

MAR Strategic Plan 2017

GOAL 1	Enhance Membership Value		
	<p>MAR will lead the way in creating, coordinating and marketing the REALTOR® organization's Membership Value</p> <p>Desired Outcomes:</p> <ul style="list-style-type: none"> - Improve member communication - Enhance member programs - Provide enriching networking business and educational events - Maintain legally copyrighted updated MAR forms 		
Objective 1.1	Possible Action Steps	Timeline/Progress	Assigned
Improve internal and external communication	A. Increase social media presence	On-going	Allie/Comm Cmte
	B. Maintain updated and relevant web page	Launch 1/1/17-on-going	Allie/Comm Cmte
	C. Produce Quarterly MAR Digest	Quarterly/Annual	Allie/Comm Cmte
	D. Launch relevant and timely member survey's	3 rd Quarter, 2017	Allie/Comm Cmte
	E. Utilize Zoom software technology	On-going/schedule training	Comm Cmte
	F. Draft and implement a communication plan	Spring 2017	Allie/Comm Cmte
Notes:			
Objective 1.2	Possible Action Steps	Timeline/Progress	Assigned
Enhance member programs	A. Provide new member welcome packet	Summer 2017	Allie/Shanna/Comm Cmte
	B. Host timely and relevant broker forums	Bi-annual	Taylor/Jennie/Local AE's/BIC
	C. Maintain reliable association member database	Winter/Spring 2017	Shanna/Tanya/Assoc Mgmt Cmte
Notes: New member packet from state or locals? Note: Researching association databases			
Objective 1.3	Possible Action Steps	Timeline/Progress	Assigned
Business and educational events	A. Improving member Convention experience	Annually	Jennie/Allie/Convention Cmte/LT
	B. Schedule periodic Zoom educational forums	Bi-annual	Jennie
	C. Host annual housing summit	June	Taylor/Jennie/Allie/LT
	D. Explore Global Council	On-going/MIPIM 2018?	Taylor/LT/Global/Josh
Notes: Coordinate with State Chamber and Governor's Office of Economic Development to attend 2018 MIPIM Conference			
Objective 1.4	Possible Action Steps	Timeline/Progress	Assigned
Updated Forms	A. Explore option to create MAR Library of Forms	2017	Forms Cmte/Tanya
Notes:			

MAR Strategic Plan 2017

GOAL 2	<h3 style="text-align: center;">Political Advocacy</h3> <p>MAR will lead the statewide effort to position the REALTOR® organization as the most effective advocate for the real estate industry and private property rights in Montana.</p> <p>Desired Outcomes:</p> <ul style="list-style-type: none"> - Strengthen Grassroots efforts and Legislative Key Contacts program - Build, strengthen and promote RPAC/IMF Culture - Build strong coalition partners - Improve Government Affairs Committee processes 		
Objective 2.1	Possible Action Steps	Timeline/Progress	Assigned
Grassroots/Key Contacts	A. Achieve annual Presidents Cup	Annual	LT/Taylor/RPAC/RPMIC
	B. Candidate recruiting and training	On-going	Taylor/LT/GAC
	C. Publish statement of policy	January 2017/ update as needed	GAC/Taylor/Allie
	D. Evaluate MAR PACs and IE program	2017	Taylor/LT/GAC
	E. Conduct annual housing economic study	Annual	Taylor/LT/BBER
Notes: RPAC By-Law changes to be considered early 2017. Realtor Party Plus also considered early 2017.			
Objective 2.2	Possible Action Steps	Timeline/Progress	Assigned
RPAC/IMF Culture	A. Evaluate the RPAC awards	2017	Taylor/GAC/RPAC
	B. Increase promotion and participation	On-going	LT/RPAC/RPMIC/BIC
	C. Coordinate with local AOR fundraising activities	On-going	Taylor/RPAC/RPMIC/Locals
	D. Host annual fundraiser	Annual – late summer/Fall	Taylor/GAC/RPAC/LT
Notes: RPAC award changes in conjunction with new RPAC By-Laws			
Objective 2.3	Possible Action Steps	Timeline/Progress	Assigned
Coalition Building	A. Participate with Business Caucus	Monthly/On-going	Taylor/GAC
	B. Partner with like-minded organizations	Monthly/On-going	Taylor/GAC
	C. Conduct research of changing demographics	Annual	Taylor/Allie/BBER/Chamber
Notes:			
Objective 2.4	Possible Action Steps	Timeline/Progress	Assigned
GAC Process	A. Research bill tracking and review process	Immediate	Taylor/GAC/S360
	B. Improve and enhance DOL/BRR coordination	On-going	Taylor/GAC/Mark Simonich
Notes:			

MAR Strategic Plan 2017

GOAL 3	Legal Position MAR as the premier source for legal counsel. Desired Outcomes: <ul style="list-style-type: none"> - Establish online process - Maintain timely FAQs - Enhanced Hotline 		
Objective 3.1	Possible Action Steps	Timeline/Progress	Assigned
Online Process	A. Establish workgroup to explore online technology options	2017	LT/Taylor
	B. Survey other states	2017	Taylor/Allie
Notes: Currently reviewing McKenna Group's legal hotline program			
Objective 3.2	Possible Action Steps	Timeline/Progress	Assigned
FAQs	A. Create and maintain searchable archive	2017	Taylor
	B. Survey other states	2017	Taylor
	C. Update timely	On-going	Taylor
Notes: Currently reviewing McKenna Group's legal hotline program			
Objective 3.3	Possible Action Steps	Timeline/Progress	Assigned
Hotline	A. Maintain Broker or D.R. hotline access	24/7/365	MAR
	B. Survey states on In-House vs. Outsourcing legal services	2017	Taylor/Allie
	C. Prepare RFP for continued legal and hotline services (beginning 2018)	2017	Taylor/LT
Notes: Currently reviewing McKenna Group's legal hotline program. Question: can Associated Employers assist with RFP?			

MAR Strategic Plan 2017

GOAL 4	<h3 style="text-align: center;">Educational Excellence and Professional Development</h3> <p>Desired Outcomes:</p> <ul style="list-style-type: none"> - Achieve Core Standards - Enhance Mentoring and Leadership Development - Explore additional designations - Provide relevant and timely education 		
Objective 4.1	Possible Action Steps	Timeline/Progress	Assigned
Core Standards	A. Provide and promote value of Code of Ethics	On-going	Jennie/Pro Dev Cmte
	B. Raise professional standards	On-going	Jennie/Pro Dev Cmte
	C. Increase awareness in new member outreach	On-going	Allie/Shanna/Comm Cmte
	D. Explore improvements to State's standard enforcement process	2018	Pro Dev Cmte
Notes: MAR will always follow NAR Ethics and Standards while exploring improvements			
Objective 4.2	Possible Action Steps	Timeline/Progress	Assigned
Mentoring and Leadership Development	A. Continue Mentor Buddy System	On-going	?/Jennie
	B. Expand and promote Leadership Development Conference (LDC)	On-going	Jennie/LT
	C. Explore ways to promote YPN	On-going	MAR/YPN
	D. Explore additional tools/training for Leadership Development	On-going	Jennie
Notes: Current Mentor Buddy System needs updates			
Objective 4.3	Possible Action Steps	Timeline/Progress	Assigned
Designations	A. Continue GRI program	On-going	Jennie/GRI
	B. Continue relationship with CRS	On-going	Jennie/CRS
	C. Explore and provide additional designations that will enhance member knowledge	On-going	Jennie/Taylor
	D. Explore providing CE cruise	Ship sails 2018	Jennie/MAR
Notes:			
Objective 4.4	Possible Action Steps	Timeline/Progress	Assigned
Education	A. Explore reviving the Education Caravan	2018	Jennie
	B. Utilize technology to offer additional courses	On-going	Jennie/MAR
	C. Explore need to increase course instructors	On-going	Jennie/MAR
Notes: MAR will consult with Local AOR's to provide and improve CE and educational opportunities			

MAR Strategic Plan 2017

GOAL 5	MAR Management and Leadership		
	Desired Outcomes: <ul style="list-style-type: none"> - Improve Board and Committee Governance - Ensure financial stewardship - Update and promote Strategic Plan and ensure compliance - Maintain adequate staff and improve human resource processes - Evaluate member recognition and awards - Strengthen state programs 		
Objective 5.1	Possible Action Steps	Timeline/Progress	Assigned
Board and Committee Governance	A. Reappoint Board Structure PAG	1 st Quarter 2017	President John/Taylor/LT
	B. Explore standing committee and sub-committee structure	2017	PAG
	C. Assist Local AOR's with potential chapter formation	2017	LT/Taylor
Notes:			
Objective 5.2	Possible Action Steps	Timeline/Progress	Assigned
Financial Stewardship	A. Protect member dues	On-going	Shanna/Rick/Taylor/LT/Budget and Audit Cmte
	B. Explore non-dues revenue opportunities	On-going	Taylor/Jennie/Shanna/Affiliates
	C. Increase Affiliate membership	On-going	Taylor/Jennie/Shanna/Affiliates/A lie
	D. Enhance Affiliate Member services	On-going	Taylor/Jennie/Shanna/Affiliates/A lie
	E. Draft Investment Policy guidelines	January 2017	Taylor/LT/EC/BOD/Budget and Audit
	F. Explore additional investment advisors	January 2017	Taylor/LT/EC/BOD/Budget and Audit
Notes: Protecting member dues and reserve account, and exercising our fiduciary duties is of the highest importance.			
Objective 5.3	Possible Action Steps	Timeline/Progress	Assigned
Strategic Plan	A. Host annual Strategic Plan review	Annual	MAR/LT/EC/BOD
	B. Ensure Standing Committee participation	On-going	Standing Committees/MAR
	C. Coordinate with Budget and Audit Committee to match resources	On-going	MAR/Budget and Audit/Strategic Planning Cmte
Notes:			
Objective 5.4	Possible Action Steps	Timeline/Progress	Assigned
Staff and Human Resources	A. Update employee personnel policy	2017	Taylor/Jennie/Associated Employers
	B. Draft and implement retention and training guidelines	2018	Taylor/Jennie/Associated Employers
	C. Continue partnership with Associated Employers	Annually	Taylor/Jennie
	D. Draft and implement MAR mobile phone policy	January 2017	Taylor/Tanya/Association Mgmt Cmte
Notes: Mobile Phone Policy draft to committee January 2017, Implementation depends on committee discussion			
Objective 5.5	Possible Action Steps	Timeline/Progress	Assigned
Recognition and Awards	A. Evaluate current recognition and awards	3 rd Quarter 2017	Taylor/Jennie/LT

MAR Strategic Plan 2017

	B. Establish recognition wall at MAR	1 st Quarter 2018	Taylor/Allie/Jennie
	C. Evaluate RPAC recognition and awards	3 rd Quarter 2017	Taylor/Jennie/LT/RPAC
	D. Explore creation of Excellence in Real Estate award or similar	3 rd Quarter 2017	Taylor/Jennie/LT/Prof Dev Cmte
Notes:			
Objective 5.6	Possible Action Steps	Timeline/Progress	Assigned
Strengthening State Programs and Services	A. Research unified statewide lockbox options	2018	Taylor/PAG
	B. Research regional MLS mergers	Summer 2017	Taylor/PAG
	C. Launch ShowingTime statistical services	Spring 2017	Taylor/Assoc Mgmt Cmte
Notes: ShowingTime launch depends on local AOR's entering into third party agreement			



The Montana Association of REALTORS® (MAR) is the voice for real estate in Montana. We are a statewide trade association representing more than 3,600 members involved in all aspects of the residential and commercial real estate markets throughout Montana. The Montana Association of REALTORS® is the business and public policy advocate for its members and the consumers they serve.

MAR Mission Statement:

The mission of MAR is to advocate for its members and to protect the rights of property owners.

MAR Vision Statement:

REALTORS® ... the ultimate resource for real estate excellence.