ARIZONA
association of
REALTORS®

2018 Strategic Plan

For Board of Directors

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