ARIZONA
association of
REALTORS®

2018 Strategic Plan

For Executive Committee Approval

Introduction:
The strategic objectives in the Arizona Association of REALTORS® (AAR) Strategic Plan are the parameters in 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 13-14, 2017 in Sedona. The participants included AAR officers, directors, committee chairs/vice chairs, local association leaders and key AAR personnel. The 2017 Strategic Plan created a solid foundation for the 2018 Strategic Plan so that the participants concentrated on action items for 2018.

AAR President-Elect Lori Doerfler and AAR CEO Michelle Lind facilitated the planning process. Within our vision and purpose we will intentionally manage or create an experience for our members and staff.

Global Discussion: The participants discussed at length whether AAR has a role in global real estate that falls within AAR's purpose, and if so, identifying AAR's global Strategic Objective. The participants did not reach a consensus. Therefore, AAR staff and Leadership will conduct additional research and investigate the merits of a future global Strategic Objective in AAR's Strategic Plan.

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.

Actions:

1. Continue to proactively research and review options for AAR efficiency improvement.
2. Develop a staff succession plan.

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

Actions:

1. Influence members to utilize REALTOR® brands (products and services).
2. Promote the value and the "why" of the REALTOR® brand to our members and consumers.
3. Promote REALTORS® as professionals.

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

Actions:

1. Assist and certify local associations in core standards compliance.
2. Partner with local associations to provide new REALTOR® orientation resources to Include AAR.
3. Be a resource and provide tools for local associations to communicate their relevance to members.
4. 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.

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. Encourage communication and collaboration with associations and MLSs regarding the member experience.
2. Maintain a collaborative working relationship with ADRE.
3. Investigate and compile MLS regional consolidation resources for Local Associations.

AREA 2: LEGISLATIVE & POLITICAL AFFAIRS OVERSIGHT - ADVOCACY

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

Strategic Objective 2.A: AAR proactively advocates and protects private property rights and real property ownership.

Actions:

1. Articulate NAR's and/or AAR's legislative/political successes to members with emphasis on how it affects their day-to-day business.
2. Continue to follow the Legislative Policy Statements.
3. Proactively advance or defeat legislation to benefit private property rights and REALTORS®
4. Maintain and promote a mechanism by which members can relay, on a year round basis, legislative comments and proposals.

Strategic Objective 2.B: AAR advocates and capitalizes on the REALTOR® Party.

Actions:

1. Provide resources to members to help them understand the value of RAPAC.
2. Educate and encourage members to share the value of RAPAC.
3. Utilize the NAR stipend to promote the available REALTOR® NAR programs.

Strategic Objective 2.B.1: AAR leverages and maintains influential relationships.

Strategic Objective 2.B.2: AAR serves as a resource for local associations to take advantage of REALTOR® Party opportunities.

Strategic Objective 2.C: AAR strives to achieve NAR RPAC fundraising goals and Calls for Action participation rates.

Actions

1. Continue to provide assistance, examples, fundraising ideas and messaging to achieve and sustain 100% of our RAPAC goals.
2. Articulate RAPAC successes to members with emphasis on how it affects their day-to-day business.
3. Establish an emphasis on previous RAPAC investors with a focus on retention and continued investment.

AREA 3: RISK MANAGEMENT

PURPOSE: AAR provides members with unsurpassed risk management tools.

Strategic Objective 3.A: AAR's forms establish the standard of care in the industry.

Strategic Objective 3.A.1: AAR maintains the most up-to-date forms, develops new forms as circumstances warrant, and protects forms' copyrights.

Strategic Objective 3.B: AAR monitors claims statistics to identify liability trends.

Strategic Objective 3.C: AAR maintains comprehensive and accessible legal information for member use.

Actions:

1. As of 2018, monitor marijuana legal conflicts, solar, marketing service agreements and comfort animals; and keep members informed as these issues evolve.
2. Increase promotion and education of federal regulatory changes and enforcement; respond to changes and monitor
3. Monitor cyber-fraud and cyber-security issues and keep members informed of the risks, as well as policies and procedures members can implement to mitigate those risks.

Strategic Objective 3.D: AAR provides programs for early and effective dispute resolution.

Strategic Objective 3.E: AAR is proactive in promoting laws (legislative and case law), regulations, and standards of practice that reduce member liability.

Strategic Objective 3.F: AAR proactively provides timely and relevant risk management information, education and tools via both "bite-size" and "in-depth" content across varied communication platforms.

Actions:

1. Promote and update the educational tool kit for teams and brokers on best practices and guidelines for management of teams.
2. 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.).
3. Direct agents to their brokers.
4. Direct members to AARonline.com for relevant risk management resources.

Strategic Objective 3.F.1: AAR collaborates with local associations, regional vice presidents and multiple listing services to identify risk management needs for members, associations and regions.

Strategic Objective 3.F.2: AAR acts as a conduit between associations on the national, state and local levels.

Strategic Objective 3.G: AAR maintains an effective Legal Hotline and publishes meaningful legal information for the benefit of its members.

Actions:

1. Share with agents the dangers posed by social media.
2. Educate agents on potential ethical and legal liabilities associated with off-market Listings.

Strategic Objective 3.H: AAR provides unsurpassed Professional Standards enforcement and ongoing Professional Standards training programs for hearing panel members, grievance committee members, mediators and ombudsmen while reinforcing, on a continuing basis, AAR Professional Standards benefits and results.

AREA 4: PROFESSIONAL & BUSINESS DEVELOPMENT

PURPOSE: AAR sets the standard in quality and meaningful professional development that positions the REALTOR® member to succeed, and delivered to members in their moment of need.

Strategic Objective 4A: To be the most trusted source and delivery partner of professional development and information resources for REALTOR® members and local REALTOR® associations.

Actions:

1. Cultivate an environment that emphasizes the benefits and value of lifelong learning.
2. Provide low cost or no cost subsidized educational programs as needed,
3. Integrate national speakers into AAR's conferences and conventions to provide a broad scope in national business practices, trends and techniques.

Strategic Objective 4.A.2: AAR works through appropriate channels to influence ADRE to permit c/e credit for business-skill related topics.

Strategic Objective 4.B: AAR provides comprehensive, reliable, and accessible information professional development to REALTOR® members.

Actions:

1. Provide resources to brokers that address the needs of the diverse brokerage community.
2. Design educational programs that focus on building member success.
3. Develop and convert existing curriculum to learner centered format.
4. Provide materials to instructors to promote professionalism at every education opportunity
5. Evaluate how an immersive learning experience can be incorporated into AAR's programs.

Strategic Objective 4.C: AAR develops new volunteer leaders.

Action: Create educational events, classes and opportunities to enhance leadership skills.

Strategic Objective 4.C.1: AAR delivers a leadership training program for on-going development of future local and state association leaders.

Strategic Objective 4.D: AAR employs technologies and resources to create a state of the art learning environment available to members.

Strategic Objective 4.E: AAR provides partnership opportunities with local associations, the brokerage communities and allied industries to deliver education programs and resources.

Strategic Objective 4.F: AAR attracts, retains and develops instructors who have exceptional skills and embrace modern teaching techniques.

AREA 5: BUSINESS SERVICES & TECHNOLOGY

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

Strategic Objective 5.A: AAR controls and provides the delivery of AAR's forms to the members as a member benefit.

Strategic Objective 5.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.

Action: Pursue partnership and collaboration opportunities to teach members how to use business technologies.

Strategic Objective 5.C: AAR investigates and provides information on member or staff recommended products and services that increase efficiency**,** profitability and digital security of member business operations.

Action: Research and inform members on how to choose the right technologies for business through multiple channels of communication.

Strategic Objective 5.D: AAR negotiates discounts for products and services that benefit members and consistently market those offerings.

Strategic Objective 5.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.

Strategic Objective 5.F: AAR explores, identifies and recruits members who are technologically adept to enhance the goals of the committee.

Action: Create a mechanism for consistent member generated content regarding technology related issues and practices.

AREA 6: COMMUNICATIONS AND CONSUMER OUTREACH

PURPOSE: AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Strategic Objective 6.A: AAR disseminates pertinent, relevant and timely industry information.

Strategic Objective 6.B: AAR engages in regular outreach to members and local associations to offer shared communication services and identify unique needs.

Strategic Objective 6.C: 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.

Action

1. Organize information on the website for easy search and access by members.

Strategic Objective 6.C.1: AAR investigates the feasibility of a system that allows members to choose preferred communication methods, topics and frequency of push communications.

Action

1. Implement a system to find out the preferred communications methods of our members and communicate with our members via segmented content.

Strategic Objective 6.D: AAR will engage in not less than four consumer outreach activities.

Strategic Objective 6.D.1: AAR will be the "Voice for Real Estate" in Arizona.

Strategic Objective 6.D.2: AAR will invest in and promote community involvement activities.

Strategic Objective 6.D.3: AAR will consistently communicate advocacy efforts.

Action: Provide a consistent voice at AAR which will speak to advocacy efforts with a focus on consumer outreach and education to the public and members.

Strategic Objective 6.E: AAR promotes the value of using REALTORS®.

Action: Communicate the value and successes of the REALTOR® association throughout the state.

Strategic Objective 6.F: AAR solicits community outreach efforts conducted by REALTOR® members and recognizes them through an annual award.

Strategic Objective 6.G: AAR develops a system to listen (via social channels) for the purpose of delivering timely and relevant content for member associations to foster discussion.

Strategic Objective 6.H: AAR increases diversity among its members by developing a communication campaign that promotes real estate as an inclusive profession.

Action: AAR promotes real estate as a first-time profession to high schools, junior colleges and colleges.

Note: The above Objectives 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 on: _____
Date

_____ _____
President's signature Date

_____ _____
President-Elect's signature Date

_____ _____
CEO's signature Date

AAR OPERATIONS AND STRATEGIC INITIATIVES
2018 Business Plan

FROM: **Operations & Strategic Initiatives**
Chair: Jan Leighton, Treasurer
Staff Liaison: K. Michelle Lind, Esq., CEO
DATE: **2018**

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

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

CURRENT TOP PRIORITIES

RECOMMENDATIONS

GROUPS FORMED

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.
__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.
__X__ 2. AAR is the most powerful and influential political force in Arizona.
__X__ 3. AAR provides members unsurpassed risk management tools.
__X__ 4. AAR sets the standard in quality and meaningful professional development that positions the REALTOR® member to succeed, and delivered to members in their moment of need.
__X__ 5. AAR supports the success of REALTOR® members with business services.
__X__ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objectives	Status
Determine real estate firm representatives for 2019 BOD based on 12/31/17 membership numbers.	
Establish recommendations for allocation of surplus from 2017 operating budget for BOD approval.	
Begin 2019 officer election process. Announce deadline and application submission dates. Submit 2019 candidate statements for BOD vote.	
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.	• ___ % - March meeting • ___ % - October meeting

Recommendation:
_X_ Continue basically as-is
___ Continue with the following modifications
___ 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.

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Measurable Objectives	Status
Assist leadership engagement 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 2019 to be approved by ExCom and BOD at Spring meetings.	
Assist President-elect in identifying members, scheduling and organizing planning session for 2019. Coordinate Planning Session outcomes, distribute Strategic Plan to attendees for comment. Distribute Strategic final plan for implementation in business plans and budget.	
Update AAR officer position description and activity checklists. Distribute job descriptions and budgeted expense and reimbursement expectations to line officers and executive committee members.	
Operate in compliance with bylaws, policies and applicable laws.	
Communicate upcoming meeting times and agendas effectively.	

Evaluate and/or approve funds and agreements for innovative programs, products and/or services as submitted.	
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.	• ___% - January meeting • ___% - March meeting. • ___% - June meeting • ___% - 2019 Budget meeting • ___% - October meeting

Recommendation:
_X_ 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.
_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.
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_X_ 4. AAR sets the standard in quality and meaningful professional development that positions the REALTOR® member to succeed, and delivered to members in their moment of need.
___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objectives	Status
Complete the NAR Mandatory Core Standards Compliance Form for AAR and submit as required by NAR.	
Assist and certify local associations in NAR mandatory core standards compliance.	
Plan and conduct 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 2019 director entitlements for local associations using 12/31/17 membership report.	
Determine which Arizona AEs are eligible to serve on 2019 BOD.	
Partner with local association to provide new REALTOR® orientation resources to include AAR.	

Provide tools and be a resource to local associations to help communicate their relevance to members and encourage communication and collaboration between associations and MLSs regarding the member experience.	
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.	
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. (CCIM/IREM, VAREP)	
Investigate and compile MLS regional consolidation resources for Local Associations.	
Influence member to utilize REALTOR® brands (products and services).	

Recommendation:
_X_ 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.
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___ 4. AAR sets the standard in quality and meaningful professional development that positions the REALTOR® member to succeed, and delivered to members in their moment of need.
___ 5. AAR supports the success of REALTOR® members with business services.
_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objectives	Status
Respond to media requests for interviews and information.	
Promote the value proposition of using a REALTOR® and/or engaging in community activities which enhance the image of REALTORS®.	

Promote the value and the "why" of the REALTOR® brand to our members and consumers.	
Promote REALTORS® as professionals.	
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.	
Establish AAR as a source of credible information about Arizona real estate issues.	

Recommendation:
_X_ 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.
_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.
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____ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

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

Recommendation:
_X_ 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.

_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.
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____ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objectives	Status
Remain active in all NAR Region 11 activities (Caucus, Nominating Committee, and Strategic Planning Committee).	
Assist in coordinating and attend Region 11 Conference.	
Assist Arizona's 2019 RVP	

Recommendation:

_X_ 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.

_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.
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____ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objectives	Status
Collect dues from local associations and Members at Large. Conduct monthly dues/membership reconciliations.	
Evaluate annual budget to ensure that dues are properly allocated to AAR's policies, programs and services.	

Prepare, analyze and distribute monthly financials to the Executive Committee for review and to ensure the association's financial goals are being met.	
Continue to proactively research and review options for AAR efficiency.	
Prepare suggested budget adjustments, if necessary, for ExCom consideration.	
Monitor: • capital reserve fund account balances • operating and strategic initiative reserve accounts • RAPAC and Issues Mobilization accounts and ensure that adherence to bylaws and investment policy.	
Reconcile all AAR checking accounts monthly (AAR, ARDAF, ARFHCO, PSF, RAPAC, Issues Mob, etc).	
Establish recommendations for allocation of surplus from previous year's operating budget for ExCom approval.	
Assist with the annual audits (AAR, ARDAF, ARFHCO, RAPAC).	
Prepare and finalize 2019 Operating and Capital budget with the 2019 Executive Committee and Board of Directors.	

Recommendation:
_**X**_ 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.
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____ 5. AAR supports the success of REALTOR® members with business services.
____ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objectives	Status
Address on-going building maintenance needs and report any critical issues to ExCom.	
Assist property manager in working with tenants to maintain lease agreements.	

Conduct thorough review of Arizona REALTORS® building infrastructure and make recommendations for needed improvement in the 2019 Capital Budget.	

Recommendation:
_X_ 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.
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Measurable Objectives	Status
Analyze personnel/overhead needs based on the Association's business plans.	
Retain a well-trained, capable staff.	
Maintain positive staff response to member needs.	
Develop a staff succession plan.	

Recommendation:
_X_ 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.	**Pending**
Provide in-kind staff time to effectively manage 501(C)(3) per its bylaws.	On-going
Prepare and distribute local association funds and reports.	On-going

Recommendation:
_X_ 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.	**Pending**
Provide in-kind staff time to effectively manage 501(C)(3) per its bylaws.	On-going

Recommendation:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

AAR LEGISLATIVE AND POLITICAL AFFAIRS
2018 Business Plan

Committee: **Legislative and Political Affairs**
Chair: Kent Simpson
Staff Liaison: Nicole LaSlavic
DATE:

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

The following are programs, products, services and activities (PPSA's) with Legislative and Political Affairs oversight.

CURRENT TOP PRIORITIES

RECOMMENDATIONS

GROUPS FORMED

Federal Liaison Support

AAR proactively advocates and protects private property rights and real property ownership. AAR advocates and capitalizes on the REALTOR® Party. AAR leverages and maintains influential relationships.

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.
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_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objective	Target Date	Status
Communicate quarterly with 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	Quarterly	
Register all FPCs with NAR's REALTOR® Action Center	1/18	
Oversee the FPCs quality contact with their representative or their staff within D.C. or Arizona, ensuring attendance at required meetings, training sessions and fundraisers	Quarterly	

Ensure FPCs attend required Mid-Year meetings	5/18	
Ensure compliance that all FPCs attend required NAR training session on their roles and responsibilities	2/19	
Oversee that each FPC team will hold one meeting locally or attend a fundraiser with their congressman/senator or their staff during the year	12/18	
Maintain strong communication with Congressional staff through ongoing contacts on issues important to Arizona	12/18	
Attendance at meetings with Members of Congress during the NAR Mid-Year Hill Visits is by invitation only	5/18	
Ensure compliance that FPCs meet any NAR requirements	12/18	

Recommendations:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

Fundraising/Grassroots Support

AAR proactively advocates and protects private property rights and real property ownership. AAR articulates NAR's and/or AAR's legislative/political successes to members with emphasis on how it affects their day-to-day business. AAR advocates and capitalizes on the REALTOR® Party. AAR provides resources to members to help them understand the value of RAPAC and educates and encourages members to share the value of RAPAC. AAR leverages and maintains influential relationships. AAR serves as a resource for local associations to take advantage of REALTOR® Party opportunities. AAR strives to achieve NAR RPAC fundraising goals and Calls for Action participation rates.

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.
_X_ 2. AAR is the most powerful and influential political force in Arizona.
___ 3. AAR provides members unsurpassed risk management tools.
___ 4. AAR sets the standard in quality and meaningful professional development that positions the REALTOR® member to succeed, and delivered to members in their moment of need.
___ 5. AAR supports the success of REALTOR® members with business services.
_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objective	Target Date	Status
Finalize the political activities fundraising plan by December 31st by the previous plan year	12/18	
Identify members to participate in the annual REALTOR® Party training	6/18	

Provide fundraising tips, tools and promotional materials for local associations	9/18	
Distribute REALTOR® Party updates with local associations and the REALTOR® Party Director and provide Statewide RAPAC graphs	Monthly	
Visit, at a minimum of one time annually, with each local association to promote fundraising activities	10/18	
Utilize the NAR RAPAC Grant stipend for promotion of RAPAC	12/18	
Utilize the Major Investor Program NAR stipend to host an AAR Major Investor Event	12/18	
Achieve percent participation of local associations in Major Investor Events	12/18	
Achieve 100% level of RAPAC participation from state and NAR directors, AEs, Presidents, Presidents-elect, RVPs, RIMC, LPAC, Legislative Committee, RAPAC Trustees, EXCOM, BOD, and local RAPAC Chairs	12/18	**NAR Directors -** **AE's –** **2017 President's –** **RVP's –** **RIMC Committee –** **LPAC –** **Legislative Committee –** **RAPAC Committee –** **EXCOM –** **BOD's –**
Achieve 100% or NAR Major Investor Goal for 2018. Benchmarks: 50% of goal by April; 75% of goal by June; 100% by September 30.	12/18	**2018 Goal –**
Recognize Major Investors with gift	12/18	
Recognize President Circle members with gift	12/18	
Communicate state and federal election law requirements to local associations in order for RAPAC to remain in compliance at the state and federal level	12/18	
Host a fundraising event at the Spring Conference/Convention	4/18	
Host a fundraising event at the Leadership Conference	10/18	
Recognize RAPAC Major Investors on aaronline.com	12/18	
Recognize RAPAC Major Investors with special recognition at Capitol Day	1/18	
Recognize RAPAC Major Investors with special recognition at REALTOR® Caucus	9/18	
Maintain Leadership Appreciation Program to connect AAR leaders with	12/18	

Major Investors for recognition of investment		
Increase use of Placemaking and Smartgrowth grants by 50% over 2017 utilization by local associations	12/18	
Utilize REALTOR® Party Plus fundraising analytics and predictive models to identify likely and high dollar donors for use in achieving RAPAC goal	12/18	

Recommendations:
___ Continue basically as-is
_X_ Continue with the following modifications
___ Discontinue

- **Utilize REALTOR® Party Plus fundraising analytics and predictive models to identify likely and high dollar donors for use in achieving RAPAC goal.**

Governmental Communications

AAR articulates NAR's and/or AAR's legislative/political successes to members with emphasis on how it affects their day-to-day business. AAR maintains and promotes a mechanism by which members can relay, on a year round basis, legislative comments and proposals. AAR provides resources to members to help them understand the value of RAPAC. AAR educates and encourages members to share the value of RAPAC.

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.
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___ 5. AAR supports the success of REALTOR® members with business services.
_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objective	Target Date	Status
Provide REALTOR® Party updates and legislative updates to the Communications and Technology Department for use in the REALTOR® Voice, AAR blog and alternative forms of media distribution.	12/18	
Produce quarterly videos for membership outreach on Legislative and Political Affairs topics to include, but not limited to, the REALTOR® Party.	Quarterly	
Provide Calls to Action responses, when necessary, for targeted and effective immediate member communication with Arizona legislators and Members of Congress on critical issues	As Required	

Establish a system to enroll and automatically respond on members behalf to state and national Calls to Action	12/18	
Work with REALTOR® Party Plus to increase opt-in for text response Calls for Action	12/18	
Utilize digital advertising and technologies to push federal CFAs to members	12/18	
Maintain current information on each governmental program at aaronline.com	12/18	
Communicate with Big Yam for press releases when large successes occur or the consumer needs to be educated on the associations wins	12/18	
Communicate how Issues Mobilization and RAPAC reserves can enhance local association political objectives	12/18	
Communicate the importance of AAR's legislative/political successes to members	12/18	
Continue to communicate the mechanism by which members can relay, on a year round basis, legislative comments and proposals	12/18	
Utilize the broker involvement program/stipend to identify and train local brokers for grassroots education efforts on participation in NAR calls for action	12/18	
Work with REALTOR® Party Plus to identify a predictive model to target members for increased activism on legislative issues and advocacy initiatives	12/18	
Explore the use of geofencing, beacon and direct one-to-one digital advertising technologies for concentrated message delivery		

Recommendations:
___ Continue basically as-is
_X_ Continue with the following modifications
___ Discontinue

- **Combine REALTOR® Party updates and timely legislative updates to be provided to the Communications and Technology Department for use in the REALTOR® Voice, AAR blog and alternative forms of media distribution.**
- **Expand the production of quarterly videos for membership outreach on Legislative and Political Affairs topics to also include, but not limited to the REALTOR® Party.**

- **Work with REALTOR® Party Plus to increase opt-in for text response Calls for Action.**
- **Utilize digital advertising and technologies to push federal CFAs to members.**
- **Work with REALTOR® Party Plus to identify a predictive model to target members for increased activism on legislative issues and advocacy initiatives.**
- **Explore the use of geofencing, beacon and direct one-to-one digital advertising technologies for concentrated message delivery.**

Governmental Area Support

AAR is the most powerful and influential political force in Arizona. Continue to follow the Legislative Policy Statements. Proactively advance or defeat legislation to benefit private property rights and REALTORS®.

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.
_X_ 2. AAR is the most powerful and influential political force in Arizona.
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___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objective	Target Date	Status
Assign tasks to all governmental area work groups within approved budget parameters	12/18	
Implement a "Thank You" for each of the four government affairs committees.	12/18	

Recommendations:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

Legislative Advocacy

AAR is the most powerful and influential political force in Arizona. Continue to follow the Legislative Policy Statements. Proactively advance or defeat legislation to benefit private property rights and REALTORS®. AAR advocates and capitalizes on the REALTOR® Party. AAR leverages and maintains influential relationships.

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.
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___ 5. AAR supports the success of REALTOR® members with business services.
_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Objective	Target Date	Status
Activate broad-based AAR membership representation in lobbying activities through legislative committee appointments and related committee activities	12/18	
Encourage application to state boards and commissions	12/18	
Strengthen and maintain relationships with Arizona statewide officeholders and agency department heads	12/18	
Strengthen and maintain relationships with housing industry partners through ongoing communications	12/18	
Achieve an 85% success rate on AAR legislative policy priorities	6/18	
Conduct daily monitoring of legislation and recommend positions to the Legislative Committee in conjunction with the approved Legislative Policy Statements	6/18	
Monitor member involvement in political campaigns	12/18	
Finalize 2019 legislative priority list is finalized by October 2018	10/18	
Evaluate state-level candidates on AAR legislative policies and voting record to receive funds	8/18	

Recommendations:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

Legislative Policy Development

AAR is the most powerful and influential political force in Arizona. AAR proactively advocates and protects private property rights and real property ownership. AAR advocates and capitalizes on the REALTOR® Party. Maintain and promote a mechanism by which members can relay, on a year round basis, legislative comments and proposals.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.
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Measurable Objective	**Target Date**	**Status**
Poll members for their opinions through use of formal and informal methods	12/18	
Continue to involve stakeholders on real estate related issues	12/18	
Encourage proportional regional representation at the REALTOR® Caucus	9/18	
Forward all legislative recommendations to the Legislative and Political Affairs Committee for review and appropriate action	9/18	
Host 2018 REALTOR® Day Luncheon	1/18	
Identify for participation in or host a second legislator event	12/18	
Achieve attendance of 65% of legislators at legislative events	6/18	
Identify attendees for legislator events through political involvement and leadership activity	12/18	

Recommendations:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

Local Lobbying Support

AAR is the most powerful and influential political force in Arizona. AAR proactively advocates and protects private property rights and real property ownership.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.
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Measurable Objective	**Target Date**	**Status**
Assist local lobbying efforts as issues arise	12/18	

Encouraged local associations to establish an advocacy program and provide assistance as requested	12/18	

Recommendations:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

Political Research

AAR is the most powerful and influential political force in Arizona. AAR proactively advocates and protects private property rights and real property ownership. AAR continues to follow the Legislative Policy Statements.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.
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Measurable Objective	Target Date	Status
Conduct research as needed	12/18	
Work with REALTOR® Party Plus to utilize predictive models to obtain comprehensive analysis of membership as well as election data	12/18	

Recommendations:
___ Continue basically as-is
_X_ Continue with the following modifications
___ Discontinue

- **Work with REALTOR® Party Plus to utilize predictive models to obtain comprehensive analysis of membership as well as election data.**

Election Year Activities

AAR is the most powerful and influential political force in Arizona. AAR leverages and maintains influential relationships.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.
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Measurable Objective	**Target Date**	**Status**
Encourage members to register to vote	12/18	
Establish protocol for a "Get Out the Vote" campaign for use in 2018 election cycle	11/18	

Recommendations:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

AAR Risk Management Committee
2017 Business Plan

FROM: **Risk Management Committee (RMC)**
Chairman: **Beth Adams**
Vice Chairman: **Brad Ryan**
RMC Liaison: **Scott M. Drucker**
DATE: **January 1, 2018**

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)]
_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 is the most powerful and influential political force in Arizona.
_X_ 3. AAR provides members unsurpassed risk management tools.
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___ 5. AAR supports the success of REALTOR® members with business services.
_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

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:
_X_ 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
• Facilitate mediation requests on a timely basis	
• Receive positive feedback from mediation evaluations	
• Maintain list of qualified mediators	
• Update mediation policies and procedures as necessary	

Recommendations:
_X_ 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
• Facilitate ombudsman requests on a timely basis	
• Receive positive feedback from ombudsman evaluations	
• Maintain list of qualified ombudsmen	
• Update PS policy adaptations as necessary	

Recommendations:
_X_ 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:
_X_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:
_X_ 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)]
_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.
_X_ 2. AAR is the most powerful and influential political force in Arizona.
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_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

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	
• Promote and update the educational tool kit for teams and brokers on best practices and guidelines for management of teams	
• Promote and update a webpage that includes safety education, incident recordation and contemporaneous incident notification via a REALTOR® text alert system (ASAP)	

Recommendations:
_X_ 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	
• Hotline to maintain statistics on number and types of calls in cooperation with AAR staff	
• Hotline attorney to attend AAR Risk Management Committee or Workgroup meetings as requested	
• Hotline attorney to review new or revised AAR forms and notify AAR of any legal concerns or recommendations	
• Hotline attorney to consult with AAR General Counsel on legal issues as requested	
• Evaluate Hotline program by surveying members	
• Form Hotline Workgroup to evaluate program	

Recommendations:
_X_ 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
• Maintain claims statistics to identify liability trends	
• Foster alliances with defense attorneys and E&O carriers and mediators	
• As of 2018, monitor marijuana legal conflicts, solar, marketing service agreements, and comfort animals - Keep members informed as these issues evolve	
• Educate agents on potential ethical and legal liabilities associated with off-market listings	
• Share with agents the dangers posed by social media	
• Increase promotion and education of federal regulatory changes and enforcement; respond to changes and monitor	

• Monitor cyber-fraud and cyber-security issues and keep members informed of risks, as well as policies and procedures members can implement to mitigate those risks	
• Monitor the Americans with Disabilities Act website accessibility issues and keep members informed as the issue evolves	
• Collaborate with local associations, regional vice presidents and multiple listing services to identify risk management needs for members, associations and regions	

Recommendations:
_X_ 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
• Distribution of time sensitive legal and risk management information and articles	
• Deliver Arizona Broker/Manager Quarterly	
• Maintain advisories as necessary: Buyer Advisory, Short Sale Seller Advisory, Lease Owners Advisory, Tenant Advisory	
• Maintain and update legal, risk management, fair housing, and international real estate content on AAR's website and in publications, as necessary	
• 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.)	
• Direct agents to their brokers	
• Direct members to AARonline.com for relevant risk management resources	

Recommendations:
_X_ 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
• Participation in legal and legislative programs	

Recommendations:
_X_ 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
• Successful outcome in legislation supported and successful defeat of legislation opposed	

• Promote laws (legislative and case law), regulations, and standards of practice that reduce member liability	

Recommendations:
_X_ 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
• Negotiation of reasonable regulatory rules and policies that are acceptable to AAR members and do not hinder their success	
• Maintain contact with ADRE Advisory Board	

Recommendations:
_X_ 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)]
_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 is the most powerful and influential political force in Arizona.
_X_ 3. AAR provides members unsurpassed risk management tools.
___ 4. AAR sets the standard in quality and meaningful professional development that positions the REALTOR® member to succeed, and delivered to members in their moment of need.
___ 5. AAR supports the success of REALTOR® members with business services.
_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Goals:

Measurable objectives	Status
• 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	

Recommendations:
_X_ 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)]
_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 is the most powerful and influential political force in Arizona.
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___ 5. AAR supports the success of REALTOR® members with business services.
_X_ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Measurable Goals:

Measurable objectives	Status
• CEO, state leadership, committees, and local association executives are informed on legal issues and questions satisfactorily answered.	

Recommendations:
_X_ 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
• Successful outcome in litigation and dispute resolution.	

Recommendations:
_X_ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

ARIZONA ASSOCIATION OF REALTORS®
2018 BUSINESS PLAN

Program, Product, Service or Activity (PPSA):

Broker University
This program involves:

- *Broker Summit*
- *Broker Management Clinic classes*
- *Mack In A Minute video series*
- *Broker Brief webinars*
- *Branch Manager 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, stay informed of emerging trends and regulations, and create a sense that AAR is a trusted source of educational resources and opportunities for their agents.

2018 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.
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_X_ 3. AAR provides members unsurpassed risk management tools.
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___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.
.

Recommendations:
___ Continue basically as-is
_X__ Continue with the following modifications:
Refocus the format of the broker summit
___ Discontinue

Measurable objectives	
Design and deliver a broker summit that addresses the needs of the diverse brokerage community.	

Develop, partner and/or provide programs that focus on broker and operational Competencies.	
Communicate educational opportunities to brokers with messages that demonstrate the value of the programs to the broker and their agents.	
Student feedback is favorable regarding quality and relevance	
Redesign and deliver engaging and practical-based Broker Management Clinics	
Maintain, and update as needed, a Broker University webpage that compiles professional development resources:	
Provide opportunities for brokers/managers to stay abreast of issues, trends and AAR activities delivered through timely webinars and videos.	
Explore and engage in opportunities to provide professional development programs or resources to branch managers.	
Continue to produce and distribute the Mack In A Minute video series.	
Identify the needs of the diverse brokerages for use in developing professional development programs.	

ARIZONA ASSOCIATION OF REALTORS®
2018 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 on how 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 is the most powerful and influential political force in Arizona.
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___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Recommendations:
___ Continue basically as-is
__**X** Continue with the following modifications
Increase number of live-streamed classes; increase instructor fee rate; offer discounted registration fee for members who earned the rCRMS certification.
___ Discontinue

Measurable objectives	
Members will have access to rCRMS classes offered in partnership and live streamed at a competitive and affordable price	
Monitor and update curriculum as needed.	
Explore opportunities to incorporate or increase engagement activities into the curriculum.	
Maintain and monitor a cadre of qualified instructors	
Provide a easy to find master calendar and path earn the certification on rCRMS webpage	
Maintain a dedicated instructor page to house course materials.	
Offer rCRMS certification holders discounted class registration fees.	
Employ communication strategies to market upcoming courses and program value, including social media and video.	
Recognize newly certified members on CRMS webpage, AAR facebook page and announced to local associations.	

ARIZONA ASSOCIATION OF REALTORS®
2018 BUSINESS PLAN

Program, Product, Service or Activity (PPSA):

Education Outreach
This program involves:

1. Delivery, admin and resources for live and live-streamed REBAC classes
2. Live-streamed c/e classes
3. Annual Trends Summit
4. Development of micro-learning segments
5. New agent resource

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

This program provides partnership opportunities with local associations, the brokerage communities and allied industries to deliver education programs that provide comprehensive, reliable, and accessible professional development programs that focus on building member success.

This program also offers an annual Trends Summit to prepare members for changing trends and business practices 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 is the most powerful and influential political force in Arizona.
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___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.
.

Recommendations:
___ Continue basically as-is
_X__ Continue with the following modifications:
Increase instructor fee rate, eliminate live offerings of REBAC classes (will work will local associations on an as-needed basis), add in one live streaming offering the ABR, offer registration package in addition to single class fee, incorporate a no-show fee to the Trends Summit, engage in opportunities to provide resources to new agents.

___ Discontinue

Measurable objectives	
AAR will engage Instructors who have practitioner experience in the topic area and who adapt to leaner-centered teaching with preference given to instructors who assist in marketing effort requests.	
Provide partnership and revenue share opportunities to local associations, brokerages and NARPM who want to offer REBAC and AAR classes.	
Live Stream one day of c/e classes with local associations each month.	
Collaborate with instructors to identify how to incorporate (or increase) engagement/ activities into the curriculum they teach.	
Members will have access to education programs offered through AAR at a competitive and affordable price.	
AAR will provide local associations with an Education Chairman's manual and Live Streaming Administrative Guide.	
Deliver an Annual Trends Summit featuring national speakers for changing trends and business practices in the industry.	
Assist instructor who meet AAR's criteria, obtain approval to teach REBAC classes	
Grow the cadre of well-trained live streaming instructors.	
Engage in opportunities to provide new agent resources/training opportunities.	
Research education needs within the commercial membership segment and identify what AAR's role should be.	
Explore opportunities to take current content and convert into micro-learning training.	

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

Education Development
This program involves:

- *Resources, reference material and training expenses to stay abreast of education trends and technologies*
- *Course development/updates*
- *Contract Conversation videos*

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 grow and succeed. 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.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.
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___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Recommendations:
___ Continue basically as-is
_X__ Continue with the following modifications:
Incorporate production costs for 4 Contract Conversation videos, explore professionalism certification program.
___ Discontinue

Measurable objectives	
Maintain and update learning management platform license.	

Monitor and enhance live streaming platform to continually provide an effective learning experience and adhere to ADRE regulations.	
Explore gamification opportunities that can be incorporated into education programs.	
Staff has access to the necessary curriculum development and delivery resources to develop quality programs	
Explore development of a professionalism certification program or research/license available programs when that is more feasible..	
Produce a minimum of 4 Contract Conversation videos.	
Research and evaluate how an immersive learning experience can be incorporated into AAR's programs	
Explore possibility of developing or making available retirement workshops, videos or resources for members.	

ARIZONA ASSOCIATION OF REALTORS®
2018 BUSINESS PLAN

Program, Product, Service or Activity (PPSA):

Instructor Development
This program involves:

- *Instructor Development programs and opportunities*
- *Attendance at trainer conference*
- *Research and Resources (training/subscriptions) to share, incorporate and monitor presentation trends*
- *Video production*
- *Uniform Instructor Standards*

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

This plan provides resources, tools and growth opportunities to ensure AAR attracts, retains and develops instructors who have exceptional skills and embrace modern teaching techniques. Investing in instructor growth is a critical to AAR's efforts in providing quality education programs.

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 is the most powerful and influential political force in Arizona.
___ 3. AAR provides members unsurpassed risk management tools.
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___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Recommendations:
___ Continue basically as-is
_X_ Continue with the following modifications:
Increase instructor development resources, attendance at REEA convention
___ Discontinue

Measurable objectives	
Provide AAR instructors with opportunities to continually grow their skills and understanding of the needs of the modern learner.	
Provide resources and guidance to new instructors coming into AAR cadre.	
Provide training and resources to AAR's instructors who teach AAR's live streaming classes.	
Develop teaching tip/best practice video snippits for GRI classes.	
Monitor emerging trends in instructor skills which can aid instructors in enhancing their skills. (share distribute with PBD and Instructors)	
Develop and provide materials to instructors to promote professionalism at every education opportunity	
Utilize Instructor Standards to guide and strengthen instructor quality and performance.	
Provide one scholarship to the Bob Pike Train the Trainer for one new AAR instructor who could benefit from the program..	

ARIZONA ASSOCIATION OF REALTORS®
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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 Lenders 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.
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___ 3. AAR provides members unsurpassed risk management tools.
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___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Recommendations:
_X__ Continue basically as-is
___ Continue with the following modifications
___ Discontinue

Measurable objectives	
Participate as a partner with AMLA and ASEA, to offer a program designed to help members understand each other's role in the real estate transaction.	
Positive feedback is received to ensure it meets the needs of our members.	

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

Leadership Training & Development
This program involves:

- Annual Leadership Conference
- LTA program
- The Art of Leadership Webinar series
- Leadership Workshop

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

This plan provides leadership training programs to develop REALTOR and member leaders and a conference for on-going development leaders.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.
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___ 5. AAR supports the success of REALTOR® members with business services.
___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.

Recommendations:
___ Continue basically as-is
_X__ Continue with the following modifications;
Increase speaker fees and production costs for the conference, increase conference registration fee, increase speaker fee for stand-alone workshop (bring in national speaker) and add in speaker fee for The Art of Leadership webinar series.
___ Discontinue

Measurable objectives	
Offer an annual conference for incoming leadership and members who wish to become leaders.	

Program feedback received is favorable regarding quality and relevance.	
Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	
Develop and offer educational events, classes and opportunities to enhance leadership skills.	

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Program, Product, Service or Activity (PPSA):

MRES Society
This program involves:

- Administration and marketing of MRES program
- New agent training/resources
- Education program for MRES Society members
- Communication efforts emphasizing value of education/learning
- Video production
- Development of learning path resources

The MRES 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 as well as growth resources for new agents who strive to succeed.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.
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Recommendations:
_X__ Continue basically as-is
___ Continue with the following modifications:
___ Discontinue

Measurable objectives	
Recognize members' lifelong learning commitment through a membership-based program connected to educational accomplishments	
Distribute MRES Society information through eblasts and social media channels	
Increase MRES Society membership by 10%.	
Develop a strategy to create topical learning paths/infographics to assist new agent or members looking to take their career to the next level.	
Produce a minimum of 4 videos featuring members discussing the impact education courses had on their business success. (minimum of 4)	6
Provide MRES Society membership information to students in the GRI, rCRMS and CRPM classes (show them the path to the MRES Society membership and how the classes they are taking fit in)	
Solicit feedback from MRES members to evaluate membership value	
Explore and implement, if feasible, a lifetime member Platinum level category.	
Provide MRES Society members with access to a special education program.	

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Program, Product, Service or Activity (PPSA):

Property Management Certification
This program involves:

- Administration, delivery and marketing of CRPM certification program
- Timely Webinars
- Property Management Summit

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

This plan provides for an education certification program (CRPM) 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.
___ 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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_X__ 3. AAR provides members unsurpassed risk management tools.
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___ 6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect and engage with the membership and local associations.
.

Recommendations:
___ Continue basically as-is
_X__ Continue with the following modifications
Offer a Property Management Summit, increase instructor fee rate, increase number of live streaming classes.
___ Discontinue

Measurable objectives	
Members will have access to property management classes and the CRPM certification program at a competitive and	

affordable fees through partnership and live streaming.	
Maintain a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience to the program	
Receive favorable feedback regarding quality and relevance.	
Provide a easy to find master calendar and path earn the certification on CRPM webpage.	
Offer timely webinars focusing on property management issues	
Offer a summit that addresses property management issues and topics.	
Communicate upcoming classes to members and target area utilizing eblasts, video and social media.	
Announce and maintain a list of members who earned the CRPM certification.	

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

REALTOR Institute: GRI Designation
This program involves:

- Program administration and maintenance
- Curriculum maintenance and enhancements
- Education course for Designees
- Dedicated website enhancements and maintenance
- Marketing collateral and strategies
- 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.
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Recommendations:
___ Continue basically as-is
_X__ Continue with the following modifications
Replace designee education event with a webinar summit format featuring 5 national speakers.
___ Discontinue

Measurable objectives	
The GRI program is available and accessible to members throughout the state through live and live streamed classes.	
Partnerships are utilized to deliver GRI classes	
Provide GRI designees with access to a special education program.	
Communicate the value of the GRI program through eblasts, video, social media.	
Maintain and enhance the GRI website as needed	
Evaluate the program annually to ensure it is responsive to the changing industry.	
Student feedback is favorable regarding quality and relevance	
Survey designees who earned the GRI designation to measure how and what they implemented into their business practice as a result of what they learned in the GRI program	
Maintain, monitor and grow a cadre of qualified instructors who meet the established GRI instructor criteria, AAR Instructor standards and embrace leaner-centered teaching styles.	
Provide sufficient resources to update and	

refresh the Online Business Planning course	
Marketing messages focus on the value/benefits - connection to building a successful career	
Communication with to Brokers to emphasize the value of the program brings to their agents' business success and available scholarships	
Provide GRI Administrative Guide to course providers.	
Recognize new designees through social media and announcements and provide resources to help them promote their accomplishment.	
Provide a financial scholarship program to members.	
Monitor national trends in the GRI programs to keep AAR's GRI program growing and evolving.	
Monitor Student demographics.	

ARIZONA ASSOCIATION OF REALTORS®
2018 BUSINESS PLAN

Program, Product, Service or Activity (PPSA):

REALTOR Convention
This program involves planning, delivery and marketing of annual convention

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

This plan for a program that *provides sessions with a broad scope in national business practices, trends and techniques that focus on a successful real estate practice.* This event also includes AAR business meetings (Executive Committee, Regional Caucuses and the Board of Directors Meeting). Conference format varies from year to year.

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.
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Recommendations:
___ Continue basically as-is
__X_ Continue with the following modifications:
Increase attendance projections, speaker fees, production costs and registration fees, replace c/e classes with 1-day designation/certification classes.
___ Discontinue

Measurable objectives	
Offer a statewide conference 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.	
Feature national speakers to provide a broad scope in national business practices, trends and techniques.	
Provide retirement type session or workshop during convention	
Utilize a variety of marketing efforts to inform members of the convention and its value	
Positive feedback is received.	
Explore and evaluate areas/locations for convention in 2019	

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

Support & Resources
This program includes support programs including:

- Printing, copying and postage
- Committee, workgroup and task force support
- Reteach.us platform maintenance and enhancements
- Registration platform maintenance and enhancements
- Resources, tools, subscriptions and license fees for programs support activities
- Promotion and marketing efforts
- Video commercial production
- Program registration fee ETF expenses
- Conferences/training events

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 and set the standard in quality and meaningful education that positions the REALTOR member to succeed. Ultimate goal of all programs and activities ultimately lead to a culture of lifelong learning.

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.
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Recommendations:
_X__ Continue basically as-is
___ Continue with the following modifications:
___ Discontinue

Measurable objectives	
Appropriate groups are formed and kept updated throughout the year.	
Provide the necessary equipment, supplies, subscriptions, licenses and tools to implement the business plans, host/house online program and registration functions	
Production and editing of video commercials emphasizing the value of lifelong learning.	
Participate in local association and firm events, where available to promote AAR's educational programs and resources	
Review program messages and enhance where needed to connect message to business success.	
Develop easy to follow paths to earn the rCRMS, CRPM and GRI using infographic format.	
Develop and distribute printed collateral at AAR and/or local events.	
Work through appropriate committees to influence ADRE to permit C/E Credit for business-skill related topics	
Promote the use of the Reteach.us site.	
Employ technologies and resources to create and retain a state of the art learning environment available to members.	
Staff attends AAR, NAR and-Education-related conferences/forums.	

AAR Business Services & Technology
2018 Business Plan

From: **Business Services and Technology**
Chair: **Carlos Ramos**
Staff Liaison: **Nick Catanesi**
Date: **August 25, 2018**

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 is the most powerful and influential political force in Arizona.
X	3. AAR provides members with unsurpassed risk management tools.
	4. AAR sets the standard in quality and meaningful professional development that positions the REALTOR® member to succeed, and delivered to members in their moment of need.
X	5. AAR supports the success of REALTOR® members with business services.
	6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect, and engage the membership and local associations.

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, 2017.	
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

Tech 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:

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Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	
Market for member awareness and increased use	
Maintain positive member responses	

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. zipForm® Plus is provided to members as a benefit from NAR while zipForm® Standard and Mobile are provided as benefits from AAR.
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:

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	2. AAR is the most powerful and influential political force in Arizona.
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	6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect, and engage the membership and local associations.

Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	

Conduct trainings on a monthly/bi-weekly basis	
Maintain positive member responses	

Recommendation: Continue basically as-is

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
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Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	
Conduct trainings on a monthly/bi-weekly basis	
Maintain positive member responses	

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 (SP: 5.A) 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.

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X	6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect, and engage the membership and local associations.

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 (SP: 5.E).

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.

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
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	3. AAR provides members with unsurpassed risk management tools.
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	5. AAR supports the success of REALTOR® members with business services.
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Measurable Objectives	Status
Provide data analytics of AAROnline.com members logged-in.	

Develop "Enhanced Member Profile" through RAMCO conversion	
Build the system that will make RAMCO the data warehouse for the Enhanced Member Profile	

Recommendation: Continue basically as-is.

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.

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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	

Recommendation: Continue basically as-is.

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.

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	3. AAR provides members with unsurpassed risk management tools.
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X	6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect, and engage the membership and local associations.

Measurable Objectives	Status
Enhance disaster recovery infrastructure to maintain phone system in event of local physical failure	
Maintain a secure and reliable phone system	
Troubleshoot problems in a quick and efficient manner.	

Recommendation: Continue basically as-is

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.

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 is the most powerful and influential political force in Arizona.
	3. AAR provides members with unsurpassed risk management tools.
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	6. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect, and engage the membership and local associations.

Measurable Objectives	Status
Establish disaster recovery infrastructure to maintain phone system in event of local physical failure	
Maintain the network to ensure it remains secure and reliable	
Conduct vulnerability study and remediation by June 2017	

Recommendation: Continue basically as-is

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
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Measurable Objectives	Status
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.

MEMBER 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.

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Measurable Objectives	Status
Disseminate pertinent, relevant and timely industry and association information, (i.e.; social networks, website, video, newsletters, etc.).	
Create and update Communications and Public Relations plans for the organization based on members' interests and the coordinated efforts with area managers, local associations, and the Executive Committee by January 2017.	
Customize website content for individual users based on user-selected topics and actual use of the site.	
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 shared monthly.	
Organize information on the website for easy search and access by members.	
Implement a system to determine the preferred communications methods of our members and communicate with our members via segmented content by May 2017.	
Provide a consistent voice at AAR which will speak to advocacy efforts with a focus on consumer outreach and education to the public and members by making at least two posts to HomeOwnershipMatters.com/Arizona in 2017.	
Solicit community outreach efforts conducted by REALTOR® members and recognize them through an annual award.	
Promote the value and the "why" of the REALTOR® brand to our members by conducting a statewide consumer-directed event in 2017.	
Social media channels are managed and monitored to ensure a steady rise in engagement and alternate sources for members to receive information.	
Develop a system to foster discussions with member association for the purpose of delivering timely and relevant content by April 2017.	
Engage in regular outreach to members to elicit discussions by posing monthly questions on social media.	

Measurable Objectives (Cont.)	Status (Cont.)
Meet or exceed real estate industry email open and click-through rates with The Voice.	
Conduct member and consumer research as needed to provide information to decision makers by fielding at least two email surveys in 2017.	
Communicate the value and success of REALTOR® associations throughout the state by placing at least ten mentions in print or broadcast media in 2017.	

Recommendation: Continue with the following modifications – Continue basically as-is.