

Approved 1/20/22



Our Vision is our WHY:

Advancing the Profession and Improving our Communities

STRATEGIC IMPLEMENTATION DOCUMENT

I. Canopy Realtor® Association

WHY: The Association through its leadership, committees (Canopy Housing Foundation Committee, Diversity and Inclusion Alliance, Education Advisory Committee, Fair and Affordable Housing Committee, Marketing and Communications Advisory Group, Professional Standards Committee, REBIC/Government Affairs and YPN) and staff advance the profession and improve our communities.

WHAT: Creating Value, Improving Professionalism, Providing Career and Professional Development, Education, Advocacy and Developing Future Industry Leadership While Upholding the Highest Operational/Financial Standards.

HOW: Advancing the Profession and Improving our Communities by:

A. Promoting, to members and the public, the value Realtors® bring to the profession and the advantage of working with a Realtor®.

- Promote the professional and educational services available to members.
- Promote Realtors® as the best source of information for real estate services through an annual multi-media campaign.
- Highlight Realtor® involvement in discussions with government officials on issues impacting the industry and consumers.

B. Providing resources to improve professionalism and career development.

- Promote the NAR Code of Ethics, Ombudsman Program, mediation/arbitration for dispute resolution, Commitment to Excellence (C2EX) program, NAR's competition in real estate website and Risk Management best practices.
- Educate Realtors® about the professional standards process and the options available to them for handling conflict between agents and firms.
- Demonstrate to Realtors® (BICs/Agents) about how being involved in the Association will enhance their business and professionalism.
- Engage Realtors® (BICs/Agents) through transformative education and collaboration to encourage professionalism.
- Emphasize the obligation of Realtors® to cooperate, in a professional manner, and compensate each other.
- Frequently survey membership about current and future services and benefits.

C. Educating Realtors® about local, state and national issues impacting the industry and the public.

- Provide education opportunities through Realtor® Hot Topics, Broker-in-Charge Briefings and industry designation and certification courses focusing on legal

and regulatory issues impacting the industry, the Association and members, as well as the public.

- Inform members of advocacy efforts and critical legislative and public policy issues about homelessness, affordable housing, fair housing and home ownership through Realtor® Hot Topics, weekly eHeadlines, social media and other communication channels.
- Connect with the public sector and community resources to deliver valuable and timely programs on local topics as well as emerging issues.
- Partner with other local associations, state associations and NAR to leverage our resources for delivering education on local, state and national issues.

D. Empowering Realtors® to get involved in the community to advocate and protect homeowners, housing and homeownership.

- Increase involvement with political, regulatory, legislative and community partner agencies and organizations to educate decision makers on the Association's position to encourage adoption of policies and regulations that reduce or eliminate burdensome costs that create barriers to building affordable housing and utilize alternatives to encourage development of housing for all.
- Create awareness and foster action within the Realtor® community and the community-at-large around issues that greatly affect the housing community and the community-at-large relevant to the Foundation's mission (fair housing, affordable housing, and homelessness).
- Provide consistent advocacy opportunities especially during Fair Housing Month in April and Home Ownership Month in June.
- Advocate for homeownership, housing affordability and what is affordable housing through an educational campaign.
- Provide educational opportunities for Realtors® working with first-time homebuyers and other clients who are purchasing in the affordable price range (80% of the median income and below) through the Workforce Housing Certificate Program.
- Work with partner organizations to identify obstacles to homeownership for minority members of the community.
- Connect members with industry and community resources that support diversity and inclusion in homeownership.
- Deepen education and understanding about the link between local issues and RPAC.

E. Identifying and developing future Association leaders/influencers.

- Reach out to Owners/BICs to help identify future leaders for development.
- Develop leaders into influencers.
- Ensure leaders/influencers are diverse and reflective of Association membership.
- Continuous review and improvement to the Leadership Academy.

F. Maintaining a high standard for operational performance and financial stewardship.

- Consider NAR Core Standards to be minimum requirements and seek to exceed them in all areas.
- Adhere to a model of continuous improvement in all operational areas.
- Continuously monitor cash flow and seek ways to improve financial performance.
- Regularly monitor, review and update investment strategy and reserve policies.
- Continue to identify opportunities for non-dues revenue.
- Continue to identify and implement cost-saving measures.

II. Canopy Housing Foundation

WHY: Through the work of the Foundation, Realtor® volunteers, leadership and staff actively demonstrate their concern about the entire housing continuum - from homelessness to homeownership. Through its many programs and services, Realtors® are able to support unmet housing needs in three North Carolina counties (Mecklenburg, Iredell and Haywood) and the Charlotte region to advance the profession and improve our communities.

WHAT: Recognized charitable arm of the Association, dedicated to Advocacy, Education, Funding and Leadership.

HOW: Advancing the Profession and Improving our Communities by:

- A. Ensuring a solid financial future for the foundation, both through operating and endowed funds and that the foundation's key programs remain relevant and sustainable.**
 - Adhere to a model of continuous improvement in all operational and programming areas.
 - Continuously monitor cash flow and seek ways to improve financial performance.
 - Continue to explore and implement strategic measures to diversity and grow revenue streams.
 - Be mindful of the responsibility accepted by the Foundation when investing donor and partner funding; ensure measures are in place to utilize the funding wisely and effectively.
- B. Establishing the foundation and our Realtor® members as recognized leaders in housing on the local, state and national level.**
 - Position Realtors® as influencers actively creating a community where all housing needs are met.
 - Create an environment where Realtor's® philanthropic efforts are recognized by the community; ensure that these philanthropic efforts lend value and create lasting impact in the communities in which they are placed.

- Continuously educate and equip Realtors® on principals and positions to raise awareness among consumers that Realtors® are protecting homeowners, housing and home ownership.
- Provide on-going opportunities for members to commit time, energy, and funding to address Charlotte’s unmet housing needs.
- Foster action within the Realtor® community and the community-at-large around issues that greatly affect the communities we serve; ensure those issues remain relevant to the foundation’s mission (in particular, fair housing, affordable housing and homelessness).

III. Canopy Real Estate Institute

WHY: Canopy Real Estate Institute’s array of education offerings provides members and students with licensing education, specialized training, career development and designations to advance the profession and improve our communities.

WHAT: Education/Career Professional Development.

HOW: Advancing the Profession and Improving our Communities by:

A. Promoting Canopy Real Estate Institute (CREI) as a well-established, top-ranked education provider serving the Carolinas and beyond with a 50-year track record.

- Full service education provider offering prelicensing, postlicensing, continuing education and professional development.
- Quality instruction from award-winning instructors with in-the-field experience prepares students to be Realtors® with the knowledge and skills needed to serve clients.
- Flexible class options for different lifestyles: in-person, live-online, on-demand. Day, evening and weekend schedules.
- Competitively priced tuition for affordability, offering early-bird specials and member pricing.
- Value-added support services and personalized attention including free study halls, tutoring and bonus materials.

B. Coordinating with other institutions (Johnson C. Smith University, UNC Charlotte and CMS) to advance the profession of real estate and improve opportunities for diversity and inclusion.

- Continue to cultivate relationships with UNC Charlotte (now Charlotte) utilizing Canopy Real Estate Institute for prelicensing, postlicensing and continuing education.
- Continue working with CMS on developing curriculum for real estate as a

career path.

- In partnership with the Charlotte Region Commercial Board of REALTORS®, continue to sponsor programs at Johnson C. Smith University with a focus on commercial real estate.

C. Implementing strategic marketing and advertising campaigns to make CREI the top choice for real estate education and professional development.

- Utilize print, digital and social media to reach members and new students
- Develop key messaging to focus on the benefits of choosing CREI
- Position CREI as affordable in obtaining an education in addition to industry resources and access to connections.

D. Maintaining a high standard for operational performance and financial stewardship.

- Continuously monitor cash flow and seek ways to improve financial performance.
- Continue to identify and implement cost-savings measures.

IV. Canopy MLS

WHY: Canopy MLS and its leadership, the Canopy MLS Advisory Group, and staff ensure that subscribers are receiving the technology tools, training and support to better equip Realtors® to serve clients with their real estate needs to advance the profession and improve our communities.

WHAT: MLS Technology, Training and Support

HOW: Advancing the Profession and Improving our Communities by:

A. Researching and identifying products/services for members that complement the products/ services of their firms as well as offer products/services a la carte to all subscribers equally where possible.

- Continue evaluating products at advisory group and board level.
- Offer and promote technologies and tools that members/subscribers identify to enhance doing business successfully, efficiently, and securely.

B. Providing and protecting the most trustworthy, timely, accurate and complete property data possible.

- Closely monitor third party distribution to better protect our data.
- Use Listing Data Checker to proactively monitor the Canopy MLS database for inaccurate data and compliance with the Canopy MLS Rules and Regulations, and accept complaints from Canopy/MLS Subscribers.

C. Monitoring and/or participating in industry initiatives and organizations (e.g.

Council of Multiple Listing Services, RESO, MLS GRID, MLS Roundtable).

- Educate members on trends and changes in the industry, and the value the industry initiatives bring to the members' personal business.
- Use the information to develop/enhance our strategy and initiatives.
- Dedicate more resources to strategic initiatives.

D. Continually reviewing and updating Canopy MLS policies and rules to ensure they are relevant with current industry standards in addition to being visionaries in data integrity.

- Adapt education and communications to members through multiple channels to ensure implementation and effective feedback.

E. Positioning Canopy MLS for expansion/regionalization.

- Promote the value and advantages to Participants/Subscribers (e.g. cost efficiencies, access to MLS, latest services, technology and training) as a benefit of becoming part of Canopy.
- Promote the value and advantages to local Realtor® Associations (e.g. market statistics, infographics, In the Know MLS Campaign/Realtorsknewmore.com and personalized dashboards for their Association members) as a benefit of becoming part of Canopy.

F. Operating the Find a Home on CarolinaHome.com as a portal that adheres to the Fair Display Guidelines, and drive traffic to the Owners/BICs and agents.

- Assess viability of CarolinaHome.com.
- Research alternatives to CarolinaHome.com

G. Maintaining a high standard for operational performance and financial stewardship.

- Consider NAR MLS Best Practices to be minimum requirements and seek to exceed them in all areas.
- Continuously monitor cash flow and seek ways to improve financial performance.
- Regularly monitor, review and update investment strategy and reserve policies.
- Continue to identify and implement cost-saving measures.