



MN-RPAC STRATEGIC PLAN

2017-2020

Abstract

This is the proposed strategic plan for MN-RPAC for the years 2017-2020



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Table of Contents

Strategic Planning Overview	2
Committee members	2
Dates	2
Where have we been?	2
Review annual RPAC membership survey	2
Three-year fundraising review & disbursements	2
Current bylaws overview	2
Vision for MN-RPAC	3
Mission of MN-RPAC	3
SWOT Analysis.....	3
Goal Setting with Objectives.....	4
Fundraising.....	4
Disbursements	6
Bylaws	6
Capacity Assessment.....	7
Time, Money, People	7
Appendix	8

Strategic Planning Overview

Committee members

The Strategic Planning Committee was appointed by MN-RPAC Chair Patty Zuzek and approved by the MN-RPAC Board of Trustees. The committee consisted of the following members: Maranda DeSanto (AE), Nick Dreher, Deb Greene, Rod Helm, Steve Hoem, Jerry Teeson, Geri Theis and Jerry Westhoff. The committee was staffed by Christine Berger and Kevin Zabel.

Dates

The Committee met on November 17, December 7, December 21 in 2016 and January 25, 2017.

Where have we been?

Review annual RPAC membership survey

Staff reviewed with the committee the last two annual RPAC membership surveys. Highlights include:

- Non-investors said reasons for not giving included lack of personal funds to invest and confusion towards the mission of RPAC.
- Major Investors said “RPAC is an investment in my career and I invest because I want to show leadership.”
- Investors: 62% said they felt recognized for their investment and in a separate question, 58% said they ‘do not like to draw public attention to my investment’.

Summaries of the surveys can be found in the appendix.

Three-year fundraising review & disbursements

The committee reviewed the following fundraising data for the previous three years. They also reviewed the expenditures. Copies of the 2016, 2015 and 2014 budgets can be found in the appendix.

Year	State	Total hard and soft \$ Raised	Participation	Major Investors	PC Members	Hard dollars in MN	Expenses
2016	Minnesota	\$376,960	0.24	99	17	\$379,763	\$338,446
2015	Minnesota	\$342,620	0.22	91	17	\$290,694	\$201,600
2014	Minnesota	\$304,344	0.17	76	15	\$232,132	\$209,016

Current bylaws overview

The committee reviewed the current MN-RPAC bylaws structure. A copy of the current bylaws last approved in 2016 can be found in the appendix.

Vision for MN-RPAC

To derive a vision for MN-RPAC, the committee broke into small groups and discussed these three questions:

In the next three to five years, who do we serve and why?

What is our utopian outcome for MN-RPAC?

What goals and expectations need to be set to obtain the outcome?

Based on their answers the committee came up with the following Vision:

MN-RPAC is THE trusted resource in Minnesota to provide value to the real estate market by supporting elected officials that protect and advance the real estate industry.

Mission of MN-RPAC

To derive a mission for MN-RPAC, the committee broke into small groups and discussed these two questions:

What is the purpose of MN-RPAC?

What actions are needed that we can commit to, to attain the vision?

Based on their answers the committee came up with the following Mission:

Protect, Preserve and Advance private property rights to benefit all Minnesotans by:

- 1. Opening communications and building relationships between REALTORS® and elected officials***
- 2. Educating elected officials on REALTOR® issues***
- 3. Raising Money to elect REALTOR® Champions***

SWOT Analysis

The committee made a list of MN-RPAC's Strengths, Weaknesses, Opportunities and Threats. They are itemized in the following matrix:

Strengths	Weaknesses
<p>Dedicated core leaders/members, relationships with elected officials, Staff, committed members, developed programs, website, NAR, strong mkt place, dollars raised, accountability, momentum, messaging, etc.</p>	<p>Explaining REALTOR Party, getting new members involved, retention, sharing story, messaging, new leadership blood, little training, trustees, budget constraints, burn out, technology issues, apathy, no regional approach, etc.</p>
Opportunities	Threats
<p>Increased engagement, Leverage locals, success stories, build culture, training, teams, untapped participation potential, new tools, events, social media, etc.</p>	<p>IE vs PAC, Dues issues, Corporate Ally Program, Campaign Laws, political ‘turmoil’, money in politics, core group across all levels, market changes, teams, etc.</p>

Goal Setting with Objectives

Fundraising

A. State Goal/NAR Disbursement goal

GOAL: State total dollar goal to be set by trustees annually

OBJECTIVES:

1. A regional fundraising approach. Local fundraising and recognition annual plan set at training event (fall leadership event, etc.), provide funds and/or food to be on agenda; specific worksheet on steps for local to obtain local triple crown.
2. Communications/Publish: spotlight issues, brokerage participation, local association statistics, list of supported officials, video, push website
3. Promote RPAC at events and programs with stickers and asks with use of volunteers
4. Consider and review: having dedicated staff just for RPAC/budget planning/staff time

B. NAR GOALS: MN-RPAC aims to meet or exceed NAR annual goals for MN (Dollar (NAR disbursement) goal, Participation, Major Investor (MI), Presidents Circle (PC)).

NAR goals defined:

1. Disbursement goal – a set dollar amount per member based on NAR’s needs
2. MI goal – 10% of membership or a 10% increase over previous year;
Long-term goal: MI three-year goal (by 2020) 10% of membership (net 80 new MIs as 2017 membership levels)
3. Participation – 37% of membership or five percentage points over the previous year
4. Presidents Circle – 10% of Major Investors

MI & PC OBJECTIVES:

1. MI recruitment event – target \$250-\$999 investors for new MI and some move up MIs for new PC investors – not a recognition event for current MIs
2. ‘Major Producer Ask’ program
3. Events: Pancakes & Politics, Saints Event, Receptions around events
4. Use Higher Logic communications platform
5. New MI event luncheon for new MIs
6. Cooperate Ally program tie together/ see example below
7. Continue to work with Aristotle and NAR legal team on allowing a sustaining investor program
8. Regional Recognition

PARTICIPATION OBJECTIVES:

1. Local association plans & training as described above
2. Create broker competition plans
3. Publication as described above
4. Continue with online fundraising plans
5. Promote at events and programs with stickers and asks with volunteers’ help
6. Signature/logo development
7. Phonebanks
8. Investigate RAMCO and MLS ‘event’ workflow (hard vs soft issue?)

C. Local association goals:

1. Create annual regional fundraising plans with regional ‘representatives’
2. Local triple crown includes: dollars raised, MI, participation

LOCAL ASSOCIATION OBJECTIVES: Follow regional approach as described above

D. Corporate dollars

- a. Grow/recruit Political Advocacy Fund (PAF) investments to make disbursement goal
- b. Work with Corp Ally (CA) (Example: starting with corporate ally investments of \$5K or higher: \$1K MI/\$9K CA=\$10K) (\$5K = \$1K MI/\$4K CA)

CORPORATE DOLLAR OBJECTIVES: Develop annual plan and schedule with MI Council representative and Corporate Ally (CA) Council representative for a joint broker approach.

Disbursements

1. **Decision making**

- a. State Candidate Disbursements:
 - i. The Who: Board of trustees - sets dollar amount for state and local candidate disbursements in annual budget and as needed
 - ii. Do we have local associations submit requests to trustees for state disbursements?
 - iii. How: Trustees will make final disbursement decisions based on the MN-RPAC matrix

RPAC Matrix		
Value		Description
1		Author/Co-Author of MN REALTOR® Legislation
2		Supporter/Advocate for MN REALTOR® legislative positions
3		Chair/Leadership position AND generally supportive of MN REALTOR® priorities
4		Serves on at least one key committee: Commerce, Taxes, Property Taxes, Judiciary, Civil Law, Environment
5		Relationship Building/Open seat

Decision Making OBJECTIVES: Develop system of local association requests for disbursements to state candidates with Trustees making final disbursement decisions based on the MN-RPAC matrix, similar to NAR structure.

- 2. **Election Results GOAL:** It shall be published who MN-RPAC supported at both the state and federal level, including the WHY they were supported (the Matrix/issues), and the process.

RESULTS OBJECTIVE: Publish who MN-RPAC supported in the MN REALTORS® main publication and on the MN-RPAC website including the why and process.

Bylaws

Bylaw Goals & OBJECTIVE:

- a. Conduct an annual review of the MN-RPAC Bylaws
- b. Convene a bylaws work group every three years for a deep-dive to analyze fundraising and disbursement trends, Board of Trustees structure, Role of the Trustees, market place and past results.

Capacity Assessment

Time, Money, People

The Committee's Capacity Assessment focused on the structure of the Board of Trustees.

The 2017 structure of the board:

The Board of Trustees shall consist of up to 23 members including the NAR Federal Political Coordinators. The Board shall consist of the following:

- 8 At-Large members;
- 1 Local Association Executive or Local Governmental Affairs staff;
- NAR Federal Political Coordinators;
- 1 NAR RPAC Major Investor Council Member from Minnesota;
- 1 NAR REALTOR® Party Member Involvement Committee Member from Minnesota
- NAR RPAC Trustees from Minnesota serving as either a RPAC Federal Disbursement Trustee or RPAC Fundraising Trustee;
- 1 NAR RPAC Participation Council Member from Minnesota
- Immediate past chairperson

The Committee discussed at length the role of the Trustees and desired a more involved, participatory Board of Trustees that takes a larger role in fundraising. The committee discussed how the Board of Trustees could be structured to ensure more broad based volunteer involvement going forward. Their proposed structure, to be handled via a bylaws change, would consist of:

The Board of Trustees shall consist of up to 29 members. The Board shall be organized into two categories, based on the length of their respective terms. The Board shall consist of the following:

Category 1: (one-year term)

- 1 Local Association Executive;
- NAR Federal Political Coordinators from Minnesota;

- NAR RPAC Trustees from Minnesota serving as either a RPAC Federal Disbursement Trustee or RPAC Fundraising Trustee;
- NAR RPAC Participation Council Member from Minnesota
- YPN Liaison
- MN REALTORS® Treasurer (for the PAC FY)
- At-Large Seats, as needed for duplication of roles.

Category 2: (two-year term)

- 6 Regional Members, one from each of the 6 geographic regions, established by the Minnesota REALTORS® - terms are staggered by even and odd regions.
- 2 Standing At-Large Seats (Seat#1 and Seat#2)
- Chair, Vice Chair, Treasurer, Immediate past chairperson
- NAR RPAC Major Investor Council Member from Minnesota;
- NAR REALTOR® Party Member Involvement Committee Member from Minnesota

Appendix

Summary of RPAC Surveys

Budgets from 2014-2016

Current bylaws and proposed bylaws