



# 2024-2026 STRATEGIC PLAN



**Presented by:**

Cliff Long, RCE CIPS

*Chief Executive Officer*

Orlando Regional REALTOR® Association

Amanda Ornelas

*Chief Operating Officer*

Orlando Regional REALTOR® Association

## Executive Summary

**Presented to:**

Jessica Coates  
Sacramento Association of REALTORS®  
2003 Howe Ave  
Sacramento, CA 95825

### OUR VISION STATEMENT

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We aspire to lead and serve the Greater Sacramento region as an indispensable partner and preeminent resource for the real estate industry.

### OUR MISSION STATEMENT

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The Mission of the Sacramento Association of REALTORS® is to support members' success while enhancing communities and advocating for private property rights.

## 2024 -2026 Strategic Plan | Introduction

### THE SACRAMENTO ASSOCIATION OF REALTORS® STRATEGIC PLAN

The Board of Directors and Staff of SAR developed this strategic plan with assistance from Strategic Planner, Cliff Long. It provides The SAR with a three-year roadmap for support, services and organizational development. The Board of Directors and staff will review progress quarterly and will review and update the plan annually as needed.

This plan was developed with surveyed involvement from the membership and guidance from the Board of Directors and staff. The Strategic Planning Committee included board members and staff on the management team. This Committee, including past presidents of the board met to reflect on the mission, vision, core operating values and assumptions underlying the organization's approach to its work and the future of the industry. This meeting was the setting for a work session of the full Board of Directors during which time the organization's strategic direction was defined. The staff and planner helped coordinate the planning process and provided important support and analysis to complete this plan. This meeting was the setting for one session on the date of September 11, 2023, during which time the strategic direction was defined.

# Engineering Success

## BACKGROUND AND HISTORY

Sacramento Association of REALTORS® (SAR) was founded in 1908 as the Sacramento Real Estate Board. SAR would later gain membership in the National Association of REALTORS® in 1918. SAR is in Sacramento, California and is chartered by the National Association of REALTORS®. According to the membership totals from the National Association of REALTORS®, SAR membership totals consist of 7,475 members who identify themselves primarily as residential agents and brokers with a growing commercial influence.

Today, The SAR is a recognized member of the National Association of REALTORS® and the California Association of REALTORS®. SAR provides support and services annually to several thousand REALTORS® and Affiliates throughout the entire state of California through primary and secondary membership. SAR is one of California's more active associations. Its government affairs advocacy and RAF fundraising capabilities are second to none and known statewide.

The SAR supports and services residential real estate, commercial real estate, education, and advocacy. SAR is an Equal Opportunity Employer with a diverse staff led by CEO, Jessica Coates.



## Direction and Results

The strategic direction and goals included in this plan are SAR's response to its understanding of what its members value most about their organization, and current opportunities and challenges to the industry and the desire to receive high quality support from their association.

The three-year period of this strategic plan will be a time of assessing and deepening SAR's approaches to its work. In alignment with this plan, the SAR will take more of a leadership role in working with a broader array of community resources, and it will explore actively engaging more volunteers.

With a fresh perspective on its mission, understanding what it does well, and the environment in which it operates, The SAR will pursue the following core strategic directions:

1. The SAR will create a Value Proposition which clearly outlines the strengths, benefits, and advantages of membership within the REALTOR® Association. This Value Proposition will be continually updated and disseminated to SAR membership in perpetuity.
2. The SAR will further its education opportunities with a renewed focus on professionalism and technology. This focus will serve as the basis for expanding members' knowledge of relevant communications platforms and business delivery systems.
3. The SAR will focus on Member participation. Member Participation with a focus on recruiting new members into volunteering will be a key area necessary to protect the growth and stability of SAR.
4. The SAR will improve communications, member to member, member to Board, member to consumer.
5. The SAR will renew its commitment to serving the industry through the REALTOR Action Fund contributions and advocacy. SAR will focus on growing its base of major donors focusing on those members who currently contribute to both RAF and to individual political candidates.

## GOALS



**The following goals for The SAR over the next three years are the organization's response to current industry issues identified both in the survey and in-person planning session. These goals provide a roadmap for fulfilling the strategic direction.**

## Direction and Results (cont.)

### HUMAN RESOURCES

To achieve these lofty goals, SAR will continue to seek to remain competitive regarding staff salary and benefits. SAR will closely monitor staff workload to determine when additional staff will be necessary to hire.

SAR is committed to a safe, non-hostile workplace environment.

SAR will develop a stable, highly qualified, and motivated workforce that actively delivers the organization's mission.

### OBJECTIVES

1. The SAR will improve its capacity to attract and retain qualified direct care staff.
2. All staff thoroughly understand the meaning of the mission and how their job contributes to achieving it.
3. A professional development program (RCE, CAE) is implemented to strengthen and expand the supervisory and management capacity of staff.

### RESOURCE DEVELOPMENT

The SAR will be a highly visible, well-respected, not-for-profit organization that attracts increased numbers of volunteers and higher levels of contributions to support operations and political involvement.

Successful implementation of this strategic plan will result in more quality support and services delivered to both members and consumers.

### ORGANIZATION OF THE STRATEGIC PLAN

As noted above, this strategic plan is intended to be a management tool for SAR. This plan has two purposes. First, it presents the most comprehensive compilation of the plan and its component parts. It is a record of the strategic planning process undertaken by the Board of Directors and the decisions reached by the Board of Directors as offered by member survey and group input. Second, it is a reference guide for strategic planning. In each goal section a box indicates a goal and an initiative. There are also action items dictating where physical efforts and finances will be focused. The SAR may choose to produce or request from the facilitator a summary version of the plan for distribution to its membership and other stakeholders.

## GOAL 1: Enhancement of Non-Dues Revenue

### A. Real Estate Investment

- Create a real estate strategy and consider investing in real estate.

### B. Revamp Existing Office Space

- Utilize all space in your office to enhance non-dues revenue.
  - Re-imagine the Realtor store.
  - Utilize unused or underutilized spaces to make money.

### C. Create For-Profit Corporations

- Be creative and bold in creating for profit corporations that provide alternative revenue sources.

## GOAL 2: Leverage Data and Technology

A. Develop AI platforms across all aspects of SAR.

B. Creation of Technology PAG/Committee to study all areas of technology at SAR and MLS

C. Use technology to offer and enhance educational offerings.

D. Create processes and streamline optimized systems to enhance productivity association-wide.

## GOAL 3: Enhance Association Influence

### A. Create favorable political climate for real estate

- Creation of publication to be distributed to local authorities.
  - Distribution of "On Common Ground."

### B. Influence Regulation

- Creation of think tank to include members and policy makers.
  - Seek grant funding for think tank.

### C. Public Relations

- Hiring of PR firm tasked with media appearances of president.
- Consider a one-time assessment for the creation of Marketing Campaign.

## GOAL 4: Global Real Estate

- A. Create a global committee or council.**
  - Develop global strategies
- B. Teach/educate members about doing business internationally.**
  - Give programming around how to do business in other parts of the world.
  - Provide programming for those who are buying in Sacramento.
- C. Research data about who is buying in Sacramento from an international origin.**
- D. Research inbound and outbound trade shows that best suit your strategy.**
  - Sacramento can utilize multiple options on getting in front of potential buyers and investors into the area.
  - Outbound trade shows are when you travel and set up booths to let people know about the area and the ability to purchase there.
  - Inbound trade shows are when you bring people from targeted areas outside the US and bring them to Sacramento for specific opportunities.
- E. Become an official NAR Global ambassador association to an international association.**

## GOAL 5: Advocacy - Realtor® Action Fund

- A.** Increase RAF Contributions Year over year by 3%
- B.** Increase RAF Major Donors year over year by 3%
- C.** Host at least 1 RAF Fundraiser annually to increase advocacy
- D.** Advocate for 100% leadership and committee participation in RAF
- E.** Increase REALTOR® voting by hosting GOTV Campaigns

## Antitrust Policy

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It is the policy of the Sacramento Association of REALTORS® to comply with all state and federal antitrust laws. The Association will not condone any discussion of price fixing, commission regulation, market allocation, or boycotting at any of its functions.

# SWOT Analysis

STRENGTHS	WEAKNESSES
EDUCATION	Regulatory environment
STAFF	Fear of failure
COMMUNITY RELATIONSHIPS	PTSD
LEADERSHIP ACADEMY	Attendance at events
PROFESSIONAL STANDARDS	Engagement
POLITICAL ADVOCACY	Website / technology
DIVERSITY	Broker/member apathy
SIZE	Relevant education
RELATIONSHIP WITH OTHER ORGANIZATIONS	Lack of Global platform
VOLUNTEERS	Communicating the value proposition
SCHOLARSHIP PROGRAM	Low open rate
STRONG FINANCIAL FOUNDATION	No other language services
BUILDING	Reactive and not pro-active
INTERNSHIP PROGRAM	Membership not prioritized
EVENT CENTER	Not promoting the value of RAF
NETWORKING	Not investing in real estate
PREFERRED PARTNERS PROGRAM	
REGIONAL MEETINGS	
EVENT CENTER	
STRONG GRIEVANCE COMMITTEE	
METRO-LIST	
INNOVATION	



# SWOT Analysis

OPPORTUNITIES	THREATS
NEW MEDIA OUTLETS	Agents who do not want to be REALTORS®
NON-DUES REVENUE	Loss of membership/income
ENGAGEMENT OF LESS TENURED MEMBERS	New disruptors
LEVERAGING DATA	Boxed thinking (Group think)
HOSPITALITY	Lack of inventory
RENOVATION OF BUILDING	AI
TECHNOLOGY	Being stuck in old ways
PATH TO LEADERSHIP / RESOURCES/TOOLS	Unprofessional behavior (leadership and staff)
CLEAR PROCESSES AND SYSTEMS	Misinformed consumers uninformed members
OUTSIDE ORGANIZATIONS	Disengagement / member apathy
DUES BILLING ENGAGEMENT SURVEYS	No changes / status quo
NEW CLASSES OF MEMBERSHIP	Regulation – tenant laws/taxes/county and local public policy
CREATION OF COUNCILS TO INCLUDE MORE	Escrow encroachment
MENTAL HEALTH RESOURCES	Fear of change
REVAMPING OFFICE SPACE	Board of choice
ENHANCE STORE	Pandemic
PARTNERSHIP WITH MEMBERS OUTSIDE	Allowing others to tell your story
AGENT FEATURED STORIES #SARCARES	Politicians
GLOBAL BUSINESS REFERRAL PROGRAM	Insurance
	Technology
	Competition
	Economic volatility