



ACT, INVEST, MAKE AN IMPACT!

THE FUTURE OF REALTOR® ADVOCACY IN MISSOURI

Act, Invest, Make an Impact!

I. Executive Summary

Implementing an advocacy strategy that encourages and supports local boards/associations to build capacity, develops local plans (which includes both acting and investing components) and provides the necessary staffing, training, education and tools will enable the Missouri REALTORS® to reach its objective to become THE most trusted, influential and powerful voice for real estate in Missouri.

Implementation of the Advocacy Plan (“the Plan”) will allow the Missouri REALTORS to:

- Raise the profile of the Association with federal, state and local government officials as THE most trusted, influential and powerful voice for real estate;
- Coordinate consistent and programmatic political activism by members and/or staff at the local, county and statewide levels; and
- Build the REALTOR Party in Missouri.

Key themes that became clear in the development of the Plan and that you will see incorporated throughout include the following:

- ✓ Educate
- ✓ Train
- ✓ Communicate
- ✓ Collaborate
- ✓ Engage
- ✓ Show Value

REPRESENT – This is a key strategic priority from the Missouri REALTORS 2014-2016 Strategic Plan. This strategic priority and the underlying goals can be met by implementing a comprehensive Advocacy Plan as outlined in this Proposal.

Effective advocacy is both Acting (REALTOR Party) and Investing (RPAC). The Advocacy Plan will outline key strategies and objectives to achieve both.

Acting: An important overarching goal of the Plan is to engage members and increase utilization of NAR’s REALTOR Party resources and develop local plans which include critical components such as candidate recruitment and endorsements, elected official engagement, collaboration with other stakeholders and organizations, and volunteerism.

REALTOR Party Utilization by Missouri REALTORS has had mixed success. Some local boards/associations have taken advantage of REALTOR Party resources and benefitted accordingly, while others have not utilized any resources offered.

- In 2012, the total Usage of REALTOR Party programs in Missouri was \$422,285.48 (\$22/member).
- **Based on the \$40/member dues assessment, we are leaving more than \$300,000 (almost \$18 per member) on the table!**
- Although we ranked 9th in the nation (21%) in participation for the recent Mortgage Interest Deduction Call For Action (CFA), our non-participation rate of **79%** shows that we have fertile ground for more effective engagement.

Investing: While the Missouri REALTORS continue to exceed NAR Fair Share, Major Investor and President Circle Goals, we are challenged to reach the unengaged member and thus, our overall participation is lower than desired.

- In 2013, 5,655 members donated a combined \$521,922.00, the highest amount in the last 5 years.
- Our RPAC non-participation rate of **68%** provides ample room for more effective engagement.

See Appendix A for additional historical numbers

II. The Need for a Plan

Missouri REALTORS have had our fair share of advocacy success stories, in large part because of our dedicated members and a realization about the critical role that advocacy plays in our industry and within our Association.

But we can, and need to, do even better. With the Citizens United case that changed the landscape of political fundraising, competing financially will continue to become more and more difficult. We simply cannot raise enough money to compete in this new environment. Strategic and programmatic engagement of our grassroots, and longer term, with consumers with whom our members interact, will be critical to our ongoing success as advocates for the American Dream.

Resources vary at the local board/association level depending on the size of the local board/association, staff and financial resources available. Currently there are 37 local boards/associations of different sizes, only two with full time Governmental Affairs Directors (GADs) (St. Louis and Kansas City), some with super members who “live” for advocacy, some with financial resources and some with none of these. These variables create a challenge when attempting to communicate and build a consistent and programmatic advocacy capacity at the local board/association level. (Please see Appendix for Acting and Investing Key Statistics.)

The goal of this Plan is to build an ongoing program that allows the Missouri REALTORS to better serve members and integrate advocacy efforts more consistently at the local level. It is not a one year project. To prove its effectiveness, leadership must be willing to commit Association resources for several years before determining if the program has met its objectives. A key component of the Plan will be identification of performance measures in which to measure success. (Please see Measuring Success section at the end of the Plan.)

The Plan outlined in this Proposal will tie NAR’s REALTOR Party resources to local boards/associations in Missouri through the State Association - serving as a critical resource to members and local boards/associations.

REALTOR Party resources and RPAC strategies and goals will be integrated in all aspects of the Plan and will be an integral part of local board/association advocacy plan development. Key elements of

REALTOR Party resources include the areas of Community Involvement and Outreach, RPAC Fundraising, Advocacy (Candidate and Issue Campaigns) and Building REALTOR Party Strength.

III. How the Plan was Developed

Development of the Missouri REALTORS Advocacy Plan began earnestly in July, 2013 and included member engagement and outreach, staff discussion and review, outside research and Joint Advocacy Output Group Planning Sessions in September at the Business Conference in Kansas City. Staff and our consultant then took this information and condensed it into this document.

a. Member Engagement Pre-Joint Output Group Planning Session

- Planning meeting held with key advocacy leaders (staff and members)
- Survey sent to local Association Executives and current and future local board/Association Presidents

Local Board/Association Advocacy and Government Relations Survey Highlights

-61 responses from Local Board/Associations (AE/Secretary, 2013 Local Board/Association President or 2014 Local Board/Association President)
-Out of 37 local boards/associations, 32 local boards/associations responded to our survey.

Key highlights from survey questions which relate to training and capacity building at the local board/association level are below:

- ✓ When asked, "what type of future communication you would like to see from the Missouri REALTORS regarding advocacy," responses included:
 - "More simple communication and how it directly affects us at the local level"
 - "Communication should go to all members – not just those involved with an output group"
 - "More regular email updates during legislative session so that we can keep our members informed (not just those that are already engaged)"
 - "Monthly newsletters (at least) during legislative session that I could then forward on to my members at the local level"
 - "Advance talking points for Capital Conference"
 - "We need to get back to basics – hands ON – not just through the internet"
- ✓ When asked, "would local training with you and your board/association would be helpful from an advocacy perspective", a large majority stated "yes".
- ✓ When asked for suggestions on what should be included in local training and an advocacy toolkit, responses included:
 - "The basics – advocacy 101 for members who are not engaged currently"
 - "Training to talk with legislators and local elected officials"
 - "Training on how to identify/track local issues and develop a plan to engage more at the local level (This is a big challenge at the local level, as many have identified they don't have the resources (time/staff/knowledge) to do this.)"

- “How to engage members in our efforts”
- “The specific role REALTORS® can play – the WHY”
- ✓ Training state coordinators (or restructuring the program altogether) so it’s an ongoing relationship – not just at Capitol Conference.
- ✓ 81.8% indicated they would attend media training if offered. (36 responses)

Key highlights from survey questions asked regarding REALTOR Party resources are below:

- ✓ Nearly ½ of Respondents (45.8%) do NOT understand all of the resources available through the REALTOR Party.
- ✓ When asked whether their local board has taken advantage of programs that the REALTOR Party offers, 41.3% answered “no”.
 - The most common reasons given were:
 - No time
 - No staff
 - Don’t see the value. Lack of interest of members. Uneducated.
 - Lack of volunteers willing to commit

Additional member engagement:

- Survey sent to State Coordinators
- Conference call and additional follow-up with GADs from the St. Louis Association of REALTORS® and the Kansas City Regional Association of REALTORS®
- Conference call with Output Groups (83.7 and Political Outreach)

b. Research

Research was conducted internally to assess the effectiveness of historical programs (i.e. what was working and what was not). External research included outreach to:

- NAR – to determine what resources were available, and additional background on effective programs and tools.
- Other state REALTOR associations to look at best practices and effective advocacy and government affairs models. States researched included:
 - Texas
 - Oregon
 - Illinois
 - California
 - Wisconsin
 - Utah
 - Florida
 - Maryland
 - New Jersey

- Michigan
- South Carolina
- Delaware
- Other non-REALTOR national and statewide associations to look at best practices and effective advocacy and government affairs models.

c. Advocacy Planning Session

Joint planning sessions of the Political Outreach Output Group and the 83.7 Output Group were held at the September Business Conference. The purpose of these joint sessions was simple: to garner input to ensure that our strategy and plan are well-aligned for maximum effectiveness.

Key strategic priority areas and goals were identified and prioritized and were reaffirmed by the Advocacy Committee. Key strategic priority areas include:

- **Member Engagement**
- **Training and Capacity Building at the Local Board/Association Level**
- **Collaboration, Community Involvement and Coalition Building**
- **Consumer Outreach – Extending the REALTOR Brand**
- **Data, Research and Information**

IV. Missouri REALTORS Strategic Advocacy Plan

The Plan is broken out into five key strategic priority areas, which include the top goals for each strategic priority area during the Plan's initial implementation, along with the objectives for each goal. The specific tactics to carry out the objectives will be developed over time. The goals are not meant to be limiting but rather to create a near-term focus for the Plan.

Strategic Priority: Member Engagement

To effectively engage our members in the Missouri "Act, Invest, Make an Impact!" advocacy culture, we must demonstrate to them a value proposition ideally beginning at the time each member becomes a REALTOR.

Strategic Goal: Demonstrate the impact that REALTOR advocacy has on individual REALTOR business, the real estate industry and consumers.

- **Objectives:**
 - Develop a member-focused advocacy and communication strategy that is integrated into the Missouri REALTORS overall communications plan and can also be distributed to local boards/associations. This will allow us to enhance our members' awareness of issues through multiple channels, including face to face interaction as well as the expanded use of THE LANDING and other reliable electronic communications. Communication strategy will be developed with input from advocacy staff and consultant, communications staff and the pertinent Output Groups.
 - This communication strategy will include:
 - Key talking points on advocacy successes
 - Key talking points on RPAC successes
 - A "What if we don't do advocacy" piece
 - Advocacy 101 presentations which Regional Advocacy Coordinators (described below) and others can present to local boards/associations, etc. on the value of advocacy and the importance of acting and investing.
 - Increased advocacy presence on the Association's websites, utilization of social media for reporting advocacy success in real-time and text messaging for calls for action and other pressing action alert requests.
 - Key messages on the value of INVESTING in RPAC for local boards/associations to utilize as a part of their "dues-check off" effort.
 - Develop an advocacy and an RPAC "value" flipcard.
 - Develop an advocacy e-newsletter:
 - To be distributed monthly during legislative session (January – May) with content developed by our Chief Lobbyist.

- Additional e-newsletters distributed in August and November with content developed by the advocacy team.
- Develop a series of short and engaging videos
 - Clips to be captured at Capitol Conference on “the impact of advocacy” and a call to action.
 - Focus on success stories and personal testimonials/importance of investing/showcase legislative wins.
 - Chief Lobbyist will provide updates during legislative session including an end of session wrap-up video.
- Develop an annual advocacy/RPAC report to highlight advocacy/RPAC successes, which will recognize and thank our REALTOR champions who have acted and invested throughout the year.

Strategic Goal: Advocacy exposure at new member orientation and brokerage events

- **Objectives:**
 - Develop talking points on the value of advocacy for new members that can be incorporated into local boards/associations’ new member orientations.
 - Outreach to new members as they join throughout the year, encouraging them to complete the RAP Index survey to identify existing relationships they may have with elected officials and/or other key partners. (See attached background documents on RAP Index.)
 - Implement the Broker Involvement Action Plan. (See goal below.)

Strategic Goal: Development of a Broker Involvement Action Plan

- **Objectives:**
 - Expand elements of “Be the Better Half” Broker Challenge statewide.
 - Regional Advocacy Coordinators (Described below):
 - Visit large broker offices at least once a year.
 - Develop and implement regional presentations for smaller broker offices once a year.

Strategic Priority: Training & Capacity Building at the Local Board/Association Level

In order to accomplish the Missouri REALTORS Strategic Plan, we must leverage the collective strength of our grassroots advocates. This can best be done through leveraging local board/association presence and raising the level of member support and guidance at the local level.

Strategic Goal: Share regional advocacy staff funded by Missouri REALTORS

○ Objectives:

- Implement a Regional Advocacy Coordinator (“RAC”) structure where the state is divided into three regions with a RAC assigned to each region to work with local boards/associations.

This objective rose to the top in our research for this plan, as well as input from members both through our survey and at the joint output group planning session. This is a critical component for the success of the Plan moving forward.

Currently, there is a very limited staff dedicated to local board outreach. With 37 local boards, in order to effectively train and build capacity for advocacy at the local level, as well as meet Advocacy and Investing goals, three RACs should be retained.

RACs would be full-time Missouri REALTORS staff reporting to Erin Hervey, Vice President, REALTOR Party and Local Board Relations.

Regions would be divided into an Eastern, Central and Western Region, with each RAC responsible for certain local boards/associations. (See attached map.) The assumption would be that the Eastern RAC would reside in St. Louis; the Central RAC would reside in Mid-Missouri and the Western RAC would reside in Kansas City. Regions were developed based on various criteria including, without limitation: size of local board/association, geographic location and number of brokers.

The RAC job descriptions and performance measures would include the following:

Advocacy

- Assist local boards/associations with:
 - Development and ongoing performance of a local advocacy plan to include greater grassroots outreach and tracking the results in order to analyze progress.
 - Recruitment and identification of REALTORS with existing relationships with both local and state elected officials to provide local boards/associations and our Chief Lobbyist with advocates who can take action when needed on critical issues facing our industry.

- Coordination of and obtaining REALTOR attendance at local and state legislative events, including town hall meetings, roundtables and other pertinent meetings as needed.
 - Strategy to support/oppose local legislation as needed, including assistance with writing and submitting REALTOR Party Grants where applicable.
 - Identification of available 3rd party partnerships and collaborations in local communities to strengthen the REALTOR brand.
 - Identification of REALTOR Party Candidates and assistance in ensuring REALTOR Party Candidates are elected.
 - Assist local boards/associations with writing and submitting REALTOR Party Grants as opportunities arise.
 - Providing local boards/associations strategic guidance on local issues, including assistance with securing lobbying resources and issues funding from both the Missouri REALTORS as well as the NAR (the RAC will not be a local lobbyist).
- Promote and increase attendance at Missouri REALTOR Advocacy Events including Capitol Conference. (Note: As a part of assisting local boards/associations with the development of their local advocacy plan, a participation goal for Capitol Conference will be identified and assistance provided.)
 - Provide an immediate conduit to the Missouri REALTORS' Chief Lobbyist and advocacy staff with knowledge of legislation, policy and political opportunities/challenges at the local level.
 - Increase Call for Action Participation – at least 30% statewide participation rate with each local board/association setting its own goal as a part of their local advocacy plan.

Investing

- Assist Association Executives and local RPAC Chairs with building a RPAC culture (including hard and soft dollars) to increase investments including assistance with development of their Plan.
- Coordinate check presentations with local boards/associations for local elected officials.
- Represent the Missouri REALTORS at local RPAC meetings/events.
- RPAC events: Identify available REALTOR Party Grants for RPAC events and write and submit where applicable.
- Work with local boards/associations to increase statewide participation to 40%, with each association/board setting its own goal as a part of their local advocacy plan.

- Help identify and cultivate potential Major Investors/President Circle Members as well as solicit return investors.
- Assist with statewide advocacy fundraising events.

General

- Communicate with the Missouri REALTORS advocacy staff with regular phone calls, travel schedule, and weekly reports.
- Track and report into a comprehensive advocacy database any events, opportunities, legislative activity or member input which can assist in (a) building a public record on our issues that are part of our legislative agenda and/or (b) improve the image of the Missouri REALTORS.
- Represent the Missouri REALTORS at NAR's Governmental Affairs Institute, Mid-Year Meetings and/or other pertinent industry meetings.
- Attend all Missouri REALTORS Business Conferences; provide a report to the Advocacy Committee and its Output Groups and other venues where appropriate.
- Visit each local board/association at least once a quarter.
- Develop an action plan for communicating with broker offices and assist with implementation of the Broker Involvement Plan (See objective above). This may include:
 - Visiting larger broker offices once a year.
 - Developing and implementing regional presentations (which would occur in regions throughout the state) for smaller broker offices once a year.
- Interaction with NAR REALTOR Party Consultant.
- Ongoing interaction and quarterly conference calls with Missouri REALTORS who sit on key NAR committees including:
 - REALTOR Party Member Involvement Committee
 - REALTOR Party Trustees for State and Local Campaign Services
 - RPAC Participation Council
 - RPAC Fundraising Committee
 - RPAC Trustees
 - RPAC Fundraising Forum
 - Major Investment Council

Strategic Goal: Develop a Local Advocacy Plan Template/Toolkit, similar to the Federal Political Coordinator Program, which can be adopted and utilized for state and local advocacy efforts.

- **Objectives:**
 - Develop a local advocacy plan template, manual/toolkit and training program with the goal of rolling out the plan template at Capitol Conference. (Local advocacy plan template, planning process and training

program will be developed by the Advocacy Consultant, working with advocacy staff. See Appendix for the Role of the Advocacy Consultant.) The planning process will include identifying as a part of the local advocacy plan REALTOR Party programs, tools and events which can be utilized at both the state and local level. The RACs will then help identify and fill out grant forms for local boards/associations.

- Utilize RAP Index to identify key relationships to incorporate as a part of the advocacy plan. RAP Index is a data mining system that allows users to identify relationships with elected officials and key stakeholders and identify the quality of the relationship.

This tool has been successfully utilized by other associations and organizations to identify key relationships with elected officials and organizations, as well as PAC development. (Please see an overview of the RAP Index and what it can do for us in the addendum to this Plan. We have spoken to the RAP Index team as well as with the Minnesota Association of REALTORS who successfully utilized this program over the past year and was highlighted at this year's NAR GAD Institute.)

This tool will assist our Chief Lobbyist in identifying relationships which can be leveraged with state legislators, as well as assist local boards/associations in identifying and leveraging relationships with local elected officials, other key stakeholder organizations and local key influencers.

- Restructure the current State Coordinator Program.
 - Develop a new Local Legislative Contact Team Program (organized by state senate districts). There will be a Legislative Contact Team Leader and then other members of the team recruited and trained at the local level to identify both state legislative relationships, as well as local relationships.
 - Key relationships will be identified through local board/association outreach as well as through the RAP Index.
 - A training toolkit for Local Legislative Contact Teams will be developed. This will include:
 - Responsibilities of Local Legislative Contact Team
 - A "how to develop year-round relationships with elected officials" guide
 - Do's and Don'ts on building relationships with local and state elected officials

- A key goal of this approach is for legislative teams to develop year-round legislative relationships, versus a one-time meeting with a legislator at Capitol Conference. This will help our Chief Lobbyist identify opportunities and further leverage relationships with state legislators.
- Implement an annual Missouri REALTOR Advocacy Training Conference beginning in October 2014. Members would develop their 2015 local advocacy plans and additional training/capacity building sessions would be held.

Strategic Priority: Collaboration, Community Involvement and Coalition Building

In order to develop an effective advocacy plan and program, collaboration, community involvement and coalition building must be a priority. With limited resources and the political challenges ahead for our industry, partnering with other like-minded associations and organizations and leveraging the power of those relationships will be critical.

Strategic Goal: Identify liaisons from local boards/associations to Local Chambers, Rotary Chapters, Economic Development groups, City Councils, etc.

- **Objectives:**
 - Develop as a part of the local advocacy plan a list of key local stakeholder organizations. Identify liaisons from each local board/association who belong to key local organizations. This can be done through the RAP Index process, as well as outreach to local members one-on-one. Connections with members need to be assessed (relationships with community members and influencers/relationships with legislators). Key legislative relationships and activities identified at the local level will be communicated with our Chief Lobbyist.
 - Develop key talking points and a presentation about Missouri REALTORS' advocacy efforts that local liaisons can share with other local stakeholder organizations. The goal is to have a REALTOR presence in the community with other key organizations. The liaison can share information with these organizations and also bring back key information that may affect REALTORS to the local board/association.
 - Develop as a part of the local advocacy plan opportunities for local liaisons to engage further with local stakeholder organizations (e.g. Invite key local organizations to local REALTOR events, rotate members to attend city council meetings, etc.).

Strategic Goal: Networking and collaboration with other like-minded associations (non-REALTOR®) and leveraging existing business relationships (chamber, neighborhood associations, etc.) to broaden the value proposition to consumers.

- **Objectives:**
 - Missouri REALTORS collaboration: Develop a list of the top 10-15 organizations the Missouri REALTORS should develop formal partnerships with to leverage advocacy efforts.
 - Local Board/Association collaboration: As a part of the local advocacy plan, identify key stakeholder organizations which each local board/association should engage with and which local liaisons could cultivate for potential partnership opportunities.

Strategic Goal: Missouri REALTORS to be the clearinghouse for local boards/associations to share information/resources for local issues

- **Objectives:**
 - Develop a local board/association issue identification/resource template which local boards/associations can complete to share information about local issues. This information will be shared with advocacy staff.
 - Utilize THE LANDING where local boards/associations can share important policy issues that are happening in local communities, as well as resources and information.
 - As part of the new advocacy e-newsletter, create a consistent place where hot button local issues are identified and information is shared.

Strategic Priority: Consumer Outreach – Extending the REALTOR Brand

We cannot achieve long term advocacy success alone. NAR’s consumer outreach strategy is still in its early stages and there will likely be ways to leverage NAR’s strategy at the state level. At the same time, we need to start building a consumer facing online presence that will provide a foundational element to this brand extension.

Strategic Goal: Make NAR and Missouri REALTORS advocacy resources more user friendly and shareable with non-REALTORS

- **Objectives:**

- Launch new website specifically targeted to spreading Missouri REALTORS' advocacy message to non-REALTORS.
- Leverage the collective networks of social media-minded members who want to help spread the Association's advocacy word through a program designed to reward social sharing.
- Leverage available resources produced by NAR in its consumer strategy. Review existing NAR resources and determine what can be incorporated into Missouri REALTORS overall communications plan to advocate for homeownership. Develop templates to share via multiple communication channels (social media, newsletters, press releases) that REALTORS can utilize, and address to consumers, not just REALTORS.
- Consistently deliver relevant PR material through trusted media outlets and start to establish key media relationships.
- Develop advocacy videos which are consumer-focused and distribute through various communication channels. Make available for individual brokerage companies to brand and distribute.
- Ensure Chief Lobbyist continues to monitor legislation and/or policies/regulations that are important to the Association and could impact not only REALTORS, but consumers as well.

Strategic Priority: Data, Research and Information (Longer-Term Strategy: Begin in 2015)

Currently the Missouri REALTORS provides monthly housing statistics by way of a video, written report and press release. We must become 'top of mind' to any government official or organization when they look for issues-related real estate statistics.

Strategic Goal: Enlighten public on the need to use REALTORS® – prove REALTOR information is accurate information vs. others.

- **Objective:** Develop as a part of the overall Missouri REALTORS communications plan, a "trusted voice" component about REALTORS® being the "trusted" voice. Focus on the "trust" component and push out key information through social media, video testimonials, and talking points provided to local boards/associations.

Strategic Goal: Prepare and distribute to government officials and 3rd party organizations relevant data on key advocacy issues and emerging real estate related issues (Fair Tax, Green Issues, Property taxes relate to education).

- **Objective:** Aggregate and publish reliable information about the Missouri real estate industry and its impact on our statewide economy. Reports and data may include discussion papers, policy briefs specific to real estate issues as well as broader public policy goals dealing with economic development infrastructure and building a better state. This will require the hiring of a data specialist or outsourced

organization who can work with third party organizations and publicly available data.

- **Objective:** Chief Lobbyist provides insight on key legislative and regulatory emerging issues as they arise.

IV. Output Group Structure recommendations

In order to align with the Plan as outlined above, it is recommended that the existing CFA/BIP, Advocacy Fundraising, 83.7 Output Group and Political Outreach Output Groups be restructured. The new Advocacy Committee Output Groups would be:

- Advocacy Action Output Group
- Advocacy Investment Output Group

The specific roles/responsibilities for each Output Group would be developed once this Plan is approved and it is assumed that each Output Group would appoint task forces to address various elements of this Plan.

V. Additional Key Advocacy Components

Capitol Conference

We are recommending some changes to the Capitol Conference format for the 2014 Capitol Conference. Please see the attached Capitol Conference Overview and Budget.

VI. Resources Required

Please see attached Budget which outlines the resources required to implement the Plan through 2014 as outlined above.

VII. Measuring Success (Performance Measures)

A key component of the Plan will be identifying both quantitative and qualitative performance measures in order to effectively gauge short and long-term success. The Plan is a living breathing document and developing specific performance measures will allow us to continuously monitor, evaluate and adjust when necessary in order to achieve measurable goals. These goals will be developed immediately as a part of developing the detailed implementation plan. The Advocacy Consultant will lead advocacy staff and pertinent Output Groups through a performance measurement identification process as a part of the Plan.

The performance measures identified will:

- allow us to measure inputs, outputs, and outcomes over time; and
- develop benchmarks to be able to accurately assess progress and success by comparing pre-Plan to post-Plan comparisons.

Although we currently have certain benchmarks that already exist and are outlined in the Plan, there are other benchmarks that don't exist. As a part of the Communication Department's planning process, we will be identifying and developing benchmark questions

for the Advocacy Plan and including in their Research (Focus Groups and Statistically-Valid Member Survey) so that we can gain some additional benchmark/baseline data.

APPENDIX A

ACTING AND INVESTING KEY STATISTICS

ACTING: REALTOR Party

REALTOR Party Utilization by Missouri REALTORS has had mixed success.

- ✓ Some local boards/associations have taken advantage of REALTOR Party resources and had success, while others have not utilized any resources offered.

In 2012, the total Usage of REALTOR Party programs in Missouri was \$422,285.48

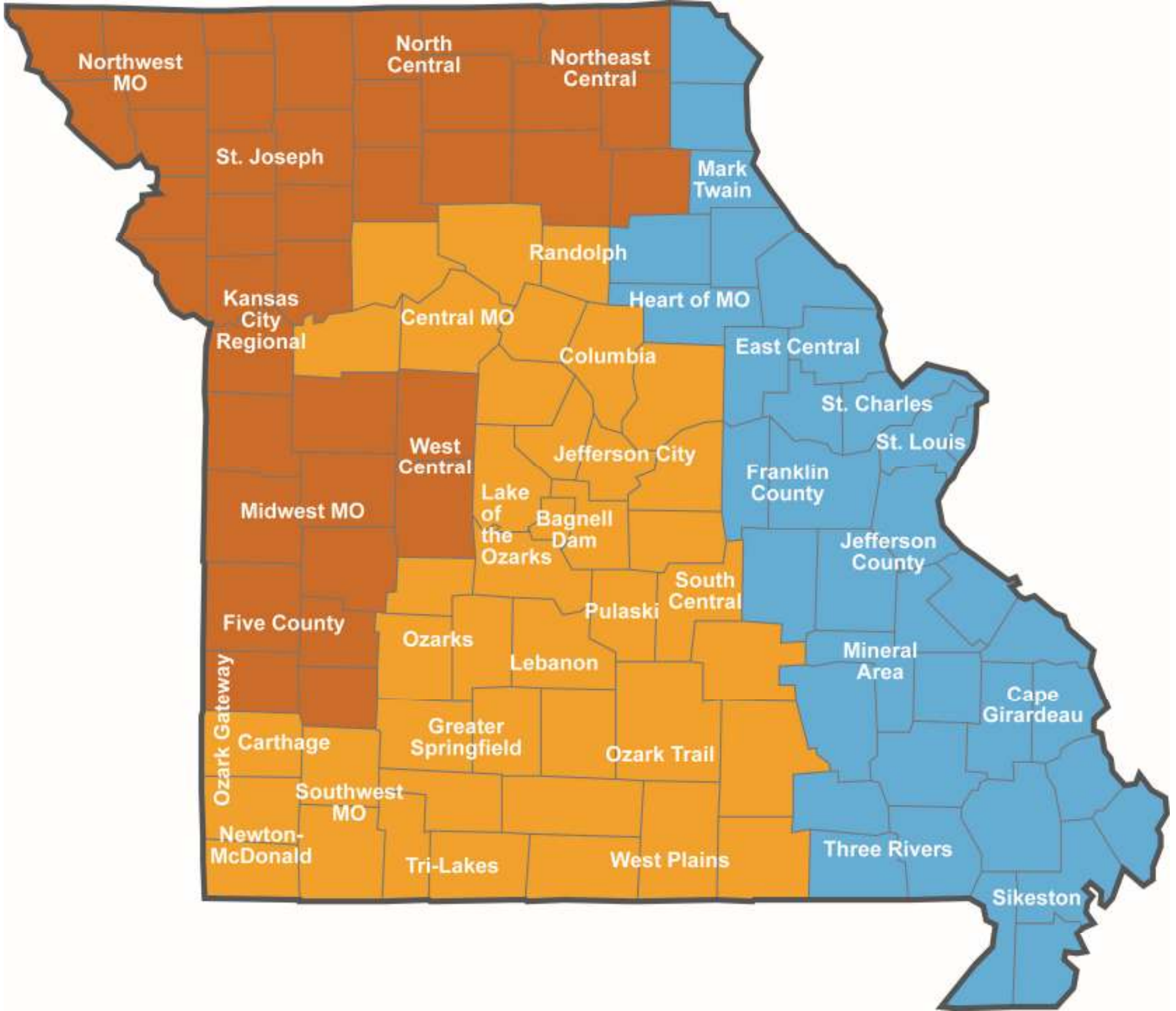
- ✓ Total usage by local boards/associations: \$158,612.32
(24 out of 37 local boards/associations utilized REALTOR Party resources in 2012.)
- ✓ Total usage by Missouri Association: \$263,673.16
- ✓ Dollars per member value delivered = \$22.22
- ✓ Dollars per member paid to NAR = \$40.00

We are leaving more than \$300,000 (almost \$18 per member) on the table!

INVESTING: RPAC

RPAC - 2013

- ✓ 5,655 members donated a combined \$521,922.00.
- ✓ 32% member participation (25 out of 37 local boards/associations met the NAR 37% participation goal)
- ✓ 190 Major Investors
- ✓ 28 President's Circle Members
- ✓ Calls for Action goals met
- ✓ 27 of our 37 local boards/associations met their fair share amount (\$15 per member goal)





2014 Strategic Advocacy Plan Report

1st Quarter Highlights

In just a few short months the Missouri Advocacy Strategic Plan has gone from being a well-researched concept to a true working multi-faceted approach to ensuring Missouri REALTORS becomes the most trusted, influential and powerful voice for real estate in Missouri.

The Missouri REALTOR Party Team enjoyed great success in our first few months and identified areas in which we can improve. As this is a living, breathing plan, we must continually learn, adjust and adapt to make our plan even better. Below is a summary of Q1 goals which include both our accomplishments and challenges.

Hired two new Regional Advocacy Coordinators and transitioned Adam Davis into the third Regional Advocacy Coordinator



MICHAEL RILEY

WESTERN REGION



ADAM DAVIS

CENTRAL REGION



JARED SHAPIRO

EASTERN REGION

By the beginning of February, we had hired two new staff members and re-assigned Adam Davis to form our three person Regional Advocacy Coordinator (RAC) team. The RACs were immersed in training in early February, both as to the Missouri REALTOR advocacy strategy and culture as well as to get acclimated to our internal staff environment. We also negotiated leases with the Kansas City Regional Association of REALTORS and the St. Louis Association of REALTORS where Michael Riley (KCRAR) and Jared Shapiro (SLAR) will office when not on the road. This is a huge step to helping to continue building working advocacy relationships with our two largest local associations.

January 15 Capitol Conference

- 325 Capitol Conference Attendees
 - 75 Legislative thank you notes were sent from members.
 - 256 Legislative Visit Report Forms were submitted by members.
 - Members reported being more informed than before due to posts on The LANDING containing videos and talking points.

Coordination and Communication with Local Boards/Associations

- Initial visits with Local Boards/Associations (see handout)
 - 33 of 37 Local Boards/Associations had in person meetings with their Regional Advocacy Coordinators (RACs) in Q1.
 - In Local Boards/Associations that lack an Association Executive (AE), it has been difficult to establish a rapport with members.
 - Sentiment still exists in some Local Boards/Associations that advocacy efforts will create more work for AE.
- Utilization of REALTOR Party Resources
 - Eight Coordinated Candidate Campaign Grants were requested by Local Boards/Associations and approved in support of candidates running for municipal offices.
 - Kansas City Regional, Ozark Gateway and West Central had never before applied for a Coordinated Campaign Grant.

Region	Association	Candidate	Office
West	Kansas City Regional	Roxann Thorley, REALTOR	Independence City Council
Central	Ozark Gateway	Mike Woolston, REALTOR	Joplin City Council
East	St. Charles County	Dave Hinman	O'Fallon City Council
East	St. Charles County	Rose Mack	O'Fallon City Council
East	St. Charles County	Mary Ann Ohms	St. Charles City Council
East	St. Charles County	Rick Stokes, REALTOR	Wentzville Board of Aldermen
East	St. Charles County	Karen Vennard, REALTOR	Lake Saint Louis Board of Aldermen
West	West Central	Josiah Town, REALTOR	Clinton City Council

- Many local candidates do not wish to file a campaign committee with the Missouri Ethics Commission, making us unable to utilize grant resources.
- In many cases, Local Boards/Associations are apprehensive about supporting one local candidate over another.
- For the first time, Three Rivers and East Central applied for and received Issues Mobilization Grants to support ballot initiatives being driven by the largest

school districts in their Board/Association.

Region	Association	School District	Ballot Initiative	Grant Amount
East	Three Rivers	Poplar Bluff R-1	Our Community, Our Future	\$9,900
East	East Central	Lincoln County R-3	Proposition KIDS	\$9,400

- Local Boards/Associations that utilized grant resources in Q1 learned firsthand how Missouri REALTORS staff can assist in the process.
 - The LANDING posts by Kim Cox, Ozark Gateway and Lucas Edington, Three Rivers vocalized this to all members.
- RPAC Fundraising Grants were awarded to five Local Boards/Associations as well as Missouri REALTORS this quarter. Staff will be working with more Local Boards/Associations to complete fundraising grants in Q2.

Association	Grant Amount
Bagnell Dam	\$5,000.00
Greater Springfield	\$750.00
Missouri REALTORS	\$5,000.00
St. Louis	\$5,000.00
Three Rivers	\$700.00
West Central	\$3,500.00

- Local RPAC Fundraising Plans
 - 22 Local Boards/Associations submitted RPAC Fundraising Plans/11 will receive a stipend for Missouri REALTOR Business Conferences.
- Local Advocacy Plans
 - RAP Index Survey was deployed on Friday, March 28. As of April, 434 surveys have been completed with an additional 99 in progress. So far, a total of 958 relationships have been identified.
 - During Q2, staff will work with Local Boards/Associations to utilize this information to build out their advocacy plan.
 - During Q3, staff will utilize RAP survey information to build a new State Contact Legislative Team.
 - The Inaugural Missouri REALTOR Party Act, Invest Make an Impact Advocacy Conference will be held on Monday, October 27. Planning has started and more details will come.

Member Engagement and Communications

- REALTOR Party Newsletter

- Inaugural Edition of the Missouri REALTOR Party News launched on Friday, March 7 with a 16.4% open rate.
- April newsletter will launch on Friday, April 7.
- Staff is working to create an Advocacy specific microsite.
- Social Media Utilization
 - Utilization of social media regarding our advocacy efforts has proven to be effective and successful.
 - Posted pictures of staff, detailing their Local Board/Association visits have reached 4,106 people through Facebook posts and gained 119 new page likes on corresponding days of posts through March.
 - Staff also utilized Twitter and The LANDING to connect with REALTORS across Missouri to highlight events and successes.

Broker Engagement

- Broker visits - Started in Q1 - Continuing through Q2: Staff will visit Brokers from the 3 largest offices in every Local Board/Association.
- A draft of the Broker Involvement Challenge has been developed and will be finalized at April Business Conference, with input from Output Groups, and implemented in Q2. See Advocacy Investment Output Group bullet point for more details.

President's Cup

- AEs, Board Presidents, Advocacy Investment Output Group and RPAC Trustees receive a monthly report detailing where they are in respect to each RPAC goal (see handout).
- Advocacy Goals are on track to be met.
- Staff will closely monitor future NAR Calls for Action. There have been no Calls for Action that count towards President's Cup so far this year.
- Major Investor Jacket program helped exceed Major Investor goal with 182 pledges thus far.

Output Group Coordination, Communication and Engagement

- Advocacy Action Output Group
 - Established four Advocacy Strategic Plan Priority Area Workgroups and attempted to hold conference calls. Conference calls were poorly attended. After receiving member feedback, we are restructuring this process to include a

survey to gather input on performance measures and benchmarks for success from members.

- Relationships identified through RAP index will be used in Q2 and Q3 to build local advocacy plans, state coordinator program and Capitol Conference.
- Advocacy Investment Output Group
 - A Workgroup was formed regarding the Marge Pfaff Memorial RPAC-MO Auction. More than 60 Items have been collected.
 - Staff obtained a \$5,000 Fundraising Grant for the Auction, which brings our sponsorship total to \$12,200.
 - The Output Group will review a proposal from staff at April Business Conference to launch a Second Annual Broker Challenge to increase RPAC Participation. This program is built from successes and lessons learned from our 2013 “Be the Better Half” Challenge that took place amongst our four largest Local Boards/Associations. This challenge will be statewide and will include all offices with 10 or more agents.

While the Strategic Advocacy Plan remains an aggressive plan, Missouri REALTORS has positioned itself to achieve great success in 2014. The innovative work we are doing in the area of advocacy will be a model for other state associations.