



2021 – 2023 Strategic Plan

Mission: Founded in 1984 by the MIBOR REALTOR® Association, the REALTOR® Foundation seeks *“To mobilize our real estate community to raise funds and foster support for organizations that transition central Indiana’s homeless to safe and secure housing.”*

Vision: *Central Indiana’s homeless have access to safe and permanent housing solutions that positively change their lives.*

The Landscape:

There is a need to:

- Support central Indiana’s efforts to make homelessness rare, short-lived, and recoverable.
- Further educate and build pride among members of the Foundation’s work.
- Continue to grow donor base and member participation.
- Continue to build sustainable operating support.
- Establish long term sustainability through growth of the endowment fund.
- 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 2023.**
- Invest in organizations making a measurable impact on central Indiana's homeless.
- Take a leadership role in Indianapolis' efforts to reduce homelessness.
- Provide opportunities for professional development training for grantee volunteers and staff so that they may increase their capacity to serve and fundraise.
- Establish a task force to determine the feasibility of a capital investment for additional housing in the community in the next 10 years.

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

Strategies:

- **Develop comprehensive communications plan highlighting grantees and their work in more detail leveraging the Foundation's blog, video, social, website, newsletter and monthly talking points.**
 - Develop member communications based on length of membership.
 - Onboarding new members
 - Targeted approach after 3 years of membership
 - Focused messaging on endowment and planned giving for 20+ year members
- Modify Mission and Vision statement to broaden grant focus and better describe our work.
- Establish an in-depth training on the Foundation within the REAL curriculum. Further engage REAL alumni throughout the year.
- Create meaningful connections for Division Leadership and Foundation grantees in their community.
- Develop onboarding plan for new transactional giving offices that includes mission focused launch, volunteerism, and education.
- Reestablish the Ambassador program
- Grow REALTOR® Week of Service in participation and number of projects.
 - Create a follow up strategy to continue engagement.
- Increase visits to office sales meetings for quick presentations.
- Partner with title companies to display Foundation information in lobbies and conference rooms.

Goal 3: Expand the Foundation's philanthropic impact by raising more money.

Strategies:

- **Sustain the Foundation's donor base.**
 - Develop comprehensive and consistent donor stewardship plan that includes acknowledgement, education, engagement, and follow up.
 - Maintain Foundation's donor retention rates at 60% or above.
- **Grow the Foundation's donor base to represent 12% of MIBOR membership.**
 - Increase transactional giving participation and dollars contributed in current offices.
 - Cultivate and educate onboarding staff that are the primary messengers in offices.
 - Promote "in honor" giving strategies to further engage donors and communicate how transactional giving can help enhance your business.
 - Target current lower-level donors in transactional giving offices to increase contribution.
 - Cultivate relationships with top producers in transactional giving offices.
 - Add 3-5 new brokerages offering transactional giving each year of the plan.
 - Leverage monthly donation platform and create messaging plan to promote regularly.
 - Help affiliate partners develop their own version of transactional giving.
 - Continue to create new peer-to-peer fundraising campaigns (ex. REAL Challenge)
- **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:

- **Grow the endowment value to \$2 million.**
 - Increase donations to the endowment (direct and planned)
 - Develop a comprehensive marketing and education plan to promote planned giving options and the endowment.
 - Determine strategic use of interest funds once \$2 million threshold has been met.
- **Secure and sustain operating revenue.**
 - Grow corporate giving to the Foundation.
 - Maintain and grow current event revenue.
 - Cultivate relationships with potential new sponsors.
 - Increase Triple Crown participation to 20 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.
- **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.