



# Strategic Plan



# Who We Are

South Shore Realtors® is the second largest Realtor® trade association in Massachusetts and, in partnership with the Massachusetts Association of Realtors® and the National Association of Realtors®, provides its members the resources to deliver the highest level of professional and ethical services.



# Our Vision

South Shore Realtors® is ...



# What We Stand For

- **Governance:** Utilizing the talents of Leadership and Staff, South Shore Realtors® has a business structure that is fiscally responsive and positions the Association to fulfill its strategic plan.
- **Community Outreach:** South Shore Realtors® continuously enhances the value of the Realtor® brand and consistently demonstrates its commitment to improving the quality of life in our communities by involvement in community events, efforts in philanthropic endeavors and engagement of the community in advocating for issues that impact them.
- **Government Affairs:** Members understand the necessity of investing in the political process and the importance of solidifying their efforts to proactively protect private property and ownership rights affecting our industry and the communities we serve.
- **Communication:** Members and the communities they serve rely on the timely, accurate and relevant information communicated by South Shore Realtors®.
- **Professional Development:** South Shore Realtors® offers a full spectrum of professional and career development programs that exceeds member expectations.

**Strategic  
Purposes**



# Governance

## AREA 1

**Utilizing the talents of Leadership and Staff, South Shore Realtors® has a business structure that is fiscally responsive and positions the Association to exceed the objectives of its Strategic Plan.**

- 1A: The professional staff and business offices of South Shore Realtors® meets and exceeds the needs of its members.
- 1B: The business of the Association is managed in a fiscally responsible manner.
- 1C: The Association's governance structure is responsive and flexible to effectively manage, maximize and expedite the business of the Association.
- 1D: South Shore Realtors® is open to opportunities involving mergers, acquisitions, consolidations and partnering opportunities with other Realtor® and industry organizations.



**Strategic Objective: 1A: The professional staff and business offices of South Shore Realtors® meets and exceeds the needs of its members.**

- Strategy 1A1: South Shore Realtors® has exceptional professional staff to manage day to day operations and effectively implement the objectives of the strategic plan
- Strategy 1A2: South Shore Realtors® utilizes a Strategic Workforce Analysis to streamline staff duties/responsibilities, etc.
- Strategy 1A3: South Shore Realtors® promotes a welcoming atmosphere and professional/ethical environment
- Strategy 1A4: Office technology and resources are maximized for efficiency and meet/exceed the needs of our members.



## **Strategic Objective 1B: South Shore Realtors® manages the business of the association in a fiscally responsible manner**

- Strategy 1B1: The Association has a multi-year budget dedicated to funding its strategic plan.
- Strategy 1B2: The Association has a responsive budget that includes a capital reinvestment fund, dedicated funds, restricted funds and sufficient reserves to adequately fund the operations and strategic initiatives of its business.
- Strategy 1B3: The Association utilizes a vibrant/filterable database and online community platform that allows the selection of volunteer professionals with the appropriate skill sets and credentials to complete the projects outlined in the strategic plan.
- Strategy 1B4: South Shore Realtors® financially positions the Association to proactively anticipate and respond to the needs of its industry and members.
- Strategy 1B5: The profit/loss of each program, product and service is evaluated, including the analysis of staff and overhead as expenses to determine the actual and intrinsic return on investment.



## **Strategic Objective 1C: South Shore Realtors® has a responsive governance structure that effectively manages, maximizes and expedites the business of the Association.**

- Strategy 1C1: A Task Force will evaluate current governance structure and make recommendations for adjustments to the Board of Directors.
- Strategy 1C2: Roles and responsibilities of Officers, Directors and members serving the Association are clearly defined in an 'Agreement to Serve', which also provides them with opportunities for personal and professional growth.
- Strategy 1C3: The Association annually identifies, recruits and trains current and future leaders to ensure their responsibilities and role in the Association's success are understood.
- Strategy 1C4: To effectively achieve the goals of its Strategic Plan, the Association leverages the talents of its members by implementing project-based management strategies.
- Strategy 1C5: The CEO ensures that the Association is protected against risk. The CEO is committed to enforce the votes of the Board of Directors, the Bylaws and ensure the governing documents are legally compliant and minimize the risk position of the Association.





**Strategic Objective 1D: South Shore Realtors® is open to opportunities involving mergers, acquisitions, consolidations and partnering opportunities with other Realtor® and industry organizations.**

- Strategy 1D1: South Shore Realtors® has a process for entertaining conversations with other groups regarding future opportunities for mergers, acquisitions or consolidations.
- Strategy 1D2: Once an interest has been entertained, all Board members are aware that only authorized persons are able to speak/act on the Association's behalf.
- Strategy 1D3: South Shore Realtors® seeks out partnering opportunities with Institutes, Societies, Councils, cultural and business organizations.
- Strategy 1D4: South Shore Realtors® has a profitable non-dues revenue stream from a comprehensive affiliate and sponsorship program.




# Community Outreach

## AREA 2


South Shore Realtors® continuously enhances the value of the Realtor® brand and consistently demonstrates its commitment to improving the quality of life in its communities by involvement in community events, efforts in philanthropic endeavors and engagement of the community in advocating for issues that impact them.

- 2A: South Shore Realtors® participates in a variety of programs, events and philanthropic efforts that benefit the communities it serves.
- 2B: Through dynamic communication methods, South Shore Realtors® promotes its efforts and legislative successes to provide opportunities for consumers to engage in the advocacy process, ensuring the public understands the Association's commitment to elevating the quality of life in its communities.
- 2C: South Shore Realtors® strives to partner with community organizations, collectively mobilizing the public to proactively advocate for private property and home ownership rights that affect its communities.
- 2D: South Shore Realtors® leverages the relationships that its members have with commissions, community and charity boards to mobilize them with a uniform message to affect positive change.




**Strategic Objective #2A: Program & Events: South Shore Realtors® participates in a variety of programs, events and philanthropic efforts that benefit the communities it serves.**

- Strategy 2A1: The Association identifies, selects and coordinates with community groups and organizations to elevate the quality of life for the communities it serves.
- Strategy 2A2: Once the Board of Directors determines the quantity and the quality of projects; events and programs are evaluated for their return on investment.
- Strategy 2A3: Set and implement criteria for philanthropic endeavors and charitable giving Association-wide.
- Strategy 2A4: South Shore Realtors® evaluates the merits of setting up a 501c3 Charitable Foundation.



**Strategic Objective 2B: Through a dynamic and interactive consumer-oriented website, South Shore Realtors® promotes its efforts and legislative successes, providing an opportunity for consumers to engage in the advocacy process ensuring the public understands the Association's commitment to elevating the quality of life in its communities.**

- Strategy 2B1: Drive traffic to consumer-facing website landing page.
- Strategy 2B2: Develop a communications plan to include monthly articles linking back to website for more information.
- Strategy 2B3: Incentivize affiliates to engage in reciprocal/bilateral website promotion links.
- Strategy 2B4: Collaborate with area colleges and school internship programs to create and manage the Association's consumer website to convey information, legislative successes and engage them to participate in advocacy.
- Strategy 2B5: Link to all South Shore Realtors® communities, chambers, towns and external websites to drive traffic to the Association's consumer site.
  - Schools; Welcome Wagon Campaigns
- Strategy 2B6: Consider incorporating aspects of non-dues revenue into website.
  - Advertising



**Strategic Objective 2C: South Shore Realtors® strives to partner with community organizations, collectively mobilizing the public to proactively advocate for private property and ownership rights that affect its communities.**

- Strategy 2C1: Investigate community issues of mutual interest to partner on through a Town Hall Monitor Program and the creation of LPC's (Local Political Coordinators).
- Strategy 2C2: Develop reciprocal website linking program that intersects with community and municipal boards, commissions and organizations.



**Strategic Objective 2D: South Shore Realtors® leverages its members' relationships with community/charity boards and commissions, mobilizing them to carry a uniform message to affect positive change.**

- Strategy 2D1: Utilize member profile information to identify those members involved in community/charitable organizations and leverage those relationships.
- Strategy 2D2: Provide members with the tools necessary to effectively communicate the South Shore Realtors® brand, message, strategy and the benefits of partnering.
- Strategy 2D3: Create a list of Realtors® who serve on local chambers, rotary, community boards, charities and civic organizations for the purposed of coordinating and leveraging their influence.



# Government Affairs

## AREA 3

**Members understand the necessity of investing in the political process and the importance of solidifying their efforts to proactively protect private property and ownership rights affecting our industry and communities.**

- 3A: Members have a vibrant culture of financially investing in the political process
- 3B: In coordination with NAR and MAR, South Shore Realtors® educates and informs members of the unified policy positions relating to the importance of affordable housing, private property and ownership rights.
- 3C: South Shore Realtors® leverages the relationships that members have with local and state political figures and mobilizes them to carry a uniform message to affect positive change.
- 3D: South Shore Realtors® increases its local advocacy engagement and influence by identifying and coordinating with qualified members serving in high level local and municipal community boards, commissions and government positions.
- 3E: South Shore Realtors® has a comprehensive and interactive consumer site promoting the issues affecting property rights and advocacy opportunities available to defend the use of those rights



## **Strategic Objective 3A: Members have a vibrant culture of financially investing in the political process.**

- Strategy 3A1: Educate members regarding the benefits of investing to increase RPAC participation.
  - Annual RPAC Event
- Strategy 3A2: Reach out to Broker/Owners/Managers with promotional material to distribute to their agents electronically or in person to help explain the benefits of investing
  - Showcase the broker/owner/managers and team leaders that set a great example.
  - Brochures, PowerPoint Presentations, Road Shows, etc.
- Strategy 3A3: Focus on the members who already invest and help them understand the benefits of increasing their financial investment to the next level of participation






**Strategic Objective 3B: In coordination with NAR and MAR, the South Shore Realtors® educates and informs members of the unified policy positions relating to the importance of affordable housing, private property and home ownership rights.**

- Strategy 3B1: Educate members on local, state and national legislative issues.
  - Annual fair and affordable housing meeting
- Strategy 3B2: Incorporate a fair housing educational piece to the new member orientation by dispensing an informational packet or an electronic link to the information and videos on the NAR website.
- Strategy 3B3: Include opportunities at member events for local/state/national legislative officers to discuss legislative issues, positions and policies.
- Strategy 3B4: Host a forum for elected officials and future candidates to inform and interact with members on issues of local and state importance.
- Strategy 3B5: Provide opportunities for the RPAC representatives to educate members on the benefit of RPAC at member meetings and events.




## **Strategic Objective 3C: The South Shore Realtors® leverages the relationships that members have with local and state political figures and mobilizes them to carry a uniform message to affect positive change.**

- Strategy 3C1: The South Shore Realtors® has a Town Hall Monitor Program and an LPC (Local Political Coordinators) program which identifies and mobilizes members having a high-level personal relationship with local, state and federal elected officials, to respond to calls for action.
- Strategy 3C2: Increase awareness at member events and orientation so members understand the need to immediately respond to all calls for action.
- Strategy 3C2: Promote and increase participation among the YPN's and garner their support in mobilizing others to respond to all calls for action.
- Strategy 3C3: Educate and engage brokers/owners to participate in NAR's Broker Involvement program.
- Strategy 3C4: Partner with office managers and team leaders to mobilize their offices and agents to participate in all calls for action.



**Strategic Objective 3D: South Shore Realtors® increases its local advocacy engagement and influence by identifying and coordinating with qualified members serving in high level local and municipal community boards, commissions and government positions.**

- Strategy 3D1: Utilize a comprehensive database that contains specific information about members who serve on outside municipal community boards, commissions and government positions.
- Strategy 3D2: Once identified, those members are provided information on South Shore Realtors® legislative positions and issues.
- Strategy 3D3: Open bi-lateral communication venues using a variety of strategies to coordinate issues of common interest.
- Strategy 3D4: Create opportunities for bi-lateral linking on the Association's public facing website.



**Strategic Objective 3E: South Shore Realtors® has a comprehensive and interactive consumer site promoting issues affecting property rights and advocacy opportunities available to defend the use of those rights.**

- Strategy 3E1: Research and evaluate the benefits of utilizing the House Logic templates provided by NAR and other available templates.
- Strategy 3E2: Ensure that a ‘Call for Action’ component can be incorporated, mobilizing consumers to help assist in advocacy efforts on issues affecting the quality of life in our communities.



# Communications

## AREA 4

Members and the communities they serve rely on the timely, accurate and relevant information communicated by South Shore Realtors®.

- 4A: Members depend on the communications of South Shore Realtors® and consider the information essential to the success of their business.
- 4B: Members are aware of the achievements of the Association and know how these achievements support their business.
- 4C: South Shore Realtors® continuously strives to enhance and improve the community's perception and awareness of the value that Realtors® provide.
- 4D: The public recognizes that South Shore Realtor® Members are educated professionals that adhere to a strict code of ethics exceeding the minimum requirements of non-Realtor® licensees.



**Strategic Objective 4A: Members depend on the communications of South Shore Realtors® and consider the information essential to the success of their business.**

- Strategy 4A1: Based on the different preferences of members, multiple platforms are utilized to communicate so that each member can receive information in their preferred manner.
  - Use Higher Logics and maximize the scope of its capacity.
  - Social media, website, member meetings, etc.
- Strategy 4A2: Deliver the variety of informational messages in an engaging way so that members will read them.



## **Strategic Objective 4B: Members are aware of the achievements of the Association and know how these achievements support their business.**


- Strategy 4B1: South Shore Realtors® promotes the achievements of the Association to members through its website, member community platform and various types of media.
  - Showcase achievements at member gatherings, utilizing the opportunity to cross-market other events, advanced courses, etc.
- Strategy 4B2: Seek out unique opportunities to expose members to events and programs.
  - Use the help of sponsors and affiliate members to support 'door prizes' that could include comped entrance to events, advanced courses, ticketed programs, etc.
  - Brainstorm other opportunities.



**Strategic Objective 4C: South Shore Realtors® continuously strives to enhance and improve the community's perception and awareness of the value that Realtors® provide.**

- Strategy 4C1: Use the Association's public facing consumer website to engage its communities.
- Strategy 4C2: Connect to community and civic platforms and organizations via bi-lateral linking and outreach to forward the Association's message.
- Strategy 4C3: Identify, coordinate and mobilize members that serve on charitable and community organizations, providing them with uniform messaging of the Association's programs, services and policy positions.





**Strategic Objective 4D: The public recognizes that South Shore Realtor® members are educated professionals that adhere to a strict code of ethics which exceeds the minimum requirements of non-Realtor® licensees.**

- Strategy 4D1: Members are provided with knowledge, information and materials to communicate why the public should hire a Realtor®.
- Strategy 4D2: South Shore Realtors® implements a formal, structured plan for their Association media and marketing presence when communicating the “power of R”.
  - Video, member messages
  - Power of “R”
  - Formulate a campaign
  - Billboards, TV
  - Coordinate with Affiliates




# Professional Development

**South Shore Realtors® offers a full spectrum of professional and career development programs which exceeds member expectations.**

- 5A: Professional and career development offerings are diversified and provide all member audiences with quality programming
- 5B: South Shore Realtors® secures the highest quality trainers who deliver field relevant presentations in an engaging manner through a variety of training delivery methods.
- 5C: South Shore Realtors® continues to provide free periodic continuing education to members which satisfies the state's basic licensing requirements in any two year period.
- 5D: South Shore Realtors® delivers professional and career development programs through a variety of learning platforms.
- 5E: South Shore Realtors® has a Professional Standards program in compliance with all NAR requirements.

**AREA 5**




## **Strategic Objective 5A: Professional and career development offerings are diversified and provide all member audiences with quality programming.**

- Strategy 5A1: Use a variety of methods to discover the professional, career and personal educational needs of members.
  - Online Community Platform
  - Surveys and Member Event Evaluations
- Strategy 5A2: Member audiences have been identified who would benefit by advanced business and career curricula.
  - Orientation, Newly Licensed, Seasoned Agents, Teams, Managers/Brokers, etc.
- Strategy 5A3: Consider partnering with private firms to deliver advanced designation programs for a proprietary learning opportunity.
  - Provide a wholesale – retail event planning opportunity for non-dues revenue.
- Strategy 5A4: A variety of relevant educational opportunities are offered to formulate a logical path from newly licensed to business specialty experts, providing members an advanced comprehensive learning experience.
  - Orientation, Skill programs, CE, Designation, Business Specialty Programs, Business Management.



## **Strategic Objective 5B: South Shore Realtors® secures the highest quality trainers who deliver field relevant presentations in an engaging manner.**

- Strategy 5B1: Using a variety of research methods, only engaging trainers are hired.
  - Via personal referrals, online technology, current experiences, recurring trainers, reputation, national and state programs.
- Strategy 5B2: Coursework is delivered by selected trainers who possess field relevant information in the subject matter.
- Strategy 5B3: All trainers are re-evaluated based on performance reviews and evaluations.
- Strategy 5B4: Trainers are hired depending on the specific topic and level of course material.



**Strategic Objective 5C: South Shore Realtors® continues to provide free periodic continuing education to members which satisfies the State's basic licensing requirements in a two year period.**

- Strategy 5C1: Seize the opportunity to upsell/cross sell advanced career development programs and events
  - Raffles for advanced courses, one-day discounts for future courses.
- Strategy 5C2: Use Sponsors and Affiliates to partner with South Shore Realtors® to deliver free member CE programs, showcasing the specific vendor.
  - Onsite and offsite
  - Association markets course for the sponsor/vendor to garner attendees.



## **Strategic Objective 5D: South Shore Realtors® delivers professional and career development programs through a variety of learning platforms**

- Strategy 5D1: Consider collaborating with Institutes, Societies and Councils and other associations to deliver high-level live virtual advanced designation courses.
  - Research cost effective live-virtual learning platforms.
  - Ensure that the building technological infrastructure can handle live streaming bandwidth.
- Strategy 5D2: Select trainers who are comfortable using a variety of learning platforms.
  - Webinars, online, live virtual, live class, panel programs.



## Strategic Objective 5E: South Shore Realtors® has a Professional Standards program in compliance with all NAR requirements.

- Strategy 5E1: Per NAR Core Standards, the South Shore Realtors® provides new and continuing member Code of Ethics training as required by *Professional Standards Policy Statements #47 and #48*.
- Strategy 5E2: Enforcement can be conducted by the Association itself, associations can develop multi-association or regional enforcement mechanisms, and state associations can take on some or all enforcement duties.
- Strategy 5E3: South Shore Realtors® is required to offer, either directly or as part of a cooperative enforcement agreement (consistent with *Professional Standards Policy Statement #40, Cooperative Enforcement Agreements*, Ombudsman services to members, to members' clients, and to consumers.
- Strategy 5E4: The member website links to the Code of Ethics and Professional Standards resources available from NAR, and from the state association if available. A link to the NAR resources can be found in Section I of the online Compliance Tool. In addition, NAR's Member Policy staff has created a [comprehensive compendium of information](#) that includes the Code of Ethics, explanatory whitepapers (e.g. *Before You File an Ethics Complaint*, the *Sanctioning Guidelines*, and others), standard forms for filing and processing ethics complaints and arbitration requests, the Statements of Professional Standards Policy adopted by the NAR Board of Directors, as well as resources for professional standards administrators.