



# The REALTOR® Association of Pioneer Valley (RAPV) Strategic Plan 2025-2027

By 2027, RAPV will be an essential hub for real estate professionals in the Pioneer Valley, recognized for its high value, relevant offerings, operational excellence and strong community engagement. We envision an organization that not only serves its members but also plays a pivotal role in shaping the region's real estate sector.

## **The Real Estate Sector at a Crossroads**

### **A Time of Disruption, A Time for Reinvention**

Since 2020, the world has experienced significant disruption, leading to numerous settlements and lawsuits that have impacted various industries, including real estate. These legal challenges have influenced brokerage decisions regarding REALTOR® requirements, prompting changes in how real estate transactions are conducted. As a result, both buyers and sellers now face new processes and considerations in the real estate market.

- What is the value of a local association in this changing landscape?
- How can RAPV best deliver impact for its members going forward?

## **RAPV's Next 3 Years**

The 2024 strategic planning process elicited ideas on the above questions from a cross-section of RAPV members and leaders. These inputs informed the StratPlan team's discussions and eventual decisions on a set of priorities and goals to enhance RAPV's relevance and revitalize its outreach strategies over the next 3 years. The team members are listed on page 7.

## Updated RAPV Vision

Be the leading voice for real estate in our region and empower our members to thrive.

## Priorities & Goals for 2025 - 2027

The following strategic goals outline a clear direction for achieving this vision over the next three years, focusing on enhancing member value, improving operational efficiency, and strengthening our community presence.

**Priority A: Empower members to succeed at every career stage, supporting them in the evolving business, legislative, and regulatory environment.**

- **Goal 1:** Develop and execute a member services strategy which gives members support, resources and timely information that suit needs at each career stage.\*
- **Goal 2:** Revamp the member experience to reflect current and future needs, trends and demographics.
- **Goal 3:** Provide brokerage leadership with the support, resources and information they need to effectively manage their agents and offices.
- **Goal 4:** Empower affiliates with tools, resources, engagement opportunities, and timely information necessary for their success.

*\*See the Appendix for the Career Stage Analysis produced by the StratPlan team*

**Priority B: Engage at the state, regional and community levels on important issues, enhancing the profession's reputation.**

- **Goal 1:** Advocate for home ownership and property rights.
- **Goal 2:** Enhance the visibility and reputation of the REALTOR® brand in the Pioneer Valley.
- **Goal 3:** Connect members to the full spectrum of REALTOR® resources at national and state levels, creating a seamless experience.

**Priority C: Strengthen RAPV's ability to adapt, execute and deliver value.**

- **Goal 1:** Ensure RAPV's financial sustainability.
- **Goal 2:** Develop a robust leadership pipeline to ensure RAPV's long-term stability.
- **Goal 3:** Enhance the rigor with which we work.

*As you review this plan, please keep the following in mind:*

- This plan shares priorities which will drive the day to day work.
- It does not summarize the tactical "How" aspects of that day to day work.

## If RAPV Succeeds, How Will We Know?

Measures and targets drive the momentum of any strategic plan. Whether measures are quantitative or qualitative, whether they measure outcomes like member retention or activities like advocacy actions, a clear set of measures enables the association to recognize when it's making progress and adapt when it isn't.

In this section, multiple measurement options are listed under each goal.

- *It's important not to get lost in measurement*, with more effort spent on evaluating things than on actual implementation and programmatic work.
- Depending on the level of effort associated with each measure, *perhaps choose one key measure* per goal for 2025, then address additional measures in later years.
- The measures below were brainstormed by the StratPlan team. Committees and other stakeholders may have additional ideas.

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*Priority A: Empower members to succeed at every career stage, supporting them in the evolving business, legislative, and regulatory environment.*

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The RAPV Advantage will be characterized by clear and tangible benefits that foster enthusiasm and loyalty among our members. Members and stakeholders will view RAPV as the go-to resource for all real estate matters. RAPV will be viewed as a valuable partner by brokers, managers, designated REALTOR®s and affiliates. Membership numbers will be up, with possibly new categories of members. Our events will be known for their real-world value as well as consistently profitable and sold-out. Top-tier speakers and educators will increasingly seek to participate in our initiatives. Revenue from both dues and non-dues sources will grow as RAPV facilitates relationships and connections among its members and across the region.

### **Goal 1: Develop and execute a member services strategy which gives members support, resources and timely information that suit needs at each career stage.**

If RAPV succeeds at this goal, how will we know?

- **Level of overall member satisfaction/perceived value\***
  - Obtain baseline data in 2025; measurement approach TBD
- **Level of member satisfaction/perceived value\*** regarding marquee offerings/events
  - Measurement approach TBD

*\* Note: RAPV must be able to sort data by key member segments based on career stage – early, mid and veteran, and by affiliate vs REALTOR® member.*

- **Attendance at events**
  - Obtain baseline data from 2024 data; set targets for 2025
- **Other possible measures**
  - Usage/utilization of select tools/resources?
  - Engagement in affinity groups?

*Increases in membership numbers and revenue will be measured under Priority C.*

## **Goal 2: Revamp the member experience to reflect current and future needs, trends and demographics.**

If RAPV succeeds at this goal, how will we know?

- **New website launched according to timeline** established in the project plan, with clear plans to track engagement and traffic.
  - If possible, gather baseline engagement and traffic data from current website
- **Refreshed communication strategy launched according to timeline** established in the project plan, incorporating digital and in-person channels.
- **Levels of engagement and traffic with various channels** as compared to overall benchmarks and compared to 2024 baseline data.
- **Level of participation** in new options for member volunteer involvement (e.g. Done in a Day, Taskforces, etc.).

## **Goal 3: Provide brokerage leadership with the support, resources and information they need to effectively manage their agents and offices.**

If RAPV succeeds at this goal, how will we know?

- **Level of satisfaction/perceived value**
  - Obtain baseline data in 2025; measurement approach TBD
- **Level of attendance at target events**
  - Obtain baseline data from 2024; set targets for 2025

## **Goal 4: Empower affiliates with tools, resources, engagement opportunities, and timely information necessary for their success.**

If RAPV succeeds at this goal, how will we know?

- **Level of overall satisfaction/perceived value**
  - Obtain baseline data in 2025; measurement approach TBD
- **Level of affiliate attendance at target events**
  - Obtain baseline data from 2024; set targets for 2025
- **Increase in sponsors**
  - Obtain baseline data from 2024; set target for 2025

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*Priority B: Engage at the state, regional and community levels on important issues, enhancing the profession's reputation.*

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RAPV aims to strengthen its position in the region by advocating for policy and legislation that supports member interests, as well as by elevating the REALTOR® brand. Developing deliberate partnerships will be essential. We will serve as a vital information resource for the entire community, cultivating strong relationships with media outlets that consider us their first call for comments and insights.

### **Goal 1: Advocate for home ownership & property rights.**

If RAPV succeeds at this goal, how will we know?

- **# of ongoing relationships/partnerships with target individuals and entities** (e.g. community organizations, governmental bodies, and other stakeholders)
  - Obtain baseline data from 2024; set targets for 2025
- **# and dollar amount of fair share contributions and major investors in RPAC**
  - Obtain baseline data from 2024; set target for 2025
- **# of advocacy contributions and successes**
  - Criteria to be defined in terms of what qualifies as a contribution or success.
    - For example, activities like meetings with key players, submission of formal documents, contributions to legal briefs, etc.
  - This measure would track both proactive engagement and influence efforts as well as reactive responses to unforeseen events.
- **Member participation in advocacy-related activities** (e.g. RAPV events, community town halls, etc.)
  - Obtain baseline data in 2025

### **Goal 2: Enhance the visibility and reputation of the REALTOR® brand in the Pioneer Valley.**

If RAPV succeeds at this goal, how will we know?

- **# of NAR marketing materials/ad campaigns leveraged** to promote the REALTOR® brand within the Pioneer Valley.
- **# of members involved** in municipal, regional, or state committees/boards/taskforces, etc.
  - Obtain baseline data in 2025

### Goal 3: Connect members to the full spectrum of REALTOR® resources at national and state levels, creating a seamless experience.

If RAPV succeeds at this goal, how will we know?

- **Attendance at target MAR/NAR events**
  - Obtain baseline from 2024; set targets for 2025
- **# of MAR/NAR resources highlighted to members on an annual basis** (e.g. member benefits, grant programs, NAR economist updates, legal hotline, etc.)
  - In addition to tracking the resources that are shared, gauge the reach of these specific communications, by tracking email open rate and click through rates

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*Priority C: Strengthen RAPV's ability to adapt, execute and deliver value.*

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Achieving operational excellence will involve intentional, data-backed decision-making that guides our approaches to achieving our goals. A robust leadership pipeline will be established, supported by an open-minded Board focused on problem-solving and serving the membership at large. We will revitalize our committee structures and volunteer opportunities.

To sharpen our communication, we will implement a user-friendly, member-centric website redesign alongside a thriving social media presence and effective email strategy. Members will enjoy easy access to information generated by RAPV, MAR and NAR, enhancing their overall experience.

The office on Industry Avenue will be leased to tenants. We will find a new space that offers convenient access for members and creates a welcoming atmosphere ideal for informal meetups. We envision expanded member services that may include coworking spaces, a business center, and a "green room" designed for digital content creation.

### Goal 1: Ensure RAPV's financial sustainability.

If RAPV succeeds at this goal, how will we know?

- **# of new members**
  - Obtain baseline data from 2024; set target for 2025
- **Member retention rate**
  - Obtain baseline data from 2024; set target for 2025
- **Increased revenue via non-dues sources**
  - Obtain baseline data from 2024; set target for 2025
- **Revenue from office leases** (commencing on a date TBD)

## Goal 2: Develop a robust leadership pipeline to ensure RAPV's long-term stability.

If RAPV succeeds at this goal, how will we know?

- **# of members involved in committees and other volunteer options**
  - Obtain baseline data from 2024; set target for 2025
- **# of board successors identified and prepared**
  - Set target for 2025

## Goal 3: Enhance the rigor with which we work.

If RAPV succeeds at this goal, how will we know?

- **Use of data-driven decision-making** regarding investment of time, effort and money in various RAPV offerings.
- **Progress reports on each goal in the strategic plan delivered** to Board on a regular basis, using standard template.
- **Selected internal and external processes are standardized** (e.g. committee updates are in a standard template; event formats have standards and consistency).

## Implementation & Next Steps

Once the Strategic Plan is approved, the RAPV CEO will work with leadership and staff to assign timelines, responsibilities, and resources. The Board will review that project plan on a regular basis to ensure that tasks are being completed as scheduled and to allocate resources as needed.

*The goals in this plan are not short-term activities; they will require significant effort to initiate and continuous resources and attention to sustain. Focus on a select few priorities per year and execute them thoroughly, rather than attempting to tackle everything at once.*

## Conclusion

In recognizing the disruptions and uncertainty within the real estate sector – within the Pioneer Valley and across the nation, RAPV is committed to tackling the challenges and seizing the opportunities presented during this pivotal moment. By implementing the strategic priorities and goals described in this plan, we aim to solidify RAPV as an indispensable resource for real estate professionals. The association extends its heartfelt gratitude to the StratPlan team for their willingness to invest their time, effort and expertise into developing this ambitious plan.

- Sue Drumm
- Tim Grader
- Steve Laplante
- Judy Nevarez
- Peter Ruffini
- Laura Stevens
- Erica Swallow
- Don Thompson
- David Belew

## APPENDIX – Member Career Phases

### Member Segment Analysis

RAPV's membership have varied needs and interests – for instance, differences based on career stage, based on member type (affiliate vs REALTOR®) and based on location/county. Some members are just starting to build a database; some have reached the decision to become a broker; some are passionate about advocacy and some are navigating challenges to work/life harmony.

- Various characteristics and needs of RAPV members at various career stages are listed below. This analysis can provide a foundation for decisions about what to offer these member segments.
- *RAPV must determine criteria for each segment* – for example, perhaps mid-career members have been in the business X# of years or have X# of transactions annually.
- For any of these segments, some members are full-time and others part-time.

### Early Career

In this category, being a REALTOR® could be a member's first profession; for others, it is a career change.

Some typical characteristics and needs of this segment are:

- Building a client base, figuring out what approaches to prospecting, marketing and business development will work for them amidst a crowded market where it's hard to stand out.
- Perhaps, choosing a specific niche or locale on which to focus.
- Establishing a professional network of other REALTOR®s, mortgage brokers, property inspectors, contractors, etc.
- Learning the standards, fundamentals and etiquette of the profession – what will set you up for success and keep you out of trouble.
- Growing their understanding of the market, the MLS tool, pricing strategies, and legal requirements.
- Learning the interpersonal skills needed to engage with varied types of clients.
- Developing systems to keep them organized and efficient, identifying technology tools as needed.
- Budgeting and managing expenses, given a lower split and unpredictable initial income.
- Not necessarily thinking about involvement with professional associations unless encouraged by a manager, broker or mentor.

- Depending on the generation, may be quite tech savvy and comfortable with “new” channels of communication like social media, podcasts, etc.

### **Mid-Career; Established**

Some typical characteristics and needs of this segment are:

- Developing the organizational and time management skills required to manage a stable business that involves prospecting, marketing, property showings, negotiations, and paperwork among other things.
- Building repeat business.
- Expanding and maintaining professional networks to create more business opportunities.
- Considering forming a team and/or becoming a broker.
- Contemplating more strategic engagement with their industry, in the form of advocacy, participation in municipal or community committees, volunteer work, involvement with professional associations, etc.
- Building people and team management skills if forming a team.
- Navigating economic cycles and changing market conditions successfully.
- Staying relevant in a competitive market with changing rules and regulations.
- Creating an overall financial plan for all aspects of their life.
- Managing a busy schedule while maintaining personal and family well-being.

### **Veteran**

Common focus areas are:

- Staying up to date and relevant.
- Expanding their “footprint” and reach.
- Seeking out fewer transactions, winding down the pace.
- Formulating an exit plan and/or considering other types of roles in the industry.
- Ensuring a smooth transition for their clients and possibly mentoring a successor.
- Evaluating their financial readiness for retirement and any ongoing income streams.
- Sharing their wealth of experience with newer agents to help them succeed.
- Considering how to stay engaged and fulfilled in retirement, possibly through part-time work, consulting, or volunteering.