



**DRAFT 4/24/15**

## **The 2016 Strategic Plan**

**Introduction:**

The strategic objectives in the Arizona Association of REALTORS® (AAR) Strategic Plan are the parameters within which the primary committees will develop strategies to deliver programs, products, services and activities (PPSAs). Specific PPSA planning must be tested against the association vision, purpose and customer.

**The AAR Vision is:**

REALTOR® . . . the best prepared real estate practitioner with the highest standards.

**The AAR Purpose is:**

To serve its members by providing and promoting services to enhance members' abilities to conduct their businesses with integrity and competency and to promote the extension and preservation of private property rights.

**The AAR Customer is:**

The association has diverse customers who are the direct recipients of the association's PPSAs: members in good standing and local member associations.

**Strategic Plan Development:**

This plan is the result of an intensive Planning Session held on April 23-24, 2015 in Sedona, Arizona. The participants included AAR officers, directors, committee chairs/vice chairs, local association leaders and key AAR personnel. The 2015 Strategic Plan created a solid foundation for the 2016 Strategic Plan so that the participants concentrated on action items for 2016.

NAR Consultant, Jerry Matthews, facilitated the planning process. He worked with the group to determine which areas of the current Strategic Plan required additional focus. As a result, the following Strategic Plan for 2016 was developed.

## **THE STRATEGIC PLAN**

### **GOALS**

- Goal 1:** Agents are competent and professional
- Goal 2:** Brokers are fully informed and engaged leaders
- Goal 3:** Consumers value REALTORS®
- Goal 4:** Government is responsive to REALTORS® as leaders in the real estate industry
- Goal 5:** Members exemplify professionalism
- Goal 6:** AAR is a supportive and valued partner
- Goal 7:** AAR will comply and assist local associations in complying with NAR Core Standards

## **AREA 1: GOVERNANCE AND OPERATIONS**

**Purpose:** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.

**Strategic Objective 1.A:** AAR is an effective member directed, fiscally responsible, non-profit corporation.

**Strategic Objective 1.B:** AAR offers a value package that enhances members' abilities to conduct their businesses with integrity and competency.

**Strategic Objective 1.C:** AAR partners with and collaborates with local member associations to accomplish mutual goals.

**Strategic Objective 1.C.1:** AAR leadership engages with local association leadership to strengthen the strategic partnership.

**Strategic Objective 1.D:** AAR is regarded as an influential voice and partner to the NATIONAL ASSOCIATION OF REALTORS®.

**Strategic Objective 1.E:** AAR cultivates strategic alliances and partners with MLSs, institutes, societies, councils, and other homeownership entities on endeavors that benefit the membership.

### **Actions:**

1. Influence members to utilize REALTOR® brands (products and services)
2. Promote REALTORS® as professionals
3. Partner with local associations to provide new REALTOR® orientation resources to include AAR
4. Create a system to monitor success of orientation programs with new members
5. Promote the value and the “why” of the REALTOR® brand to our members
6. Be a resource and provide tools for local associations to communicate their relevance to members
7. Encourage communication and collaboration with associations and MLSs regarding the member experience
8. Continue to proactively research and review options for AAR efficiency improvement
9. Utilize various mediums for communication with the REALTOR® member and public on issues of importance within the community and provide a toolkit for the local associations and Regional Vice Presidents for implementation of REALTOR® Party resources
10. Encourage local associations to collaborate with local community leaders, organizations, the public and REALTOR® members on involvement and reinvestment in the community, with a focus on available grants and programs offered through the REALTOR® Party resources
11. Maintain a collaborative working relationship with ADRE

## AREA 2: COMMUNICATIONS AND CONSUMER OUTREACH

**Purpose:** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.

**Strategic Objective 2.A:** AAR disseminates pertinent, relevant and timely industry information.

**Strategic Objective 2.B:** AAR creates and maintains a consistent, coordinated system of communication management for all areas of the association.

**Strategic Objective 2.B.1:** AAR engages in regular outreach to members.

**Strategic Objective 2.C:** AAR investigates and implements communication methods to increase the effectiveness of AAR's efforts to reach out to members.

**Strategic Objective 2.C.1:** AAR encourages cross-linking and shared login (SSO) with local association websites.

**Strategic Objective 2.C.2:** AAR reviews, on an ongoing basis, best practices in website navigation, search and user interface and integrates these practices into AAR blogs and websites, including researching the feasibility of customizing website content for individual users based on user-selected topics and actual use of the site.

**Strategic Objective 2.C.3:** AAR evaluates the need for a mobile app to provide customized, on-demand content.

**Strategic Objective 2.C.4:** AAR investigates the feasibility of a system that allows members to choose preferred communication methods, topics and frequency of push communications.

**Strategic Objective 2.C.5:** AAR investigates ways to encourage peer-to-peer interaction and information-sharing.

**Strategic Objective 2.D:** AAR will engage in not less than four consumer outreach activities.

**Strategic Objective 2.D.1:** AAR will be the "Voice for Real Estate" in Arizona.

**Strategic Objective 2.D.2:** AAR will promote community involvement activities.

**Strategic Objective 2.D.3:** AAR will engage in advocacy efforts.

**Strategic Objective 2.D.4:** AAR will invest in the community.

### **Actions:**

1. Organize information for easy search and access by members
2. Create and promote a webpage that includes safety education, incident recordation and contemporaneous incident notification via a REALTOR® "blue alert"
3. Promote the value of using REALTORS® in every transaction
4. Communicate with our members via their preferred communications method

5. Communicate the value and successes of the REALTOR® association throughout the state
6. Provide a consistent voice at AAR which will speak to trends, market statistics, and advocacy efforts with a focus on consumer outreach and education to the public
7. Solicit community outreach efforts conducted by REALTOR® members and recognize them through an annual award

### **AREA 3: LEGISLATIVE & POLITICAL AFFAIRS OVERSIGHT - ADVOCACY**

**Purpose:** AAR is the most powerful and influential political force in Arizona.

**Strategic Objective 3.A:** AAR proactively advocates and protects private property rights and real property ownership.

**Strategic Objective 3.B:** AAR advocates and capitalizes on the REALTOR® Party.

**Strategic Objective 3.B.1:** AAR maintains the most knowledgeable advocates.

**Strategic Objective 3.B.2:** AAR leverages influential relationships.

**Strategic Objective 3.B.3:** AAR cultivates strong grass roots in each local association for statewide impact.

**Strategic Objective 3.C:** AAR strives to achieve NAR RPAC fundraising goals and Calls for Action participation rates.

**Actions:**

1. Provide tools to members to help them understand the value of RAPAC
2. Encourage and educate members to share the value of RAPAC
3. Emphasize the importance of AAR's legislative/political successes to members
4. Continue to follow the Legislative Policy Statements
5. Proactively advance legislation that benefits REALTORS® and private property rights
6. Implement a mechanism by which members can relay, on a year round basis, legislative comments and proposals
7. Continue to provide assistance, examples, fundraising ideas and messaging to achieve 100% of RAPAC goal
8. Yodel our RAPAC achievements to current and new members, with a focus on the wins and money saved by RAPAC for homeowners and the REALTOR® business
9. Utilize the broker involvement program/stipend to identify and train a local broker for grassroots education efforts on participation in NAR calls for action
10. Provide training and support for the local associations on how to identify and engage REALTOR® Party champions
11. Build tools and provide consistent messages, which enable members to explain how REALTORS® directly provide value to and protect private property rights

## **AREA 4: RISK MANAGEMENT**

**Purpose:** AAR provides members with unsurpassed risk management tools.

**Strategic Objective 4.A:** AAR's forms establish the standard of care in the industry.

**Strategic Objective 4.A.1:** AAR maintains the most up-to-date forms and develops new forms as circumstances warrant.

**Strategic Objective 4.B:** AAR maintains claims statistics to identify liability trends.

**Strategic Objective 4.C:** AAR maintains comprehensive and accessible legal information for member use.

**Strategic Objective 4.D:** AAR provides programs for early and effective dispute resolution.

**Strategic Objective 4.F:** AAR is proactive in promoting laws (legislative and case law), regulations, and standards of practice that reduce member liability.

**Strategic Objective 4.G:** AAR proactively provides timely and relevant risk management information, education and tools.

**Strategic Objective 4.H:** AAR maintains an effective Legal Hotline and publishes meaningful legal information for the benefit of its members.

**Strategic Objective 4.I:** AAR provides unsurpassed Professional Standards enforcement and ongoing Professional Standards training programs for hearing panel members, grievance committee members, mediators and ombudsmen.

**Actions:**

1. Develop an educational tool kit for teams on best practices and guidelines
2. Develop a customizable broker tool kit for management of teams
3. Promote and continue to develop resources that assist brokers in operating a brokerage that is of value to the public, agents and the real estate industry (i.e. risk management, legal hotline, etc.)
4. Monitor medical marijuana legal conflicts and keep members informed as the issue evolves
5. Increase promotion and education of the RESPA-TILA changes; respond to changes and monitor
6. Share with agents the dangers posed by social media
7. Educate agents on potential ethical and legal liabilities associated with off-market listings and private listing clubs
8. Reinforce, on a continuing basis, AAR Professional Standards benefits and results
9. Protect our forms copyright

## **AREA 5: PROFESSIONAL & BUSINESS DEVELOPMENT**

**Purpose:** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

**Strategic Objective 5.A:** AAR sets the standard in quality and meaningful education that positions the REALTOR® member to succeed.

**Strategic Objective 5.A.1:** AAR develops, delivers, and/or partners to provide high-level skill-based educational programs led by instructors who are practitioners in the topics they teach and that have exceptional instructional delivery skills.

**Strategic Objective 5.A.2:** AAR works through appropriate committees to influence ADRE to permit c/e credit for business-skill related topics.

**Strategic Objective 5.A.3:** AAR provides growth opportunities to develop instructors with exceptional skills.

**Strategic Objective 5.B:** AAR provides comprehensive, reliable, and accessible information to the REALTOR® members.

**Strategic Objective 5.C:** AAR develops new volunteer leaders.

**Strategic Objective 5.C.1:** AAR delivers a leadership training program for on-going development of future local and state association leaders.

**Strategic Objective 5.D:** AAR develops online educational classes that utilize technology that raises the bar in the effectiveness of online education in both content and delivery.

**Strategic Objective 5.E:** AAR delivers or provides partnership opportunities with local associations, the brokerage communities and allied industries to deliver high-level, skill-based programs and resources.

### **Actions:**

1. Design education programs focused on member competencies
2. Build a culture that emphasizes the benefits and value of lifelong learning
3. Change member perception of educational programs for improving business success
4. Partner with brokers and local associations to deliver an agent business toolbox
5. Provide instruction to brokers on how to efficiently and effectively run an office meeting that is of benefit to the agents, and in turn, reduces the broker's workload and liability
6. Create self-evaluation tools for brokers
7. Transform select classes into workshops
8. Provide low cost or no cost subsidized educational programs as needed
9. Implement the Arizona Leadership Exchange (ALEX)



## AREA 6: BUSINESS SERVICES & TECHNOLOGY

**Purpose:** AAR supports the success of REALTOR® members with business services.

**Strategic Objective 6.A:** AAR controls the delivery of AAR's forms and provides the delivery of AAR's forms to the members as a member benefit.

**Strategic Objective 6.B:** AAR provides technology tools other than forms delivery as a member benefit only if: AAR is in a unique position to provide the tool; the tool creates value statewide; or the tool advances the real estate industry and the AAR Vision.

**Strategic Objective 6.C:** AAR investigates and provides information on products and services that increase efficiency and profitability of member business operations.

**Strategic Objective 6.D:** AAR negotiates discounts for products and services that benefit members.

**Strategic Objective 6.E:** AAR develops and maintains data, beginning with an enhanced member profile, to better understand member needs, communicate more effectively with members and maximize adoption of AAR programs and services.

**Actions:**

1. Research and inform members on how to choose the right technologies for business success
2. Pursue partnership and collaboration opportunities to teach members how to use technology for business success
3. Create and promote a webpage that includes education on real estate related scams, incident recordation and contemporaneous incident notification via a REALTOR® alert system

*Note: Goals and Actions are not in priority order.*

**Arizona Association of REALTORS®**

**Strategic Plan Certification**

This Strategic Plan includes Advocacy and Consumer Outreach components, and has been officially adopted by the Board of Directors of the Association. It will be reviewed annually by the Board of Directors and submitted to NAR for approval.

Board of Directors approval:

Date: \_\_\_\_\_

\_\_\_\_\_  
President's signature

Date: \_\_\_\_\_

\_\_\_\_\_  
President-Elect's signature

Date: \_\_\_\_\_

\_\_\_\_\_  
CEO's signature

Date: \_\_\_\_\_

<b>AAR OPERATIONS AND STRATEGIC INITIATIVES</b> <b>2016 Business Plan</b>
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**FROM:** Operations & Strategic Initiatives  
**Chair:** D. Patrick Lewis, Treasurer  
**Staff Liaison:** K. Michelle Lind, Esq., CEO  
**DATE:** 2016

**REALTOR®... the best prepared real estate professional with the highest standards.**

The following are programs, products, services and activities (PPSA's) with Operations & Strategic Initiatives oversight.

**MEMBER VALUE**

AAR will offer a value package that enhances members' ability to conduct their businesses with integrity and competency. AAR will cultivate strategic alliances and partner with MLSs, institutes, societies, councils, and other homeownership entities on endeavors that benefit the membership.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Present a plan for a program for major third party vendors who offer exceptional benefits to members for ExCom review.	
Survey members regarding how Arizona REALTORS® programs are meeting their needs and present results and recommendations.	
Influence members to utilize REALTOR® brands (products and services)	
Promote the value and the “why” of the REALTOR® brand to our members	
Conduct member research as needed to provide information to decision makers.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

## COMMUNICATIONS

AAR creates and maintains a consistent, coordinated system of communication management for all areas of the association. Efforts in this area include investigating and implementing communication methods to increase the effectiveness of AAR’s efforts to inform, engage and reach out to the membership.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3. AAR is the most powerful and influential political force in Arizona.
- 4. AAR provides members unsurpassed risk management tools.
- 5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6. AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Disseminate pertinent, relevant and timely industry and association information, (i.e., social networks, e-publishing, website, video, newsletters, magazine, etc).	
Create and maintain a consistent, coordinated system of communication management for all areas of the association.	
In conjunction with Business Services and Technology, research the feasibility of customizing website content for individual users based on user-selected topics and actual use of the site.	
Social media channels are managed and monitored to ensure a steady rise in engagement and alternate sources for members to receive information.	
Print and digital collateral adheres to the AAR brand and is member centric and speaks to AAR’s value proposition.	
Communication statistics are compiled and reviewed monthly.	
Establish AAR as a source of credible information about Arizona real estate issues.	
Utilize various mediums for communication with the REALTOR® member and public on issues of importance within the community and, in conjunction with LPA, provide a toolkit for the local associations and Regional Vice Presidents for implementation of REALTOR® Party resources.	
Organize information for easy search and access by members.	

In conjunction with the Risk Management Committee, create and promote a webpage that includes safety education, incident recordation and contemporaneous incident notification via a REALTOR® text alert system.	
Communicate with our members via their preferred communications method.	
Communicate the value and successes of the REALTOR® association throughout the state.	
Provide a consistent voice at AAR which will speak to trends, market statistics, and advocacy efforts with a focus on consumer outreach and education to the public.	
Solicit community outreach efforts conducted by REALTOR® members and recognize them through an annual award.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**CONSUMER OUTREACH**

AAR will demonstrate engagement in not less than four meaningful consumer engagement activities annually.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Promote market statistics and/or real estate trends and issues.	
Promote the value proposition of using a REALTOR® and/or engaging in community activities which enhance the image of the REALTOR®.	
Engage the public in legislative/political issues that impact real estate and related issues.	
Organize human resources or fundraising for the benefit of charitable/community organizations.	
Promote REALTORS® as professionals.	

Solicit community outreach efforts by REALTOR® members, local associations and MLS' and recognize them through an annual award.	
Promote the value of using REALTORS® in every transaction.	

**Recommendations:**

Continue basically as-is

Continue with the following – **engage media and market experts to assist in achieving AAR’s outreach goals.**

Discontinue

**EXECUTIVE COMMITTEE**

AAR is an effective member directed, fiscally responsible, non-profit corporation. AAR offers a value package that enhances members’ abilities to conduct their businesses with integrity and competency.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

**1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision

**2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.

**3.** AAR is the most powerful and influential political force in Arizona.

**4.** AAR provides members unsurpassed risk management tools.

**5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

**6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Leadership engages with local association leadership to strengthen the strategic partnership.	
Assist President-elect and First Vice President with selecting primary committee chairs, vice chairs and association executive representative for 2017 to be approved by ExCom and BOD at Spring meetings.	
Assist President-elect in identifying members, scheduling and organizing planning session for 2017. Coordinate Planning Session outcomes, distribute to attendees for comment. Distribute final plan.	
Update AAR officer position description and activity checklists. Distribute job descriptions and budgeted expense and reimbursement expectations to line officers and executive committee members.	
Provide effective legal advice.	
Operate in compliance with bylaws, policies and applicable laws.	
Communicate upcoming meeting times and agendas effectively.	
Evaluate and/or approve funds for innovative programs, products and/or services as submitted.	
Evaluate and/or approve agreements that benefit AAR members.	

Draft, update and distribute meeting agendas and materials for Executive Committee meetings in January, March, June, August and October in a timely manner.	
Maintain at least 80% attendance by committee members.	<ul style="list-style-type: none"> <li>• ___% - January ExCom meeting</li> <li>• ___% - April ExCom meeting.</li> <li>• ___% - June ExCom meeting</li> <li>• ___% - 2017 Budget meeting</li> <li>• ___% - October ExCom meeting</li> </ul>

**Recommendations:**

- Continue basically as-is  
 Continue with the following modifications  
 Discontinue

**BOARD OF DIRECTORS**

AAR is an effective member directed, fiscally responsible, non-profit corporation. AAR offers a value package that enhances members’ abilities to conduct their businesses with integrity and competency.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Determine real estate firm representatives for 2017 BOD based on 12/31/15 membership numbers.	
Establish recommendations for allocation of surplus from 2015 operating budget for BOD approval.	
Begin 2017 officer election process. Announce deadline and application submission dates. Submit 2017 candidate statements for website and BOD vote.	
Provide effective legal advice.	
Operate in compliance with bylaws, policies and applicable laws.	
Communicate upcoming meeting times and agendas effectively.	
Evaluate and/or approve funds for innovative programs, products and/or services as submitted.	
Draft, update and distribute meeting agendas and materials for the Board of Directors meetings in a timely manner.	

Maintain at least 80% attendance by Directors.	<ul style="list-style-type: none"> <li>• ___% - April meeting</li> <li>• ___% - October meeting</li> </ul>
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**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**ASSOCIATION RELATIONS**

AAR partners with and collaborates with local member associations, MLSs and other industry partners to accomplish mutual goals. AAR leadership engages with local association leadership to strengthen the strategic partnership.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Review and approve annual local association Mandatory Core Standards certification.	
Plan and present annual Arizona AE Workshop.	
Deliver timely information and updates to AEs on AAR activities.	
Coordinate with local associations regarding NAR's Association Executive Institute.	
Figure 2016 director entitlements for local associations using 12/31/14 membership report.	
Determine which Arizona AEs are eligible to serve on 2016 BOD.	
Partner with local association to provide new REALTOR® orientation resources to include AAR.	
Create a system to monitor success of orientation programs with new members.	
Be a resource and provide tools for local associations to communicate their relevance to members.	
Encourage local associations to collaborate with local community leaders, organizations, the public and REALTOR® members on involvement and reinvestment in the community, with a focus on available grants and programs offered through the REALTOR® Party resources.	
Encourage communication and collaboration with associations and MLSs regarding the member experience.	



Maintain a collaborative working relationship with the ADRE.	
AAR cultivates strategic alliances and partners with MLSs, institutes, societies, councils, and other homeownership entities on endeavors that benefit the membership.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**NATIONAL ASSOCIATION**

AAR is regarded as an influential voice and partner to the NATIONAL ASSOCIATION OF REALTORS®.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Make recommendations to NAR for committee/officer positions.	
Coordinate NAR meeting calendar with CEO and line officers and communicate expectations effectively, through preferred methods.	
Coordinate attendance at NAR Mid-year meetings	
Coordinate attendance at NAR Expo/Conference	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**REGION 11**

AAR, as a member of Region 11, plays a vital role in its influence on NAR policy and decision making. AAR is regarded as an influential voice and partner to the NATIONAL ASSOCIATION OF REALTORS®.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

\_\_\_\_\_ 6. AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Remain active in all NAR Region 11 activities (Caucus, Nominating Committee, Strategic Planning Committee).	
Assist in coordinating and attend Region 11 Conference.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**DUES/FINANCIAL**

AAR is an effective member directed, fiscally responsible, non-profit corporation. Annual dues collected by the Arizona Association of REALTORS® are used to ensure its members are the best prepared real estate professionals with the highest standards.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3. AAR is the most powerful and influential political force in Arizona.
- 4. AAR provides members unsurpassed risk management tools.
- 5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6. AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Collect fully paid units from local associations.	
Evaluate annual budget to ensure that dues are properly allocated to AAR’s policies, programs and services.	
Invoice and update member-at-large.	
Prepare, analyze and distribute monthly financials to the Executive Committee for review and to ensure the association’s financial goals are being met.	
Analyze current program and/or service contracts to ensure best product and pricing are incorporated.	
Prepare suggested budget adjustments, if necessary, for ExCom consideration.	
Monitor: <ul style="list-style-type: none"> <li>• capital reserve fund account balances</li> <li>• operating and strategic initiative reserve accounts</li> <li>• RAPAC and Issues Mobilization accounts</li> </ul> and ensure that adherence to investment policy and approved expenditures are within budgetary	

amounts. Ensure bylaw requirements are adhered to.	
Reconcile all AAR checking accounts (AAR, ARDAF, ARFHCO, RAPAC, Issues Mob, etc).	
Establish recommendations for allocation of surplus from previous year's operating budget for ExCom approval.	
Assist with the annual audits.	
Prepare initial 2017 Operating and Capital budget.	
Finalize 2017 Operating and Capital budget with the 2017 Executive Committee and Board of Directors.	
Continue to proactively research and review options for AAR efficiency improvement.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**BUILDING**

AAR's building is an asset and its equity will be vigilantly monitored.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Review maintenance needs and report critical issues to ExCom.	
Assist property manager in working with tenants to maintain current lease agreements.	
Investigate alternatives for use of unleased building space.	
Conduct thorough review of Arizona REALTORS® building infrastructure and make recommendations for needed improvement in the 2017 Capital Budget.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**PERSONNEL/OVERHEAD**

In order to accomplish the Strategic Plan, area business plans deliver member value and work as a collaborative partner with national and local member associations. AAR must have knowledgeable staff that can serve as leaders in the industry.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

**1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision

**2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.

**3.** AAR is the most powerful and influential political force in Arizona.

**4.** AAR provides members unsurpassed risk management tools.

**5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

**6.** AAR supports the success of REALTOR® members with business services.

Measurable objectives	Status
Analyze personnel/overhead needs based on the Association's business plans.	
Retain a well-trained, capable staff.	
Maintain positive customer and professional staff response.	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue

**ARIZONA REALTORS® DISASTER ASSISTANCE FOUNDATION  
(ARDAF)**

The Foundation is a separate 501(c)(3) corporation. The Foundation provides a fund to collect and distribute tax deductible donations from members and the general public to be used to assist those who have suffered from a personal or natural disaster.

Measurable objectives	Status
Coordinate annual audit.	
Provide in-kind staff time to effectively manage 501(C)(3) per its bylaws.	
Prepare and distribute local association funds and reports.	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue

**ARIZONA REALTORS® FOUNDATION FOR HOUSING AND  
COMMUNITY OUTREACH (ARFHCO)**

The Foundation is a separate 501(c)(3) corporation. The Foundation provides education opportunities to AAR members as well as an EAH program to state and local association employees.

Measurable objectives	Status
Coordinate annual audit.	

Provide in-kind staff time to effectively manage 501(C)(3) per its bylaws.	
Communicate and promote education and EAH opportunities to AAR members.	
Provide in-kind staff time to develop pre-eminent education per the Foundation's goals.	
Implement Ira Gribin grant plans as submitted to NAR.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Federal Liaison Support (1575) provides support for direct contact with Members of the United States Congress (House of Representatives and Senate) by selected members serving as Federal Political Coordinators (FPCs). This program also includes direct member contact through the annual “hill visits” held in the spring during the NAR REALTORS® Legislative Meeting and Trade Expo. The budget should provide for travel expenses for all FPC’s, and at least two governmental staff positions.*

**Brief description of how the PPSA contributes to achieving AAR’s vision:**

*Member contact with Members of Congress (MOC) improves efforts to maintain a positive business environment, which enables real estate practitioners (their clients and customers) to be successful in real estate activities.*

**Importance of PPSA to the critical-to-serve customer:**

*Congress regularly addresses legislation affecting real estate (e.g. property, tax, and employment) and other areas of critical importance to the viability of the industry. This program provides vital administrative and financial support to insure that our federal delegation understand the effect of those issues on their constituents.*

**Strategic Focus Area:** [Indicate which focus point is addressed by the PPSA.]

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

1. AAR governmental staff maintains at least quarterly communication between NAR political staff and FPC’s on federal issues and the positions taken by each Arizona Member of Congress to enhance our FPC efforts while at Washington, D.C. meetings and throughout the year
2. All FPCs are registered with NAR’s REALTOR® Action Center

3. All FPCs to maintain quality contact with their representative or their staff within Arizona and attend required meeting and fundraisers
4. Each FPC team will hold one in-district meeting locally with their congressman/senator or their staff during the year
5. Each FPC will attend at least one training session, if needed, on their roles and responsibilities
6. AAR governmental staff maintains strong liaison with Congressional staff within Arizona through ongoing contacts on issues important to Arizona REALTORS®
7. Attendance at meetings with Members of Congress during the NAR Hill Visits is by invitation only
8. FPCs meet any NAR requirements

**Measurable Objectives Progress:**

*1. Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

Target: FPC's and members who have are interested or have relationships with Members of Congress.

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Fundraising/Grassroots Support (1560) includes administrative and staff support for RAPAC fundraising efforts. Consideration of all fundraising activities will be given.*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

*Providing impact and clout for our local, state, and national legislative program, RAPAC funds provide for support of political candidates at all levels and political training for members and staff. AAR and NAR could not continuously boast success at all levels without the support of these funds.*

**Importance of PPSA to the critical-to-serve customer:**

*In order to be and remain a major legislative player, AAR needs these tools to support its legislative goals, which work to provide the most positive environment for real estate success. Our involvement in campaigns gives us the ear of legislators early in the process and demonstrates our commitment to the process. Members benefit through legislation, which improves their bottom line and decreases liability. Local associations also benefit from assistance with fundraising.*

**Strategic Focus Area:** *[Indicate which focus point is addressed by the PPSA.]*

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

1. The political activities fundraising plan is finalized by December 31<sup>st</sup> by the previous plan year
2. Identify members to participate in regional fundraising structure and hold orientation meetings with specific goals assigned



3. 100% participation level of RAPAC contributions from state and NAR directors, AEs, Presidents, Presidents-elect, RVPs, RIMC, LPAC, Legislative Committee, RAPAC Trustees, EXCOM, BOD, and local RAPAC Chairs will be the goal
4. A minimum of at least one (1) visit or tele/video conference with local associations by AAR representatives to promote fundraising activities will be accomplished by January and October annually
5. Ninety-five (95) sterling “R” members, (10) Crystal “R”, (14) Golden “R”, three Platinum “R” members for 2016
6. Fundraising tips for local associations to implement with the assistance of the local association RAPAC volunteers and AAR Government Affairs staff will be provided
7. Identify alternative ways to train local RAPAC chairs on fundraising strategies (i.e., attend NAR PAC training and Webinars)
8. Reach NAR RPAC goal by direct RAPAC contributions. Reach 50% of goal by March 31; Reach 75% of goal by May 31; Reach 100% of RPAC goal by September 30
9. State-level candidates to receive funds are evaluated on AAR legislative policies and voting record
10. Ensure state and federal election law requirements are conveyed so that RAPAC remains in compliance at the state and federal levels
11. Promotional materials, including fundraising tools for local associations are produced and distributed
12. A fundraising event benefiting RAPAC is held at the Spring Conference/Convention
13. A fundraising event is held at the Leadership Conference
14. Major RAPAC donors are recognized on aaronline.com
15. Provide tools to members to help them understand the value of RAPAC
16. Encourage and educate members to share the value of RAPAC
17. Continue to provide assistance, examples, fundraising ideas and messaging to achieve 100% of RAPAC goal
18. Yodel our RAPAC achievements to current and new members, with a focus on the wins and money saved by RAPAC for homeowners and the REALTORS® business
19. Provide training and support for the local Associations on how to identify and engage REALTOR® Party champions

**Measurable Objectives Progress:**

*1. Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

Target: The entire REALTOR® membership is the target group for RAPAC fundraising. Methods to reaching the determined goals of RAPAC will be the use of push technology (broadcast emails, list serves), presentations at board meetings, one-on-one solicitations, and various fundraising events. Complete details of these methods and their respective timelines are outlined in each year’s fundraising plan.

**Recommendation(s):** *(To be determined upon completion of the activity.)*

\_\_\_\_\_Continue basically as-is

X     Continue with following modification(s)  
           Discontinue

Increased numbers for the Major Investors from Thirty (30) sterling “R” members, five Golden “R” and two Crystal “R” members for 2015 to Ninety-five (95) sterling “R” members, (10) Crystal “R”, (14) Golden “R”, three Platinum “R” members for 2016. Added the following items that were generated from the 2016 Strategic Planning Session:

- Provide tools to members to help them understand the value of RAPAC
- Encourage and educate members to share the value of RAPAC
- Continue to provide assistance, examples, fundraising ideas and messaging to achieve 100% of RAPAC goal
- Yodel our RAPAC achievements to current and new members, with a focus on the wins and money saved by RAPAC for homeowners and the REALTORS® business
- Provide training and support for the local Associations on how to identify and engage REALTOR® Party champions

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Governmental Communications (1585) includes all publications and electronic communications to members regarding governmental issues, programs and services including: Convio/REALTOR® Party Hub; voter registration; Capitol Insider; issue briefing papers as necessary; related press releases; the Voice, and Calls to Action on issues.*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

*Ongoing communication about governmental services plus soliciting feedback from members is vital to the members being the "most prepared" real estate practitioner by quick identification of new or proposed laws or rules affecting their business.*

**Importance of PPSA to the critical-to-serve customer:**

*The critical-to-serve customers' success is enhanced by being the "first-to-know" current issues and laws.*

**Strategic Focus Area:** *[Indicate which focus point is addressed by the PPSA.]*

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.

2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.

3. AAR is the most powerful and influential political force in Arizona.

4. AAR provides members unsurpassed risk management tools.

5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

6. AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

- User-friendly legislative updates through Capitol Insider emails are provided during the legislative session
- Issue briefing papers on AAR proposed legislation (including pros and cons), as needed, prior to and during the legislative session.
- Calls to Action responses will be provided, when necessary, for targeted and effective immediate member communication with Arizona legislators and Members of Congress on critical issues
- Current information on each governmental program is maintained for distribution on aaronline.com

- Press releases and selected issue briefings are prepared on an as needed basis
- Ongoing updates about governmental activities through the Voice are provided outside the legislative session as needed
- Information on how Issues Mobilization and RAPAC reserves can enhance local association legislative objectives will be provided to locals at least once a year
- Emphasize the importance of AAR’s legislative/political successes to members
- Implement a mechanism by which members can relay, on a year round basis, legislative comments and proposals
- Utilize the broker involvement program/stipend to identify and train a local broker for grassroots education efforts on participation in NAR calls for action
- Build tools and provide consistent messages, which enable members to explain how REALTORS® directly provide value to and protect private property rights

**Measurable Objectives Progress:**

*1. Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

The entire membership is the ultimate market target; with specific concentration on broker education for success.

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue

*Changed the mechanism for ongoing updates about governmental activities through the Voice are provided outside the legislative session as needed, previously this stated updates through the Capitol Insider. Added the following items that were generated from the 2016 Strategic Planning Session:*

- Emphasize the importance of AAR’s legislative/political successes to members
- Implement a mechanism by which members can relay, on a year round basis, legislative comments and proposals
- Utilize the broker involvement program/stipend to identify and train a local broker for grassroots education efforts on participation in NAR calls for action
- Build tools and provide consistent messages, which enable members to explain how REALTORS® directly provide value to and protect private property rights

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Governmental Area Support (1501) includes administrative support (postage, copying for all governmental programs, meeting supplies, lunches, etc.). Support for governmental-related work groups and committees (such as the Legislative Committee, REALTORS® Issues Mobilization Committee, RAPAC Trustees and an estimated 8-12 work groups during the year) is necessary for effective functioning of such groups. Includes various governmental affairs staff travel expenses.*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

*The function and existence of the Legislative and Political Affairs Committee, the Legislative Committee, REALTORS® Issues Mobilization Committee, and RAPAC Trustees assumes that the work was created based on the needs of the association to meet its vision. Support for governmental area-related work groups is necessary for effective functioning of such groups.*

**Importance of PPSA to the critical-to-serve customer:**

*The nature of governmental affairs/public policy requires careful planning, immediate response, and coordination. This function meets the immediate public policy needs of the membership, and plans for future needs. All government affairs programs are geared toward enabling the practitioner to be the most prepared.*

**Strategic Focus Area:** *[Indicate which focus point is addressed by the PPSA.]*

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

1. Assigned tasks to all governmental area work groups within approved budget parameters are completed

**Measurable Objectives Progress:**

*1. Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

*N/A*

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Legislative Advocacy (1510) includes our ongoing legislative program: research, coalition-building, liaison activities, lobbying, staff and member training, plus Vice President Government Affairs in-state travel as well as other training and networking conferences. Also includes a contingency fund for contract lobbying services and contracted research as required.*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

*This effort is a large portion of the Association's goal to provide the best business environment for real estate activity. Its individual vision is the most effective influential political entity in Arizona.*

**Importance of PPSA to the critical-to-serve customer:**

*A positive legislative and regulatory climate is a necessity for the critical-to-serve customer to thrive in the real estate business.*

**Strategic Focus Area:** *[Indicate which focus point is addressed by the PPSA.]*

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.

2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.

3. AAR is the most powerful and influential political force in Arizona.

4. AAR provides members unsurpassed risk management tools.

5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

6. AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

- Broad-based representation of AAR membership involved in member lobbying activities through Legislative Committee appointments, and related Committee activities
- Relationships are strengthened with Arizona statewide officeholders and agency department heads
- Relationships with housing industry partners are improved and maintained through ongoing communication on specific issues
- A combined minimum of an 85% success rate on actively supported and actively opposed legislation accuracy

- Necessary research on upcoming or current legislative or regulatory issues is performed on a timely basis
- Daily monitoring of legislative issues that need grassroots or other association response is maintained
- Member involvement in political campaigns is monitored
- A list of government agencies important to the real estate industry is established and monitored for vacancies in order to make recommendations for appointments
- A proposed 2016 legislative priority list is finalized by October 2015
- A system of prioritization of legislative positions is maintained throughout the legislative session
- Coordinate with the necessary department(s) with changes to the ADRE licensing and business standards requirements
- Continue to follow the Legislative Policy Statements
- Proactively advance legislation that benefits REALTORS® and private property rights

**Measurable Objectives Progress:**

*1. Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

Target is primarily legislative and regulatory groups and to some degree, the membership at-large. Vice President of Government Affairs and governmental affairs staff will provide necessary information on bills and AAR’s position along with rationale on a regular basis during the session.

AAR’s legislative program, in general, will be promoted to the general membership through articles and visits to local associations and to firms by governmental affairs staff and AAR representatives.

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue

*Changed the requirement to coordinate with the Professional and Business Development Area with regard to potential assistance with changes to the ADRE licensing and business standards requirements to coordinate with the necessary department(s) with changes to the ADRE licensing and business standards requirements. Added the following items that were generated from the 2016 Strategic Planning Session:*

- Continue to follow the Legislative Policy Statements
- Proactively advance legislation that benefits REALTORS® and private property rights



**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Legislative Policy Development (1550) includes ongoing solicitation of member feedback on current or future issues that could affect the real estate business and their livelihoods. Includes the annual REALTOR® Caucus session. Includes all support for building and fostering relationships with legislators and provides for governmental education of members; in-depth review of association legislation issues, targeted meetings with legislators and other events to show the potential REALTOR® impact on governmental action. Also includes holding special events for Arizona Legislators to meet with AAR Leadership (Legislative and AAR) at the beginning of and towards the end of the legislative session to discuss current issues and to get more acquainted.*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

*Provides for identification and prioritization of association legislative positions by members and contributes to the goal of most prepared practitioner. Legislator Events activities assist AAR in nurturing and strengthening important political relationships as well as promoting public policy activity to the achievement of the ideal business environment for real estate practitioners.*

**Importance of PPSA to the critical-to-serve customer:**

*A body of legislative positions identified by a broad representation of members provides for a more cohesive and stronger voice at the legislature. Allows for the AAR legislative program to be stronger and more effective and works to insure that the critical-to-serve customer will be in a better position to be successful. These efforts are an integral part of a strong legislative voice by AAR to reach the goals of developing influence and addressing issues important to the future real estate industry and property ownership, all of which assist the practitioner to attain ongoing business success.*

**Strategic Focus Area:** [Indicate which focus point is addressed by the PPSA.]

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
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- 6.** AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

1. Members are polled for their opinions through increased use of formal and informal methods and attendance by governmental staff and volunteers at state, regional and local association meetings
2. Stakeholders are included on issues for discussion at REALTOR® Caucus
3. Proportional representation at the Caucus is encouraged
4. All legislative recommendations are forwarded to the Legislative and Political Affairs Committee for review and appropriate action
5. REALTOR® Day event is held in 2016
6. Identify and hold a second legislator event in 2016
7. Attendance of 65% of legislators at legislator events is achieved
8. Attendees for legislator events are identified through political involvement and leadership activity

**Measurable Objectives Progress:**

1. *Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

1. Market event(s) to identified participants
2. Market event(s) to legislators as a more social event not focused on legislative issues
3. Promote the event through technology and other venues that will hit the target market
4. Events can be re-evaluated and to fit grassroots efforts needed at the time; e.g. campaign rollout/education.
5. Local Associations
6. All members, Legislative Committee, RAPAC Trustees, RIMC members, LPAC members
7. New members, brokers and managers
8. All Capitol Insider users and *Voice* recipients
9. All past REALTOR® Caucus attendees

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Local Lobbying Support (1545) includes plans to support local lobbying activities by local associations in order for them to be able to address important local issues that could have a statewide impact. This program is designed to assist local associations with the expenses related to a shared Government Affairs Director (GAD).*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

*Ongoing threats to property rights and other issues affecting real estate often begin at the local level. It is important that AAR stay on top of local issues and identify potential statewide concerns in order to be prepared to address concerns affecting a positive real estate business climate.*

**Importance of PPSA to the critical-to-serve customer:**

*Monitoring and addressing, when necessary, local issues provides an early warning of upcoming issues and assists local associations to support or defeat legislation affecting their members by providing professional expertise and financial support.*

**Strategic Focus Area:** *[Indicate which focus point is addressed by the PPSA.]*

**1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.

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**3.** AAR is the most powerful and influential political force in Arizona.

**4.** AAR provides members unsurpassed risk management tools.

**5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

**6.** AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

1. Individual plans to assist local lobbying efforts, as issues arise, are developed and implemented as necessary
2. Establishment of local advocacy program by local associations is encouraged and assistance is provided as requested
3. Consider hiring a lobbying firm, as needed, to assist on local issues

**Measurable Objectives Progress:**

1. *Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

Target: local association leadership (in order to identify members with interest) and members-at-large.

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Political Research (1596) provides for research through polling, etc. on a statewide basis, as needed. AAR anticipates more involvement in transportation, infrastructure and similar issues that directly affect the future of real property availability and value.*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

*This effort will benefit AAR's political influence by providing information to support or otherwise influence proposed or sponsored statewide and local legislation/initiatives.*

**Importance of PPSA to the critical-to-serve customer:**

*This program provides the research necessary for AAR to monitor and address issues, when necessary, to support or defeat legislation affecting members by providing polling and other critical information.*

**Strategic Focus Area:** *[Indicate which focus point is addressed by the PPSA.]*

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
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- 4.** AAR provides members unsurpassed risk management tools.
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- 6.** AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

- 1. Provide current information and polling data on an as needed basis*

**Measurable Objectives Progress:**

- 1. Please refer to Measurable Objectives tracking document*

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

N/A

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

*Election Year Activities (1580) includes plans for identifying member legislative districts, voter registration, REALTOR® voting activities and the candidate selection process. These activities will help strengthen REALTOR® political involvement in preparation for election years.*

**Brief description of how the PPSA contributes to Association achieving its vision:**

*As participation in voter activities by member's increases, use of association and RAPAC dollars must produce our goal of a real estate-friendly legislature and improve our relations at other levels of government. Legislative advocacy success is directly tied to electoral success. An effective election year activity helps to assure member participation and success of our goals.*

**Importance of PPSA to the critical-to-serve customer:**

*Only through careful attention to active voting by REALTORS® can we help elect individuals at the state and local level to enhance and protect the real estate business. A positive legislative climate assists the critical-to-serve customer meet their business objectives.*

**Strategic Focus Area:** [Indicate which focus point is addressed by the PPSA.]

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision

2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.

3. AAR is the most powerful and influential political force in Arizona.

4. AAR provides members unsurpassed risk management tools.

5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.

6. AAR supports the success of REALTOR® members with business services.

**Measurable objectives:**

1. Members are encouraged to vote and to update their voting registration due to new residence or change of name or party and will be directed to resources to determine their voting district information. Look into a prominent "Get Out the Vote" campaign
2. Information on members' legislative districts is kept as current as possible
3. Members' primary home addresses are collected to determine legislative districts and registration information and create database on same
4. Primary and General Election Voter Guides on candidates for the Arizona Legislature and state officeholders are developed and distributed

5. Meetings in local areas for candidate interviews and selections are financially included in government affairs budget
6. Identify and educate supportive REALTORS® who want to run for political office

**Marketing Strategy (if applicable):** *What/who is the target and describe marketing methods to be used.*

Target is all members. Promote the importance of voting and updating voter registration through aaronline.com, Capitol Insider, the Voice and Voter Guide.

**Recommendation(s):** *(To be determined upon completion of the activity.)*

- Continue basically as-is
- Continue with following modification(s)
- Discontinue



**AAR Risk Management Committee  
2016 Business Plan**

**FROM:** Risk Management Committee (RMC)  
**Chairman:** Gerry Russell  
**Vice Chairman:** Evan Fuchs  
**RMC Liaison:** Scott M. Drucker  
**DATE:** January 1, 2016

**REALTOR®... the best prepared real estate professional with the highest standards.**

The following are programs, products, services and activities (PPSA's) with Risk Management Committee oversight.

**PROFESSIONAL STANDARDS**

**Professional Standards Administration** is the processing of ethics complaints and arbitration requests. This program involves:

- **Grievance Committee (GVC):** Process complaints/monthly meetings
- **Professional Standards Committee (PSC):** Schedule and staff hearings
- **Professional Standards Policy and Training Workgroup:** Reviews policies and implements training
- **Mediation Program**
- **Ombudsman Program**

**Brief description of how the PPSA contributes to achieving AAR's vision:** Professional Standards is what sets REALTORS® apart from other licensees and is a real solution to enforcing the highest standards.

**Importance of PPSA to the critical-to-serve customer:** Professional Standards is of critical importance to those aspiring to the AAR Purpose.

**Strategic Focus Points:** [Indicate one(s) the PPSA address(es)]

- 1.** AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2.** AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3.** AAR is the most powerful and influential political force in Arizona.
- 4.** AAR provides members unsurpassed risk management tools.
- 5.** To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6.** AAR supports the success of REALTOR® members with business services.

**Measurable Goals:**

Measurable objectives	Status
• GVC: Prompt review of complaints	
• PSC: Complete ethics cases promptly	
• PSC: Complete arbitrations promptly	
• Update PS policy adaptations as necessary	
• Reinforce, on a continuing basis, AAR PS benefits and results	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Mediation Program** This program involves facilitating mediations to resolve ethics complaints and arbitration requests.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** The Mediation Program is a real solution for members involved in a dispute.

**Importance of PPSA to the critical-to-serve customer:** Early dispute resolution is of critical importance to those aspiring to the AAR Purpose.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Facilitate mediation requests on a timely basis</li> </ul>	
<ul style="list-style-type: none"> <li>• Receive positive feedback from mediation evaluations</li> </ul>	
<ul style="list-style-type: none"> <li>• Maintain list of qualified mediators</li> </ul>	
<ul style="list-style-type: none"> <li>• Update mediation policies and procedures as necessary</li> </ul>	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Ombudsman Program** This program involves taking complaint calls/emails and facilitating Ombudsman contact to attempt resolution.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** The Ombudsman Program is a real solution for the public when members are involved in a dispute or miscommunication.

**Importance of PPSA to the critical-to-serve customer:** Early dispute resolution is of critical importance to those aspiring to the AAR Purpose.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Facilitate ombudsman requests on a timely basis</li> </ul>	
<ul style="list-style-type: none"> <li>• Receive positive feedback from ombudsman evaluations</li> </ul>	
<ul style="list-style-type: none"> <li>• Maintain list of qualified ombudsmen</li> </ul>	
<ul style="list-style-type: none"> <li>• Update PS policy adaptations as necessary</li> </ul>	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Professional Standards, Mediation, and Ombudsman Education and Training**

This program includes training for members of Grievance and Professional Standards Committees and AAR Mediators and Ombudsmen.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Professional Standards is a real solution for members and is critical to achieving the highest standards.

**Importance of PPSA to the critical-to-serve customer:** Professional Standards, Mediation and Ombudsman training is of critical importance to those aspiring to the AAR Purpose.

**Measurable Goals:**

Measurable objectives	Status
• Offer PS Training for GVC and PS Committee	
• PS Policy & Training Workgroup meeting	
• Offer Mediator training	
• Offer Ombudsman training	
• Offer hearing panel chair training	
• Publish PS, Mediation and Ombudsman information	
• PS outreach to members	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Buyer-Seller Dispute Resolution** This program provides alternative dispute resolution options (mediation or arbitration) for buyers and sellers to resolve disputes or claims arising out of the AAR purchase contract.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** The Buyer-Seller Dispute Resolution program is a real solution that provides buyers and sellers an effective and affordable means to resolve their disputes outside of the court system.

**Importance of PPSA to the critical-to-serve customer:** Providing buyers and sellers with a way to resolve their disputes is pivotal to our members’ real estate practice.

**Measurable Goals:**

Measurable objectives	Status
• Offer an effective Buyer-Seller Dispute Resolution program	
• Recruit effective Buyer-Seller Dispute Resolution providers	
• Ensure compliance of Buyer-Seller Dispute providers with program’s directives	
• Receive positive feedback from Buyer-Seller Dispute Resolution program evaluations	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**RISK MANAGEMENT**

**Forms Development** This program involves:

**Creation of workgroups**

**Drafting** - Draft new forms as needed and revise current forms

**Education** - Forms information updates on website, emails and other communication vehicles.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** The contracts, addenda and related forms are the core of the member’s business and a real solution to the issues that arise in a real estate transaction.

**Importance of PPSA to the critical-to-serve customer:** The contracts, addenda and related forms are critical to our members’ real estate practice.

**Strategic Focus Points:** [Indicate one(s) the PPSA address(es)]

- 1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3. AAR is the most powerful and influential political force in Arizona.
- 4. AAR provides members unsurpassed risk management tools.
- 5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6. AAR supports the success of REALTOR® members with business services.

**Measurable Goals:**

Measurable objectives	Status
• Workgroups formed as necessary	
• Protect our forms copyright	
• Forms drafted or revised for introduction in February, June and October	
• Deliver timely forms information/education	
• Develop educational kit for teams on best practices and guidelines	
• Develop a customizable broker tool kit for management of teams	
• Create and promote a webpage that includes safety education, incident recordation and contemporaneous incident notification via a REALTOR® text alert system.	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Legal Hotline** This program allows designated brokers/managers to call in to the Hotline attorneys for answers to real estate-related legal questions, and includes:

- Program maintenance and monitoring
- Review of letters of opinion/articles for publication

**Brief description of how the PPSA contributes to achieving AAR’s vision:** The Hotline is a real solution to provide needed guidance to members on specific situations or transactions.

**Importance of PPSA to the critical-to-serve customer:** Timely legal guidance is crucial to the members.

**Measurable Goals:**

Measurable objectives	Status
• Promote Hotline usage	
• Hotline to prepare ten Q&As on current issues/current “hot topics” six times per year for the Arizona REALTOR® Voice and AAR website	

<ul style="list-style-type: none"> <li>• Hotline to maintain statistics on number and types of calls in cooperation with AAR staff</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline attorney to attend AAR Risk Management Committee or Workgroup meetings as requested</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline attorney to review new or revised AAR forms and notify AAR of any legal concerns or recommendations</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline attorney to consult with AAR General Counsel on legal issues as requested</li> </ul>	
<ul style="list-style-type: none"> <li>• Evaluate Hotline program by surveying members</li> </ul>	
<ul style="list-style-type: none"> <li>• Form Hotline Workgroup to evaluate program</li> </ul>	

**Recommendations:**

- Continue basically as-is  
 Continue with the following modifications  
 Discontinue

**Industry Issues** This program involves addressing current industry issues.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Addressing industry issues as they arise is a real solution to provide needed guidance to members on specific situations or transactions.

**Importance of PPSA to the critical-to-serve customer:** Guidance on industry issues as they arise is crucial to the members.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Develop system to maintain claims statistics to identify liability trends</li> </ul>	
<ul style="list-style-type: none"> <li>• Foster alliances with defense attorneys and E&amp;O carriers and mediators</li> </ul>	
<ul style="list-style-type: none"> <li>• Monitor medical marijuana legal conflicts and keep members informed as the issue evolves</li> </ul>	
<ul style="list-style-type: none"> <li>• Educate agents on potential ethical and legal liabilities associated with off-market listings and private listing clubs</li> </ul>	
<ul style="list-style-type: none"> <li>• Increase promotion and education of RESPA-TILA changes; respond to changes and monitor</li> </ul>	

**Recommendations:**

- Continue basically as-is  
 Continue with the following modifications  
 Discontinue

**Legal & Industry Publications** This program includes:

- Risk Management articles for AAR publications, ASREB Journal and other publications
- Articles on emerging legal issues for AAR publications, ASREB Journal and other publications
- *Arizona Real Estate: A Professional’s Guide to Law and Practice*
- AZ Broker/Manager Quarterly
- Buyer Advisory
- Short Sale Seller Advisory
- Lease Owner’s Advisory

- Tenant Advisory
- Legal information and risk management information on website (Short Sales blog, Scams & Frauds webpage)
- Spanish translations
- Risk Management brochures

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Our members need current, accurate, and timely legal, legislative, and risk management updates and information to reduce liability and insure their business success. These publications are a real solution that assists our members in achieving the AAR Vision.

**Importance of PPSA to the critical-to-serve customer:** Current, accurate, and timely legal, legislative and risk management updates and information are of critical importance to our members.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Distribution of time sensitive legal and risk management information and articles</li> </ul>	
<ul style="list-style-type: none"> <li>• Deliver Arizona Broker/Manager Quarterly</li> </ul>	
<ul style="list-style-type: none"> <li>• Maintain advisories as necessary : Buyer Advisory, Short Sale Seller Advisory, Lease Owners Advisory, Tenant Advisory</li> </ul>	
<ul style="list-style-type: none"> <li>• Maintain and update legal, risk management, fair housing, and international real estate content on AAR website as necessary</li> </ul>	
<ul style="list-style-type: none"> <li>• Update written publications as necessary</li> </ul>	
<ul style="list-style-type: none"> <li>• Promote use of legal &amp; industry publications</li> </ul>	
<ul style="list-style-type: none"> <li>• Promote and continue to develop resources that assist brokers in operating a brokerage that is of value to the public, agents, and the real estate industry (i.e. risk management, legal hotline, etc.).</li> </ul>	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Legal and Legislative Outreach and Education** This program includes:

- Speaking/teaching at local associations and member firms on legal issues and new legislation.
- Program participant in legal components of Winter Conference, Broker University, Partners Conference, Leadership Conference, educational outreach and other association programs.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** This plan provides a real solution for delivering timely Arizona-specific legal, legislative, and risk management information and education to members.

**Importance of PPSA to the critical-to-serve customer:** To succeed in real estate and attain the AAR Purpose, it is essential that our members have access to timely Arizona-specific legal, legislative, and risk management information and education.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"><li>• Participation in legal and legislative programs</li></ul>	

**Recommendations:**

- Continue basically as-is  
 Continue with the following modifications  
 Discontinue

**Legislative Support** This program includes:

- Provide input on industry issues
- Assist AAR lobbyist in drafting legislation
- Promote laws that reduce member liability
- Testify at the legislature as needed on legislative issues
- Inform members of legislative issues and changes in conjunction with the Legislative and Political Affairs Committee.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Representation on legislative issues that affect AAR member’s livelihood and success is a real solution for members striving to achieve the AAR Purpose.

**Importance of PPSA to the critical-to-serve customer:** Protecting members’ legislative interests is key to allowing members the ability to achieve the AAR Purpose.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"><li>• Successful outcome in legislation supported and successful defeat of legislation opposed</li></ul>	

**Recommendations:**

- Continue basically as-is  
 Continue with the following modifications  
 Discontinue

**REGULATORY ISSUES** This plan includes:

- Communicate with ADRE and other administrative agencies such as ADEQ, ADWR, DFI, and BTR on regulatory issues
- Review and make recommendations on proposed administrative rules or policy changes
- Serve on ADRE or other state agency committees, when available and appropriate
- Assist AAR CEO and lobbyist in drafting and testifying on proposed rules

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Representation on regulatory issues that affect AAR members’ livelihood and success is a real solution for members achieving the AAR Purpose.

**Importance of PPSA to the critical-to-serve customer:** Protecting AAR and its members’ regulatory interests are fundamental to allowing members the ability to achieve the AAR Purpose.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"><li>• Negotiation of reasonable regulatory rules and policies that are acceptable to AAR members and do not hinder their success</li></ul>	
<ul style="list-style-type: none"><li>• Maintain contact with ADRE Advisory Board</li></ul>	
<ul style="list-style-type: none"><li>• Establish a regulatory agency workgroup</li></ul>	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**General Programs**

**Support:** This program includes support programs including:

- Continuing education
- State and County Bar dues
- Resource subscriptions
- Staff attendance at legal, legislative and industry meetings
- Copying and postage

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Provide critical support to accomplish the goals of this Committee’s programs and services.

**Importance of PPSA to the critical-to-serve customer:** The support services and resources allows the committee to provide AAR members with the most up-to-date information on Professional Standards, legal, legislative, regulatory and industry issues.

**Strategic Focus Points:** [Indicate one(s) the PPSA address(es)]

- 1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3. AAR is the most powerful and influential political force in Arizona.
- 4. AAR provides members unsurpassed risk management tools.
- 5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6. AAR supports the success of REALTOR® members with business services.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• All tasks assigned by the Committee are completed, updates and information provided to members after Professional Standards, continuing legal education class or industry meetings. General printing/postage/supply funds provide the tools to accomplish the area’s PPSAs</li> </ul>	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Related Activities without Direct Committee Oversight**

**Legal Counsel**

- Provide guidance to leadership and CEO on association legal concerns
- Review and advise on building/tenant issues and related contracts
- Review and advise on affinity agreements



- Prepare memoranda on legal issues as they arise
- Provide limited advice and guidance to local associations
- Respond to member inquires as appropriate

**Brief description of how the PPSA contributes to achieving AAR’s vision:** A real solution to leadership, CEO, committees, and local associations in developing programs with legal implications and effectively leading the association.

**Importance of PPSA to the critical-to-serve customer:** Allows the association to provide programs to assist members to be the best prepared with the highest standards.

**Strategic Focus Points:** [Indicate one(s) the PPSA address(es)]

- 1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3. AAR is the most powerful and influential political force in Arizona.
- 4. AAR provides members unsurpassed risk management tools.
- 5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6. AAR supports the success of REALTOR® members with business services.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• CEO, state leadership, committees, and local association executives are informed on legal issues and questions satisfactorily answered.</li> </ul>	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Litigation Support** Related activities without direct committee oversight:

- Draft Amicus Briefs and monitor litigation and potential litigation or disputes in which AAR has an interest
- Legal research and evaluation of claims or issues
- Preparation of pleadings, memos and correspondence relating to claims or issues
- Coordinate with outside counsel in the representation of AAR on any claims or issues

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Representation on legal issues that affect AAR member’s livelihood and success is a real solution that leads to more members living the AAR Purpose.

**Importance of PPSA to the critical-to-serve customer:** Protecting AAR and its members’ legal interests is key to allowing members the ability to achieve AAR’s Purpose.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Successful outcome in litigation and dispute resolution.</li> </ul>	

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 Professional & Business Development Business Plan**

**Program, Product, Service or Activity (PPSA):**

***Support & Resources***

This program includes support programs including:

- Copying, printing and postage
- Web platform enhancements
- Education mobile app development
- Resource subscriptions and license fees
- Staff attendance and training at industry meetings and conferences

**Brief description of how the PPSA contributes to achieving AAR's vision:**

This is a support budget for services and resources that contribute to the development, administration and offering of AAR's educational programs and products that provide high-level skill based and risk management programs that focus on member competencies (A-1) and that set the standard in quality and meaningful education that positions the REALTOR member to succeed (5A) and build a culture that emphasizes the benefits and value of lifelong learning (A-1).

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

Continue basically as-is

Continue with the following modifications: add allocation for marketing consultant to design a marketing campaign, focus groups and survey to assist in beginning to build a culture that emphasizes the benefits and value of lifelong learning and create connection between education and business success; add allocation for development on an education app housing class calendar, Reteach.us reviews, etc.

\_\_\_ Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	<b>Update</b>
Resources and tools are available to develop, offer, or market programs and products within the PBD business plan.	
A customized in-house online registration system is available and maintained	
Appropriate groups are updated throughout the year.	
A broad spectrum of delivery systems are available and are utilized to deliver education to the members.	
Staff continually develops the needed knowledge and skills to develop educational programs/products that are responsive to member needs and changes in the industry and technology tools	
Monitor and evaluate emerging trends in education industry and NAR educational activities.	
Promotional materials are produced and distributed to promote and create awareness of education programs and classes.	
AAR has a presence at local association and firm events to promote AAR's educational programs and resources	
AAR works through appropriate committees to influence ADRE to permit C/E Credit for business-skill related topics (5.A2)	
Platform is available for members to write reviews for classes and instructors.	
A marketing campaign is developed and implemented to begin to build a culture that emphasizes the benefits and value of lifelong learning and connect the value of education to business success. (A3)	

**ARIZONA ASSOCIATION OF REALTORS®  
2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

**Broker University**

This program involves:

- *Annual Broker Seminar*
- *Broker Management Clinic classes*
- *CRB courses*
- *MyBrokerCoach blended online program for new brokers*
- *Welcome new DR resource*
- *Development and Marketing resources*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

This plan provides for the development and/or delivery of education programs/resources designed specifically for brokers and managers on how to efficiently and effectively run a brokerage firm (A-5), stay information of emerging trends and regulations and create a sense of being a trusted course of educational resources and opportunities for their agents.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

Continue basically as-is

Continue with the following modifications:

Increase number of BMC offerings to 1 per quarter; subsidize instructor fee to enable low registration fee); create a broker webpage housing links to broker-related content in AAR website (table of content concept), appoint task force to discuss feasibility of creating self-evaluation tools for brokers; begin to develop digital business toolboxes

\_\_\_ Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	<b>Status</b>
Programs and services are developed and/or offered to brokers/owners which focus on operating a successful brokerage and/or managing risk.	
Partnership opportunities are continually explored and evaluated that bring quality programs to our brokers when partnering is more advantageous than developing.	
Promotional materials are produced and distributed keeping brokers informed of AAR's programs, products and resources and their benefit	
Feedback (content and instructor) is evaluated after each program/class	
Brokers have access to broker-specific information, including a welcome new broker kit	
Research the feasibility of developing a self-evaluation tool for brokers (A-6)	
Demographics of Arizona brokers is evaluated and used to determine needs assessments for education content	

**ARIZONA ASSOCIATION OF REALTORS®  
2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

***rCRMS (Certified Risk Management Specialist)***

This program involves:

- rCRMS Program development, administration, delivery and marketing

**Brief description of how the PPSA contributes to achieving AAR’s vision:**

This plan provides for an education certification program that is designed to enhance member’s knowledge to manage and minimize member’s liability. The rCRMS program is the only state-specific risk management program available to AAR members.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Measurable objectives:**

Measurable objectives	Status
A program (rCRMS) that focuses on state specific issues and is offered and available to members throughout the state	
A cadre of qualified instructors is available to deliver the rCRMS courses is maintained and monitored.	

Promotional materials are produced and distributed with messages that focus on the value of the rCRMS program through key value & benefit messages	
Multiple channels are utilized to create member awareness of program and courses utilizing email, social media, videos and print collateral	
Newly certified members are recognized through appropriate AAR vehicles.	
Options to create online versions of the rCRMS program are explored and developed, if feasible	

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

**Education Outreach**

This program involves:

1. Delivery NAR designation/certification classes through local association partnership and remote delivery (development, administration, marketing, license fees)
2. Delivery of 3 hour c/e courses at low cost to local association partnerships
3. Reference and resources supporting education endeavors
4. Annual Arizona Education Director Workshop
5. Annual Trends Summit

**Brief description of how the PPSA contributes to achieving AAR's vision (REAL Solutions):**

This program involves delivering education to members that focus on member competencies led by instructors who are practitioners in the topics they teach and that have exceptional instructional delivery skills (5.A.1) through the use of live classroom and remote delivery methods and providing partnership opportunities (5.E) to local associations, brokerages and allied industries and assistance to local association education staff/volunteers.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications:



Offer two 3-hour c/e courses per month via remote delivery and subsidize instructor fees to enable low cost registration;

\_\_\_ Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	<b>Status</b>
AAR delivers high-level, skill-based programs and workshops led by instructors who are practitioners in the topics they teach and meet established criteria.	
Partnership opportunities with local associations, the brokerage communities and allied industries are available	
A live remote broadcast system is utilized to deliver certification/designation and c/e classes to members in partnership with local associations	
Low cost quality education is available to members (A-8)	
A forum for local education staff and ADRE (updates and Q&A on school process, policies, guidelines) is provided.	
Methods are employed to create awareness of educational opportunities-that include, web calendar, email, social media, videos and print collateral	
Technology tools are utilized to deliver nuggets of information to members	
Resources are available to local education staff and volunteers charged with overseeing or developing their education endeavors.	
Student feedback for content and instructor performance is monitored after every class.	
A conference featuring local and national speakers addressing where the real estate industry is now and where it is headed is available to members.	
Identify course curriculum that should be enhanced by incorporating (or increasing) workshop-style activities into the content. (A-7)	

**ARIZONA ASSOCIATION OF REALTORS®  
2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

***Education Development***

This program involves:

- *Resources, reference material Software and licenses for course development*
- *Consultant fees for online course development*
- *Development of Course-in-a-Box*
- *Staff training and conference - education*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

This plan provides for the development of education programs that focus on member competencies and address current issues and trends that position the REALTOR member to succeed (5.A). This plan also sets the foundation that raises the bar in the effectiveness of online education in both content and delivery through development and/or partner with online course providers. (5.D)

for online classes that utilize technology that

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

Continue basically as-is

Continue with the following modifications:

**Increase curriculum development allocation to assist in developing new courses; create courses-in-a box paired with instructor training for each course (similar to the CFPB course format in 2015)**

Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	<b>Status</b>
An effective and efficient learning management system is utilized to develop and host AAR's online education.	
Online educational classes utilizing technology(ies) that raise the bar in the effectiveness of online education in both content and delivery are offered and/or available to members	
A series of Course-in-a-Box are developed that can be used by Arizona instructors who meet criteria and training	
Resources and training are available to ensure best practices are utilized in curriculum development	
A library of AAR c/e courses is developed and maintained that address the needs of members.	
Development of digital subject-related tool-boxes (A-4)	
Members are aware of resources and tools to assist them in assessing their own skills and knowledge	

**ARIZONA ASSOCIATION OF REALTORS®  
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**Program, Product, Service or Activity (PPSA):**

**Instructor Development**

This program involves:

- *Instructor Development Workshop*
- *Training opportunity for new AAR instructors*
- *Quarterly webinars for instructors (subject matter updates)*
- *Resources (training/subscriptions) to share, incorporate and monitor presentation trends*

**Brief description of how the PPSA contributes to achieving AAR's vision:**

This plan provides resources and tools to develop instructors with exceptional skills (5.A.3) which is a critical component in raising the standard in real estate education.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

Continue basically as-is

Continue with the following modifications:

**Focus IDWs on ADRE's required presentation skills, develop quarterly subject update webinars to keep instructors abreast of important industry issues.**

Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	<b>Status</b>
Instructors and education volunteers are aware of AAR criteria and encouraged to support and adopt the criteria within their education efforts.	
Opportunities are available or provided to assist instructors in honing their skills	
Resources and guidance provides to new instructors coming into AAR cadre	
Research the feasibility of recognizing instructors who excel	
Emerging trends in instructor skills and tools are monitored, shared and incorporated in the delivery of AAR's programs.	

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**Program, Product, Service or Activity (PPSA):**

***Industry Partners Conference***

This program involves:

- Partnership role in planning, presenting and administering the annual Partners Conference

**Brief description of how the PPSA contributes to achieving AAR’s vision (REAL Solutions):**

This plan affords AAR an opportunity to partner with the Arizona Mortgage Bankers Association and Arizona State Escrow Association to offer a one day program bringing REALTORS, lenders and escrow reps together to learn from each other.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Measurable objectives:**

Measurable objectives	Status
An educational program, through partnership program with AMLA and ASEA,	

is offered to help members understand each others role in the real estate transaction.	
The Industry Partners Conference is evaluated annually to ensure it meets the needs of our members.	

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**Program, Product, Service or Activity (PPSA):**

***Leadership Training & Development***

This program involves:

- Annual Leadership Conference
- LTA program

**Brief description of how the PPSA contributes to achieving AAR’s vision:**

This plan delivers a leadership training program to deliver new leaders (5.C) and a conference for on-going development of future local and state association leaders (5.C.1)

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3. AAR is the most powerful and influential political force in Arizona.
- 4. AAR provides members unsurpassed risk management tools.
- 5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

Continue basically as-is

Continue with the following modifications;

**Increase speaker fee allocation to cover two instructors for each of the 4 LTA modules; add in catering to cover LTA student breakfast or lunch at Spring Convention and Leadership Conference**

Discontinue

**Measurable objectives:**

Measurable objectives	Status
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An annual conference is offered to prepare incoming leadership to fulfill their roles, celebrate the accomplishments of outgoing AAR president, install incoming leadership and network with peers	
Feedback is solicited from incoming leadership to identify needs and evaluation of conference and training opportunities	
Members are aware of opportunities to serve in leadership and committees within AAR.	
Resources are compiled and available to assist or develop future leaders.	
AAR delivers a leadership training program for on-going development of future leadership.	

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**Program, Product, Service or Activity (PPSA):**

***MRES Society***

This program involves:

- Administration and marketing of MRES program
- Development of Career Path Guide
- Smart Start Video series

*The MRE Society is a membership society recognizing member's educational accomplishments/commitment and provides a tool to differentiate themselves from their peers as well as provide a career path for member's growth*

**Brief description of how the PPSA contributes to achieving AAR's vision (REAL Solutions):**

This plan provides a recognition and marketing vehicle for members to assist in positioning themselves as trusted, knowledgeable and skilled professionals.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

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2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

Continue basically as-is

Continue with the following modifications:

Add in instructor fee for high-level quarterly webinar for MRE Society members; appoint task force to discuss feasibility of some type of program that rewards members who embrace lifelong learning and shift their paradigm;

Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	<b>Status</b>
A program is available and used to recognize members lifelong learning commitment through their educational accomplishments	
Develop a “career path guide” incorporating REALTOR family education programs/resources to assist new members or members looking to take their career to the next level	
Multiple channels are utilized to create member awareness of the program utilizing email, social media, videos and print collateral	
MRE Society member feedback is solicited and reviewed annually.	
Re-energize the Smart Start video series to include topics from the Pathways to Professionalism and NAR Commitment to Excellence	
Study the feasibility of developing a rewards program recognizing members who embrace lifelong learning and shift their paradigm.	

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**Program, Product, Service or Activity (PPSA):**

***Property Management Certification***

This program involves:

- Development, administration, delivery and marketing of AAR’s newest certification program

**Brief description of how the PPSA contributes to achieving AAR’s vision:**

This plan provides for an education certification program that is designed to enhance member’s skills and knowledge in the property management field. The CRPM program is the only state-specific residential property management program available to AAR members.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

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3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Measurable objectives:**

Measurable objectives	Status
An education program is offered and available to members throughout the state through remote delivery and partnership.	
A cadre of qualified instructors to deliver the courses is maintained and monitored.	

Multiple channels are utilized to create member awareness of program and courses utilizing email, social media, videos and print collateral	
Newly certified members are recognized through appropriate AAR vehicles.	
Technology tools are utilized to deliver information to members	

**ARIZONA ASSOCIATION OF REALTORS®**  
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**Program, Product, Service or Activity (PPSA):**

***REALTOR Institute: GRI Designation***

This program involves:

- Administration
- Development and maintenance
- Marketing
- Scholarship program

**Brief description of how the PPSA contributes to achieving AAR's vision:**

This plan provides for a comprehensive training program for the member at large delivering specific how-to and best practices training in all aspects of residential real estate in the current marketplace. Additionally, this plan provides the administrative resources to ensure that the GRI Designation offers unsurpassed post licensing curriculum.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
3. AAR is the most powerful and influential political force in Arizona.
4. AAR provides members unsurpassed risk management tools.
5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

- Continue basically as-is
- Continue with the following modifications
- Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	<b>Status</b>
The GRI program is available to members throughout the state.	
Partnership opportunities are available to local associations and firms who wish to deliver the GRI courses to their members.	
Members are aware of the GRI program through marketing efforts that include email, social media, videos and printed collateral	
Dedicated website maintained and utilized	
The program is evaluated annually for effectiveness, structure and format to ensure it offers unsurpassed curriculum and meets the needs of our members and is responsive to the changing industry.	
Student feedback is favorable regarding quality and relevance	
A cadre of qualified instructors who meet the established GRI instructor criteria and AAR Instructor certification standards are maintained and monitored.	
Marketing collateral focuses on benefits to building a successful career and includes video and commercials	
Brokers are informed of the value of the program brings to their agents' business success	
Resources are available to provider-partners to help deliver and promote the courses.	
New designees are recognized and provided resources to help them promote their accomplishment.	
Proactive efforts are made to develop additional online courses to earn the GRI designation.	
A financial scholarship program is available to members and evaluated annually	
National trends in the GRI programs are monitored to keep AAR's GRI program growing and evolving.	
Student demographics are identified, compiled and continually evaluated	
Submit GRI program for NAR accreditation by December 2016	

**ARIZONA ASSOCIATION OF REALTORS®**  
**2016 BUSINESS PLAN**

**Program, Product, Service or Activity (PPSA):**

***Spring Conference***

This program involves planning, delivery and marketing of annual conference

**Brief description of how the PPSA contributes to achieving AAR's vision:**

This plan provides for a one and one-half day conference followed by Regional Caucuses and Board of Directors Meeting. Conference format varies from year to year, but generally consists of sessions featuring industry topics/updates.

**Importance of PPSA to the critical-to-serve customer:**

To succeed in this business, our members cannot continue to do the same things the same way. The conference meets this challenge by providing information in a "Kiplinger" format on legal/regulatory and business practice issues. This affords our member with an opportunity to meet peers from across the state. Referrals are a very big part of our industry: when referring a member/client to another REALTOR®, it is very important that the other REALTOR® is up-to-date on the industry issues, has integrity and has a personality match with the member/client being referred.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- 1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
- 2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 3. AAR is the most powerful and influential political force in Arizona.
- 4. AAR provides members unsurpassed risk management tools.
- 5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- 6. AAR supports the success of REALTOR® members with business services.

**Recommendations:**

Continue basically as-is (add allocation to cover cost of Spring Convention mobile app)

Continue with the following modifications:

Discontinue



**Measurable objectives:**

<b>Measurable objectives</b>	<b>Status</b>
A statewide conference is offered that addresses the trends and challenges of the current market and provides information on best practices to help members learn how to adapt and succeed as well as networking opportunities and information exchange	
Cutting-edge and emerging technologies are incorporated into the program and marketing efforts where possible.	
Multiple channels are utilized to create member awareness of program and courses utilizing email, social media, videos and print collateral	
Positive feedback is received.	
Continually explore and evaluate areas/locations for future spring conventions	

## AAR Business Services & Technology 2015 Business Plan

**From:** Business Services and Technology  
**Chair:** Fred Cleman  
**Staff Liaison:** Nick Catanesi  
**Date:** 2015

**REALTOR® - The best prepared real estate professional with the highest standards.**

**The following are programs, products, services and activities (PPSA's) with Business Services and Technology oversight.**

### **BUSINESS SERVICES**

AAR provides technology tools other than forms delivery as a member benefit only if AAR is in a unique position to provide the tool, or the tool create value statewide, or if the tool advances the real estate industry and the AAR vision.

**Brief description of how the PPSA contributes to achieving AAR's vision:** AAR's Business Services provide tangible products members use every day in increasing their professionalism and providing a higher quality of service to consumers.

**Importance of PPSA to the critical-to-serve customer:** Business Services enhances member's professionalism and prepares them to better serve tomorrow's consumers.

**Strategic Focus Points:**

	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
	3. AAR is the most powerful and influential political force in Arizona.
	4. AAR provides members with unsurpassed risk management tools.
	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Ensures that training materials for eSign and zipForm Plus are always accurate and current.	
Conduct a user survey of AAR members on their use of Business Services applications by November 30, 2016.	
Investigate and provide information on products and services that increase efficiency and profitability of member business operations.	
Negotiate discounts for products and services that benefit members.	
Maintain form security with forms licensees.	

**Recommendation:** Continue basically as-is

**zipForm®**

AAR negotiates discounts for products and services that benefit members.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** zipForm® controls the delivery of AAR’s forms and provides the delivery of AAR’s forms to the members as a member benefit.

**Importance of PPSA to the critical-to-serve customer:** zipForm® controls risk and enhances member’s professionalism, preparing them to better serve tomorrow’s consumers.

**Strategic Focus Points:**

	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
	3. AAR is the most powerful and influential political force in Arizona.
X	4. AAR provides members with unsurpassed risk management tools.
	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Number of users	
Conduct trainings	
Positive member response	

**Recommendation:** Continue basically as-is

**Tech Support Helpline**

AAR negotiates discounts for products and services that benefit members.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Provides members with a source to minimize computer and device issues with a trusted REALTOR friendly resource.

**Importance of PPSA to the critical-to-serve customer:** Provides members with an inexpensive resource for computer and device technical assistance as a benefit.

**Strategic Focus Points:**

	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.

	3. AAR is the most powerful and influential political force in Arizona.
X	4. AAR provides members with unsurpassed risk management tools.
X	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Number of users	
Market for member awareness	
Positive member response	

**Recommendation:** Contract with approved provider

### **AAR eSign**

AAR negotiates discounts for products and services that benefit members.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** AAR eSign provides members with a technology tool through AAR’s unique position to provide the tool. AAR eSign creates value statewide and advances the real estate industry.

**Importance of PPSA to the critical-to-serve customer:** zipForm® controls risk and enhances member’s professionalism, preparing them to better serve tomorrow’s consumers.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
	3. AAR is the most powerful and influential political force in Arizona.
X	4. AAR provides members with unsurpassed risk management tools.
	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Number of users	
Conduct trainings	
Positive member response	

**Recommendation:** Continue basically as-is

## SOFTWARE DEVELOPMENT

AAR will develop and monitor software that will help members’ access to AAR’s forms as a member benefit and maintain data to better understand member needs, communicate more effectively with members and maximize adoption of AAR programs and services.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** AAR’s Business Services provide tangible products members use every day in increasing their professionalism and providing a higher quality of service to consumers.

**Importance of PPSA to the critical-to-serve customer:** Applications provided by AAR allow members to work effectively and efficiently.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
	3. AAR is the most powerful and influential political force in Arizona.
X	4. AAR provides members with unsurpassed risk management tools.
	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Develop Forms Server for licensee and member use by January 2016	
Enhance data warehouse capabilities for “Enhanced Member Profile” initiative by June 2016	
Develop data warehouse for “Enhanced Member Profile” integrations of website usage by July 2016	

**Recommendation:** Continue with modifications detailed below.

### Enhanced Member Profile

AAR develops and maintains data, beginning with an enhanced member profile, to better understand member needs, communicate more effectively with members and maximize adoption of AAR programs and services.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** The Enhanced Member Profile provides the tools to communicate the right message to the right people in methods that reach out, inform and engage the membership.

**Importance of PPSA to the critical-to-serve customer:** The Enhanced Member Profile is a necessary tool to provide information on members to effectively communicate and coordinate information.

Measurable Objectives	Status
Provide data analysis of AAROnline.com members logged-in.	

Develop “Enhanced Member Profile” integrations of Rapattoni and RegOnline by July 2015	
Invest	
Build	

**Recommendation:** Continue with proposed initiative

### IT RESOURCES AND SECURITY MANAGEMENT

AAR will develop and monitor software that will help members’ access to AAR’s forms as a member benefit (SP: 5.A) and maintain data to better understand member needs, communicate more effectively with members and maximize adoption of AAR programs and services (SP: 5.E).

**Brief description of how the PPSA contributes to achieving AAR’s vision:** This program contains basic support items for the network and communications infrastructure of the association.

**Importance of PPSA to the critical-to-serve customer:** This is an “enabling” program that provides for development and delivery of essential customer benefits.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

X	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
X	3. AAR is the most powerful and influential political force in Arizona.
X	4. AAR provides members with unsurpassed risk management tools.
X	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Data and voice systems uptime is better than 99%, excluding planned maintenance periods	
Security exploits conducted against AAR receive urgent attention and appropriate measure taken to prevent reoccurrence	
Build an effective disaster recovery infrastructure to allow immediate phone and email recovery by the end of August 2015	

**Recommendation:** Continue with modifications detailed below.

### Phone

AAR’s Information Technology resources will ensure that phone communications are secure and reliable, allowing AAR to communicate more effectively with members (SP: 5.E).

**Brief description of how the PPSA contributes to achieving AAR’s vision:** The phone system is an integral part necessary to communicate with members. The system is essential to each area of AAR, providing a direct link to/from members, ensuring AAR’s ability to fulfilling its vision.

**Importance of PPSA to the critical-to-serve customer:** The phone system is a necessary tool to provide members with a channel to effectively communicate and coordinate information.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

X	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people in methods that reach out, inform and engage the membership.
X	3. AAR is the most powerful and influential political force in Arizona.
X	4. AAR provides members with unsurpassed risk management tools.
X	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Enhance disaster recovery infrastructure to maintain phone system in event of local physical failure	
Maintain	
Troubleshoot	

**Recommendation:** Continue with the following modifications; 1) enhance phone servers at secure colocation with backup power and near-instantaneous network failovers, 2) add equipment to allow call distribution to mobile network, and 3) increase network speed between off-site location and local servers.

**Network**

AAR’s Information Technology resources will ensure that the network infrastructure is secure and reliable, allowing AAR to communicate more effectively with members and each other (SP: 5.E).

**Brief description of how the PPSA contributes to achieving AAR’s vision:** Provide resources which support the entire network and infrastructure of the association. A major part of this is securing AAR’s networks against unauthorized access, physical damage/failure and providing for restoring the infrastructure in the event of a major disaster. Components of this program include AAR’s Internet connections, data backup and restoration, maintenance of Internet firewalls and switches, support for our membership system, and consulting fees for technology and security issues.

**Importance of PPSA to the critical-to-serve customer:** This program provides resources that enable nearly all programs within AAR.

Measurable Objectives	Status
Establish disaster recovery infrastructure to maintain phone system in event of local physical failure	
Maintenance	
Vulnerability studies and remediation	

**Recommendation:** Continue with the following modifications; 1) establish data backup redundancy at colocation with backup power and network failovers, 2) add equipment to replace aged core infrastructure equipment, and 3) increase network “backbone” speed to server efficiency.



## **BUSINESS SERVICES AND TECHNOLOGY SUPPORT**

AAR’s Business Services and Technology area will provide top notch technical and customer support to its members.

**Brief description of how the PPSA contributes to achieving AAR’s vision:** This program contains basic support items for other programs within this committee, as well as programs in other areas. Included are things such as copying, postage, subscriptions and supplies. It supports the vision indirectly by providing resources critical to accomplishing the goals of other programs, products, services, and activities. Specialized training/continuing education of staff and travel of staff to meetings and conferences are included in this budget.

**Importance of PPSA to the critical-to-serve customer:** This is an “enabling” program that provides for development and delivery of essential customer benefits.

**Strategic Focus Points:** Indicate which focus point is addressed by the PPSA.

- X        1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision and communicates the right message to the right people in methods that reach out, inform and engage the membership.
- 2. AAR is the most powerful and influential political force in Arizona.
- 3. AAR provides members with unsurpassed risk management tools.
- 4. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
- X        5. AAR supports the success of REALTOR® members with business services.

<b>Measurable Objectives</b>	<b>Status</b>
Staff and committee leadership review use of resources via monthly financials	
At year-end, income and expense for this committee’s overall budget are within 10%	

**Recommendation:** Continue basically as-is.