



2024 – 2026 Strategic Plan

Mission: Founded in 1984 by the MIBOR REALTOR® Association, the REALTOR® Foundation seeks *“To support local nonprofits solving homelessness in central Indiana.”*

Vision: *Everyone in our community has a safe place to call home.*

Values: Persistence, Equity, Service, Collaboration, Inclusion

At the REALTOR® Foundation, we embody **persistence** by relentlessly pursuing solutions to end homelessness, never wavering in our commitment to creating lasting change in central Indiana. We are persistent in our fundraising efforts; not backing down from a challenge.

Equity is at the heart of our mission, as we strive to ensure fair and just access to housing for all individuals, regardless of background or circumstance. Our commitment to equity is shown in the diversity of our grants and the populations served.

Service is our cornerstone, driving us to actively engage with and support local nonprofits dedicated to addressing homelessness, and fostering a culture of compassion and giving within our real estate industry.

Collaboration is key to our success, as we work hand-in-hand with members, sponsors, donors, and stakeholders to leverage resources and expertise, maximizing our collective impact.

Inclusion is fundamental to our approach, as we embrace diversity and ensure that all voices are heard and valued in our efforts to create a more equitable and inclusive community for everyone.

The Landscape:

There is a need to:

- Support central Indiana’s efforts to make homelessness rare, short-lived, and recoverable.
- Build pride among members of the Foundation's work.
- Continue to grow donor base and member participation.
- Continue to build sustainable operating support.

- Prepare for the next level of growth and impact for the Foundation.

Assumptions:

1. The economic conditions in central Indiana will affect members' ability to donate to the Foundation.
2. The number of members within MIBOR will be maintained at current levels and the make-up of donors will change as the MIBOR membership changes.
3. The REALTOR® Foundation will respond to the greatest housing needs in the homeless community.

Goal 1: Maximize the impact of the Foundation's grant recipients in the community.

Strategies:

- Increase our annual grant contribution to \$400,000 by the end of 2024 and maintain grantmaking between \$300,000 and \$350,000 through 2026 as the organization resizes for the next phase of growth.
 - Using a combination of increased fundraising efforts targeting top producing members, reengaging lapsed donors, and boosting donor retention and a portion of the annual endowment fund draw to expand grantmaking for 1 year to \$400,000 for the 40th Anniversary.
 - Position the \$100,000 increase in grant funds for the 40th Anniversary for 1-2 mega grants targeted at key housing expansions in the community.
- Invest in organizations making a measurable impact on central Indiana's homeless.
 - Identify and seek out high-performing organizations to submit LOI
 - Prioritize grants that increase housing capacity.
 - Connect early in the year with grantees on their growth plans to identify early contenders for mega grants.
 - Identify organizations in the community expanding or adding to the unit/bed count specifically for those on the housing waitlist or most at risk for homelessness.
- Take a leadership role in Indianapolis' efforts to reduce homelessness.
 - Engage with CHIP and the COC on opportunities to plug into community planning efforts.
- Continue and build upon annual professional development training for grantee volunteers and staff so that they may increase their capacity to serve and fundraise.
 - Promote and talk about Sullivan Fund opportunities in advance of the grant proposal so the community is clear on what they are requesting, and organizations understand how best to utilize the resource.
 - Host annual grantee summit bringing valuable training to grantees free of cost.

Goal 2: Educate Members on the Foundation's Mission and Impact

Strategies:

- **Leverage the 40th Anniversary to tell the Foundation's story and impact on our recurring grantees**
 - Utilize the 40th Video produced for the Ball in emails, social media, modified in short video form for reels, and in-person presentation
 - Produce similar videos featuring long-term grantees who can speak to the support they have received from the Foundation beyond grant funds like Pathway to Recovery.
- **Develop a comprehensive communications plan** highlighting grantees and their work in more detail leveraging the Foundation's blog, video, social, website, newsletter, and monthly talking points.
 - Remain mission-focused, shifting event promotions to secondary messaging priorities
 - Leverage Homeless and Hunger Awareness Week to deliver mission-focused information to all members before the year-end campaign.
- **Engage our biggest advocates** with personalized communication and connection points
 - Continue in-depth training on the Foundation within the REAL curriculum. Engage all REAL alumni throughout the year.
 - Create meaningful connections for Division Leadership and Foundation grantees in their community.
 - Continue to reestablish Team Foundation/Ambassador program
- **Meet the members where they are** at with coordinated mission moments
 - Ensure every Division meeting has a Foundation member prepared to share a mission moment.
 - Develop 20 Minute Presentation to be used at Division Meetings – Train board members on delivery
 - Increase visits to office sales meetings
 - Partner with title companies to display Foundation information in lobbies and conference rooms.
- **Grow REALTOR® Week of Service** in participation and number of projects.
 - Work with Grantees to identify meaningful volunteer projects in each division community. Establish consistency in communication and volunteer experience. Utilize WOS projects to capture b-roll and photos of grantees for year-end fundraising.

Goal 3: Expand the Foundation's philanthropic impact through increased donations.

Strategies:

- **Sustain the Foundation's donor base.**
 - Develop a donor stewardship plan that includes acknowledgment, education, engagement, and follow-up.
 - Craft a new donor email journey for those that give as a result of a peer-to-peer campaign or "A-thon"
 - Create a modified "Foundation Focus" newsletter sent through Bloomerang to keep all donors engaged regardless of MIBOR membership status.
 - Create a focused campaign to reengage lapsed donors. *(759 Lapsed since 2021, 116 contributed over \$250)*
 - Increase the donor retention rate to at least 50% *(renew about 500 donors who gave in 2023)*

- **Grow the Foundation's donor base to represent 20% of MIBOR membership.**
 - Develop a targeted campaign to engage the top 2,000 producing REALTOR® members.
 - Increase transactional giving participation and dollars contributed in current offices.
 - Add 3-5 new brokerages offering transactional giving each year of the plan.
 - Promote monthly giving option to members NOT in transactional giving offices.
 - Connect with event attendees with mission information and call to action.

- **Expand the Foundation's donor base beyond MIBOR membership.**
 - Identify and cultivate relationships with corporations and philanthropists outside of the industry, but with a natural connection to our mission or homeownership.

Goal 4: The Foundation maintains financial and organizational stability.

Strategies:

- **Continue to grow the endowment value**
 - Develop a comprehensive marketing and education plan to promote planned giving options and the endowment.
 - Identify and cultivate top prospects to establish Donor Directed Funds (\$25,000)

- **Secure and sustain operating revenue.**
 - Maintain and grow current event revenue.
 - Cultivate relationships with potential new sponsors.
 - Increase Triple Crown participation to 30 companies.
 - Work with current partners to develop unique fundraising partnerships (IREIBA, WCR, GIMBA, etc.)
 - Secure consistent commitment from MSC for a portion of BLC® fines.
 - Continue consistent draw from endowment to support operations and grant growth

- **Nurture and build a deep bench of leaders.**
 - Identify and cultivate potential committee members and donors for potential board appointments.
 - Provide training opportunities for Foundation board to maximize their effectiveness.
 - Communicate and promote volunteer opportunities with MIBOR members.