



## **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: \_\_\_\_\_