



PPAR STRATEGIC PLAN

ENDS STATEMENTS

Policy 1.0 Ends Statement

- 1.1.1 The public values, respects and uses REALTORS®
- 1.2 REALTORS® adhere to Ethical Standards which are enforced
- 1.3 Public policy/regulations are favorable to the real estate industry
- 1.4 RSC Participants have current, accurate and comprehensive information services with support
- 1.5 Members are knowledgeable about industry issues/trends
- 1.6 Members are educated about professional courtesies and industry standards
- 1.7 There is a sense of mutual purpose and support among members
- 1.8 Members are aware of exclusive benefits

Strategic Goal #1 GOVERNANCE

PPAR's purpose is to protect private property rights and provide a business structure that adapts to industry changes and members' needs.

Strategic Objectives	Action Steps:	Responsibility & Timeline
<p>1.1 Facilities/Operations Objective: PPAR maintains efficient space that accommodates day-to-day operations and maximizes use of the asset.</p>	<ul style="list-style-type: none"> a) Create a Task Force to review options for long-term building strategy and organizational needs b) Ensure there are dedicated funds for maintaining property throughout its lifecycle by creating a capital expense plan/budget c) Ensure policies, budget and operations encourage best use of building and 100% tenant occupancy of available space 	<ul style="list-style-type: none"> a) Created by BOD – Completion Q1 2018 FY b) Created by CEO/CFO – Completion Q2 2018 FY c) Created by CEO/CFO - Ongoing
<p>1.2 Fiscal Responsibility Objective: PPAR is fiscally sound and utilizes funds for advancement of our business.</p>	<ul style="list-style-type: none"> a) Create a task force to develop a “worst-case scenario” model to deal with industry and market changes b) Create monthly BOD Dashboard/Report to inform Directors on achievement of financial, operational and strategic goals c) Explore creating fiscal oversight that is complimentary to the guidelines of policy governance d) Develop an annual, balanced budget which supports the strategic initiatives e) Ensure the annual budget is not reliant on reserves or MLS income f) Examine and implement programs for non-dues revenue g) Maintain a Long-Term Investment Committee to ensure appropriate performance 	<ul style="list-style-type: none"> a) Created by BOD –Q1 2018 FY b) Created by CEO – Q1 2018 FY/On-going c) Created by CEO/BOD – Q1 2018 FY/on-going d) Created by CEO/Staff – On-going e) CEO/CFO – On-going f) CEO/Staff – On-going g) CFO/Policy Governance – On-Going
<p>1.3 Management and Staff Objective: PPAR maintains superior staff through professional development, support, and competitive compensation.</p>	<ul style="list-style-type: none"> a) Ensure the annual Budget supports staff's professional development through appropriate allocation of funding b) Develop Compensation and Bonus Policies c) Develop an annual performance evaluation process which encourages growth and development d) Ensure organizational structure supports operations as well as provides opportunity for staff development and innovation e) Ensure appropriate CEO Evaluation process is in place which ties CEO performance and company performance 	<ul style="list-style-type: none"> a) CEO/CFO – Q1 FY 2018 – On-going b) Created by CEO/BOD Approval – End of FY 2017 c) Created by CEO – End of FY 2017 d) CEO – On-going e) CEO/Executive Committee – End of Q3 Annually, On-Going

<p>1.4 Leadership Development Objective: PPAR develops effective and strong leaders through engagement of members with internal knowledge of our Association by inspiring involvement at all levels of our industry.</p>	<ul style="list-style-type: none"> a) Produce effective and strong leaders through PPARs annual Leadership Academy b) Leadership Academy is reviewed annually to ensure program is consistent with trends and changes in leadership training c) Develop Leadership Academy follow-up program and implement d) Support directors through investment in a continual leadership training and growth program e) Develop a Task Force to explore options to enhance volunteer engagement through Leadership and Membership Recognition programs which highlight contributions to REALTOR organization and industry f) Develop a robust program of events and forums which encourage interaction between leadership and members g) Identify special skills and interests of members and use information to recruit and engage volunteer leaders into all areas of the association 	<ul style="list-style-type: none"> a) Leadership Academy Task Force/Staff Liaison – On-Going b) Leadership Academy Task Force – Q1 Annually starting FY 2018, on-going c) Created by Leadership Academy Task Force – Q3 FY 2018 d) CEO – Q1 FY 2018, on-going e) Created by BOD – Q4 FY 2018 f) Member Linkage – Annually, on-going g) Created by group TBD by BOD – Q1 FY 2019, on-going
<p>1.5 Structure and Growth Objective: PPAR's structure of policy governance allows for adaptability to industry changes in order to effectively run its business.</p>	<ul style="list-style-type: none"> a) Develop a Work Group to review governing documents to ensure PPAR is an adaptable b) Policy Governance Manual is reviewed annually c) Committee, Task Force and Work Group structure is reviewed annually to ensure it supports business plan 	<ul style="list-style-type: none"> a) Created by BOD – Q2 FY 2018 b) CEO and Board Development – Q1 Annually beginning FY 2019 c) CEO and BOD – Q4 Annually, beginning FY 2017

Strategic Goal #2 PUBLIC POLICY

The members of PPAR are actively engaged in advocating for the protection of private property rights, free enterprise and public policy.

Strategic Objectives	Action Steps:	Responsibility & Timeline
<p>2.1 RPAC Fundraising Objective: PPAR members understand the importance of the REALTOR® Political Action Committee (RPAC) and are financially invested.</p>	<ul style="list-style-type: none"> a) Set annual participation goal, major investor goal, participation goal b) Establish annual fundraising and communication plans c) Educate and solicit investments from members d) Promote culture of investment e) Determine RPAC dues billing inclusion above- and below- the line annually f) Develop local RPAC investor recognition program to encourage participation 	<ul style="list-style-type: none"> a) Government Affairs Committee – End of Q1 Annually, beginning FY 2018 b) Government Affairs Committee – End of Q1, Annually, beginning FY 2018 c) Communications Staff – On-going d) Government Affairs Committee – End of Q3 Annually

		e) Created by Government Affairs Committee – Q4 FY 2018
2.2 Platform/Position on Issues Objective: PPAR actively advocates for the promotion and protection of the regulatory and political environment in the Pikes Peak Region.	<ul style="list-style-type: none"> a) Public Policy/regulations are favorable to the real estate industry. b) Support, protect, and advance issues and candidates that protect private property rights and the free enterprise system. c) Political committee develop annual plan and makes recommendations for investments/contributions to issues and candidates that are REALTOR® friendly. 	<ul style="list-style-type: none"> a) Government Affairs Committee – On-Going, in place b) Government Affairs Committee - Annually, based on election cycles, in place c) Created by Government Affairs Committee – on-going, in place
2.3 Grassroots Involvement in Advocacy Objective: PPAR members are engaged. understand, support, and communicate a uniform message for political and regulatory advocacy.	<ul style="list-style-type: none"> a) Members participate in all areas of public policy process to increase knowledge and effectiveness. b) Members serve on various committees with industry partners, community organizations, and government entities. c) Create and provide information and materials to Members to use for grassroot efforts. 	<ul style="list-style-type: none"> a) Plan to be created by staff – Q4, starting FY 2017 b) Staff – on-going, in place c) Plan to be created by staff – as needed, annually/on-going
2.4 Cultivation of Relationships Within the Industry and Community Objective: PPAR develops relationships within industry, community, political, and business partners and leaders.	<ul style="list-style-type: none"> a) PPAR maintains a database of members participating in other boards, committees, task forces, and other organizations. b) Develop program to use the database to support this objective c) PPAR manages a list of identified organizations to collaborate with and promotes active engagement with those groups so REALTORS® have a seat at the table. d) Cultivate relationships with outside organizations. e) Political committee develops annual plan and makes recommendations for investments/contributions to support and partner with organizations throughout the Pikes Peak region. f) Develop reporting mechanism to demonstrate progress and achievements 	<ul style="list-style-type: none"> a) Created by Public Policy Staff – Q2 FY 2018 b) Created by Government Affairs Committee– Annually, starting Q4 FY 2018 c) Created by Staff, Monitored/managed though Political Committee – Annually, starting Q2 FY 2018 d) Staff/Leadership Volunteers – On-going e) Government Affairs Committee – Annually, on-going f) Public Policy Staff/CEO – Q4 FY 2018, annually

Strategic Goal #3 COMMUNITY RELATIONS

The community understands and appreciates the role and contributions of REALTORS® in the Pikes Peak region.

Strategic Objectives	Action Steps:	Responsibility & Timeline
----------------------	---------------	---------------------------

<p>3.1 Programs Objective: The community recognizes the value of the REALTOR® brand.</p>	<ul style="list-style-type: none"> a) Ensure annual business plan and budget support the Community Relations Program b) Develop methods for tracking achievement of association contribution to community 	<ul style="list-style-type: none"> a) Staff and Community Relations Committee – Annually beginning FY2018 b) Community Relations Committee – Q4 FY 2018
<p>3.2 Mobilizing Community Support for Issues Objective: The community understands the importance of partnering with PPAR issues and policies affecting private property rights.</p>	<ul style="list-style-type: none"> a) Investigate offerings from NAR, CAR and other groups which can be used to mobilize community around policy issues b) Use multiple channels, including PPAR.com and local media, to message to consumers c) Government Affairs and Community Relations work in partnership to develop strategies to communicate with the community on issues d) Utilize participation community events to educate consumers on value of REALTORS® and/or policy issues e) Develop consumer-focused materials and messages to support efforts f) Explore partnering with a PR Firm to assist in efforts 	<ul style="list-style-type: none"> a) Staff investigates and presents options to Community Relations Committee as necessary – On-going, to begin FY 2018 b) Staff – On-going, to begin FY 2018 c) Staff and Committee Chairs – On-going, to begin FY 2018 d) Community Relations Committee – On-going, FY 2018 e) GA and Community Relations Committees, On-going, as-needed, to begin FY 2018 f) Staff – Q4 FY 2018
<p>3.3 Member Recognition Objective: PPAR encourages individual REALTOR® participation in the community through recognition of contributions.</p>	<ul style="list-style-type: none"> a) Develop a plan to find out where members are individually involved in the community b) Create Task Force to develop Member Recognition program similar to the NAR Good Neighbor Award c) Utilize information on member activities as consideration for association's community projects and programs 	<ul style="list-style-type: none"> a) Community Relations – on-going, to begin FY 2019 b) Created by BOD – FY 2019 c) Community Relations – on-going, to begin FY 2019
<p>3.4 Member Mobilization Objective: PPAR mobilizes members to participate in events supporting the community.</p>	<ul style="list-style-type: none"> a) Communicate the value of association community involvement with Members to encourage participation b) Develop plan with recruitment plan and goals for participation 	<ul style="list-style-type: none"> a) Communications Staff – on-going, to begin by Q3 of FY 2018 b) Community Relations – on-going to begin by end of FY 2018

Strategic Goal #4 COMMUNICATIONS

Through varied, accurate and reliable communication mediums, internally and to the public, we protect and strengthen PPAR and the value of our REALTOR® brand.

Strategic Objectives	Action Steps:	Responsibility & Timeline
<p>4.1 Members (Internal) Objective: Our members benefit from varied mediums and efforts used to communicate and keep the membership informed and educated.</p>	<ul style="list-style-type: none"> a) Develop a value proposition to support effective and meaningful member communication b) Explore different methods and technologies for delivery of communications to ensure reaching a maximum number of members c) Develop annual communications plan for all programs, services, industry news and trends, and general or special announcements d) Budget shall support a robust and multi-channel communication program e) Communication of statewide and national issues shall be a part of PPAR Communications f) Develop a strong, visible brand for the association g) Communication plan encourages participation in the association h) Identify different member segments as part of the communication plan i) Utilize analytics to gauge effectiveness of communications. Analytics shall be reported to the BOD j) Create a program of Leadership specific communication to support work of the Directors 	<ul style="list-style-type: none"> a) CEO and Staff- Approved by BOD – Development to begin FY 2018 for implementation no later than FY 2019 b) Communications Staff – On-going – to begin Q4 FY 2017 c) Communications Staff – Annually, to begin FY 2018 d) CEO & Communications Staff – Annually, to begin FY 2018 e) Communications Staff – On-going f) CEO – To begin FY 2018 for implementation with Value Proposition g) Communications Staff – On-going, to begin FY 2018 h) Communications Staff – On-going, to begin FY 2018 i) Communications Staff/CEO – On-going, to begin communications plan in place j) CEO/Communications Staff – On-going, to begin by Q2 of FY 2018
<p>4.2 Public (External) Objective: As the trusted voice of real estate, PPAR provides the public accurate and reliable information through varied mediums demonstrating the value REALTORS® deliver.</p>	<ul style="list-style-type: none"> a) Offer public timely and valuable real estate news and information through multiple channels b) Distribute informative and engaging local monthly statistics to the public c) All public communications shall align with PPAR Brand d) Use website, media and other channels to communicate with the public e) Explore the development of a strategic and on-going Public Relations program f) Explore products and services which can be used by Members to engage public with REALTORS® 	<ul style="list-style-type: none"> a) Communications/RSC Staff – On-going, in place b) Communications/RSC Staff- On-going, in place c) Communications Staff – on-going, implemented with new branding efforts and value proposition d) Communications staff – on-going, in place with new ppar.com redesign

		<ul style="list-style-type: none"> e) Staff – Q4 FY 2018 f) Staff/Various Committees – On-going, to begin FY 2018
<p>4.3 Message and Value Proposition: A REALTOR® is a necessary and valuable partner in the real estate transaction, a committed defender of private property rights and operates with a high level of integrity that embodies the Code of Ethics.</p>	<ul style="list-style-type: none"> a) Develop a Value Proposition b) Communications support and enforce the value proposition c) Association brand supports and enforces the value proposition 	<ul style="list-style-type: none"> a) CEO and Staff- Approved by BOD – Development to begin FY 2018 for implementation no later than FY 2019 b) Communications Staff – on-going, implemented with new branding efforts and value proposition c) Communications Staff – on-going, implemented with new branding efforts and value proposition

Strategic Goal #5 CAREER AND PROFESSIONAL DEVELOPMENT

Members recognize, value, and engage in continued career development to attain the highest level of professional competency and performance.

Strategic Objectives	Action Steps:	Responsibility & Timeline
<p>5.1 Setting the Standard Objective: PPAR consistently provides quality, relevant professional development courses to help elevate member’s skills for their specific areas of business specialty.</p>	<ul style="list-style-type: none"> a) Business Plan and budget support robust professional development program b) Develop professional development program to support different business specialties c) Develop professional development program to support obtaining designations and certifications d) Develop system to track specialties, certifications and designations e) Create task force to analyze developing a PPAR-specific designation, certification or specialization 	<ul style="list-style-type: none"> a) CEO/ Approved by BOD – FY 2018 b) Staff/Various Committees – On-going, to begin FY 2018 c) Staff/Various Committees – On-going, to begin FY 2018 d) Staff – On-going, in place by Q1 of FY 2019 e) Created by BOD – FY 2019

5.2 Education Mediums: PPAR delivers career development opportunities by using multiple mediums.	a) Create Task Force to explore options for delivery of education to support needs of all members and different learning styles	b) Created by BOD – Q4 FY 2018
5.3 Enforcement of Professional Standards Objective: PPAR enforces the NAR mediation, grievance, and professional standards process.	a) Maintain an effective local enforcement program b) Annually train Professional Standards volunteers to ensure all members are adequately trained c) Develop communication and education program which supports strict adherence to the Code of Ethics and Professionalism d) Maintain at least one certified professional standards administrator on staff	a) Staff/Committee/BOD – Annually, on-going b) Staff/Committee/BOD – Annually, on-going c) Member Linkage Committee – Annually, in place FY 2018 d) CEO – On-going

Strategic Goal #6 MLS

The REALTOR® Association owned MLS provides a profitable venture that is a fast, accurate and reliable MLS service for REALTORS®.

Strategic Objectives

6.1 Business Model Objective: The REALTOR® Association owned MLS is committed to maintaining cooperation between subscribers and provided uniform rules and structure while promoting the REALTOR® brand.

--Promote and advertise websites.

6.2 Business Products Objective: The REALTOR® Association owned MLS provides quality, leading edge services and technology, to include a lockbox system, and support to its subscribers.

--Staying current with technology advancement and standards in the real estate industry to include syndication, marketing, and data sharing.

--Employ staff that is well trained, knowledgeable and dedicated which provides MLS, lockbox and product support.

6.3 Future Mergers, Acquisitions, Consolidations Objective: The REALTOR® Association owned MLS will take a leadership role in analyzing the risk and benefits to position PPAR for long term viability.

--Designate a workgroup to advise and make recommendations to PPAR.

6.4 Loss of Income Objective: PPAR has a financial contingency plan for the ramifications for the loss of income. RSC will provide and maintain additional revenue streams and services in order to be relevant and profitable in the absence of the MLS or other RSC income.

--Designate a workgroup to advise and make recommendations to PPAR.