii. Cultivate qualified candidates for consideration for the Utah Real Estate Commission.

- V. Goal: PCBR follows best practices for fiscal responsibility & adopts policies that ensure the fiscal integrity of our financial operations.
 - a. Strategies:
 - i. Annually evaluate fiscal metrics, management, consultants & business plan.
 - ii. Annually review the Strategic Plan
 - iii. Annual budget
 - iv. Annual CPA review and periodic audits
 - v. Continue to evaluate non-dues revenue & alternatives.
 - vi. Evaluates CEO annually

Approved 2016 Strategic Plan - FINAL

- VI. Goal: PCBR has a finance committee that has specific responsibilities to the BOD
 - a. Strategies
 - i. On a monthly basis the finance committee verifies expenses, ensures reconciliation & monitors the projected budget & makes a recommendation to the BOD to approve the financial statement
 - ii. Monitors investment policy as recommended by the financial consultants
 - iii. Formulate budget & make recommendation to the BOD
 - iv. Implement financial policy approved by the BOD
 - v. Task force to set forth criteria for members of the Finance Committee

- VII. Goal: PCBR continually evaluates opportunities for additional non-dues revenue income streams.
 - a. Strategies:
 - i. Evaluate current programs that other boards have incorporated. (Realtor.org & AE side of Realtor.org)

- VIII. Goal: PCBR is open to opportunities for members and/or acquisitions that will foster an environment for economies of scale and increased benefits/services for members.

- IX. Goals: PCBR regularly recognizes members that participate, volunteer, accomplish designations, etc...

Area #4: Community Relations

Purpose: By volunteering, donating and participating in local non-profit and community service organizations, PCBR demonstrates the positive role of REALTOR® s as an integral part of our community.

- I. Goal: PCBR invests in our community.*
 - a. Strategies
 - i. Organize human resources and fundraise for community and charity organizations.*
 - ii. Make direct contributions to community organizations through our Philanthropic Foundation.

Approved 2016 Strategic Plan - FINAL

Area #5: Advocacy

Purpose: PCBR is a proactive and influential voice in local government to protect, preserve and promote property rights and the professional interests of our industry.

- I. Goal: Promote political positions, platforms and policies to achieve the goals of our position statement.
 - a. Strategies:
 - i. Participate in Calls for Actions through REALTOR® Action Center and provide adequate proof of participation.
 - ii. Participate in state Calls for Action & provide proof of participation
 - iii. Demonstrate local advocacy engagement.
 - iv. ~~Engage~~ Communicate to public, legislative/political issues that impact real estate and related issues.
- II. Goal: Promote the value of investing in and the benefits received from the support of RPAC. (Raise funds to support RPAC)
 - a. Strategies:
 - i. Include voluntary RPAC contributions “above the line” in dues billing.
 1. PCBR to include on member billing, hold RPAC fundraisers, and recognize members’ RPAC support
 - ii. Communicate with members regarding the successes of advocacy efforts at all levels
- III. Goal: Financially & politically support candidates who champion our professional interests.
 - a. Strategies:
 - i. Engage the public in legislative/political issues that impact real estate & related issues.
 1. Legislative Committee to coordinate with UAR
 2. Utilize member email communication to communicate issues to members
 3. Social Committee to organize legislative forums.
- IV. Goal: Cultivate relationships with industry and non-industry organizations.
 - a. Strategies:
 - i. Promote the value proposition of using a REALTOR® and the Board as the local “Voice of Real Estate”

Approved 2016 Strategic Plan - FINAL

1. Work with other organizations to promote private property rights and home ownership.

Area #6: MLS

Purpose: PCBR has an income producing MLS that provides subsidies to the PCBR budget and provides “state of the art” services for its participants.

MLS Strategic Plan / Goals

I. Vision: Provide Superior Technology to Membership

A. Goals

1. Provide superior service, support, communication, and education for existing technology
2. Research innovative technology
3. Implement exceptional methods and solutions
4. Maintain user-friendly functionality
5. Maintain informational accuracy and integrity
6. Sustain profitability
7. Remain relevant
8. Provide programs and aid to support the members of the Park City Board of REALTORS®

B. 2016 Objectives

1. Implement single point data entry
2. Resolve outstanding Matrix punch-list
3. Resolve outstanding Realist tax issue
4. New eBlast solution