



**2019 Strategic Plan**  
**For Executive**  
**Committee Approval**

**Introduction:**

The strategic objectives in the Arizona REALTORS® 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 Arizona REALTORS® Vision is:**

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

**The Arizona REALTORS® 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 Arizona REALTORS® 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 27, 2018 in Phoenix. The participants included Arizona REALTORS® officers, directors, committee chairs/vice chairs, local association leaders and key Arizona REALTORS® personnel. The 2018 Strategic Plan created a solid foundation for the 2019 Strategic Plan so that the participants concentrated on specific questions posed to create programs and initiatives that support the association's culture.

The Arizona REALTORS® President-Elect Patrick Lewis and Jeff Turner 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 whether the Arizona REALTORS® have a role in global real estate that falls within the Arizona REALTORS® purpose, and if so, identifying the Arizona REALTORS® global Strategic Objective. The participants determined that a Presidential Advisory Group should be formed to examine the merits of a future global Strategic Objective in the Arizona REALTORS® Strategic Plan.

## AREA 1: GOVERNANCE AND OPERATIONS

**PURPOSE:** The Arizona REALTORS® 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:** The Arizona REALTORS® is an effective member directed, fiscally responsible, non-profit corporation.

**Actions:**

1. Continue to proactively research and review options for the Arizona REALTORS® efficiency improvement.
2. Maintain a staff succession plan.
3. Evaluate the need for additional bylaws and policies that define success/behaviors/standards for association primary committees and implement as advisable.
4. Evaluate the need for a more formalized system for primary committees to annually evaluate programs and communicate recommendations to incoming primary committee chairs and implement as advisable.

**Strategic Objective 1.B:** The Arizona REALTORS® 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:** The Arizona REALTORS® 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 Arizona REALTORS®.
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:** The Arizona REALTORS® leadership engages with local association leadership to strengthen the strategic partnership.

**Actions:**

1. Empower leadership with the tools to increase face-to-face conversations/training/education with the competent middle member where they live in their brokerages (Project “Belly-to-Belly”).
2. Provide a vehicle for feedback obtained from Project “Belly-to-Belly” on what is and is not working.

3. Develop the systems required to measure the success of Project “Belly-to-Belly.”
4. Develop and deliver monthly “talking points” on association activities to association RVPs and leadership.

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

**Strategic Objective 1.E:** The Arizona REALTORS® 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. Maintain MLS regional consolidation resources for local associations.

## **AREA 2: LEGISLATIVE & POLITICAL AFFAIRS OVERSIGHT - ADVOCACY**

**PURPOSE:** The Arizona REALTORS® is the most powerful and influential political force in Arizona.

**Strategic Objective 2.A:** The Arizona REALTORS® proactively advocates and protects private property rights and real property ownership.

**Actions:**

1. Articulate NAR's and/or Arizona REALTORS® 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:** The Arizona REALTORS® 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:** The Arizona REALTORS® leverages and maintains influential relationships.

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

**Strategic Objective 2.C:** The Arizona REALTORS® 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:** The Arizona REALTORS® provides members with unsurpassed risk management tools.

**Strategic Objective 3.A:** The Arizona REALTORS® forms establish the standard of care in the industry.

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

**Strategic Objective 3.B:** The Arizona REALTORS® monitors claims statistics to identify liability trends.

**Strategic Objective 3.C:** The Arizona REALTORS® maintains comprehensive and accessible legal information for member use.

**Actions:**

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

**Strategic Objective 3.D:** The Arizona REALTORS® provides programs for early and effective dispute resolution.

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

**Strategic Objective 3.F:** The Arizona REALTORS® 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. Maintain 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. Investigate and make a recommendation regarding the implementation of a Business Hotline for brokers to assist them in better business management.
4. Direct agents to their brokers.
5. Direct members to AARonline.com for relevant risk management resources.

**Strategic Objective 3.F.1:** The Arizona REALTORS® 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:** The Arizona REALTORS® acts as a conduit between associations on the national, state and local levels.

**Strategic Objective 3.G:** The Arizona REALTORS® 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:** The Arizona REALTORS® 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, Arizona REALTORS® Professional Standards benefits and results.

## **AREA 4: PROFESSIONAL & BUSINESS DEVELOPMENT**

**PURPOSE:** The Arizona REALTORS® 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 Arizona REALTORS® conferences and conventions to provide a broad scope in national business practices, trends and techniques.
4. Create content that articulates the REALTOR® value to the consumer – both on the agent and broker level. Deliver content to Business Services & Technology for creation of an online tool.

**Strategic Objective 4.A.1:** The Arizona REALTORS® works through appropriate channels to influence ADRE to permit c/e credit for business-skill related topics.

**Strategic Objective 4.B:** The Arizona REALTORS® provides comprehensive, reliable, and accessible professional development that is learner-centered to REALTOR® members.

**Actions:**

1. Provide resources to brokers that address the needs of the diverse brokerage community and actively promote existing education resources to the broker member.
2. Design educational programs that focus on building member success.
3. Provide materials to instructors to promote professionalism at every education opportunity.
4. Evaluate how an immersive learning experience can be incorporated into Arizona REALTORS® programs.
5. Identify the attributes of professionalism and explore the feasibility of developing educational programs/resources.

**Strategic Objective 4.C:** The Arizona REALTORS® develops new volunteer leaders.

**Actions:**

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

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



**Strategic Objective 4.D:** The Arizona REALTORS® employs technologies and resources to create a state of the art learning environment available to members.

**Actions:**

1. Investigate the feasibility of developing a mentorship in a box template for agents that brokerages can use.

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

**Strategic Objective 4.F:** The Arizona REALTORS® attracts, retains and develops instructors who have exceptional skills and embrace modern teaching techniques.

**Strategic Objective 4.G:** The Arizona REALTORS® offers a premier annual REALTOR® event that: (1) energizes members and leaves them full of passion for the real estate industry and their business; (2) provides an opportunity for members to build their networks; (3) provides an opportunity to discover best practices; and (4) helps members understand the Arizona REALTORS® value proposition.

**Actions:**

1. Promote the date a year in advance
2. Provide sessions that assist members in enhancing their business, such as lead generation, top producer panels, best practices and business planning.
3. Provide sessions that assist members in understanding the Arizona REALTORS® value proposition and benefits, such as use of association business tools, risk management resources, legal updates, and legislative/political advocacy efforts.
4. Provide energizing networking opportunities.
5. Investigate partnership/promotion opportunities with brokerages, builders, and other real estate related organizations.
6. Investigate third party marketing with RFP and retain if advisable.

## **AREA 5: BUSINESS SERVICES & TECHNOLOGY**

**PURPOSE:** The Arizona REALTORS® support the success of REALTOR® members with business services.

**Strategic Objective 5.A:** The Arizona REALTORS® controls and provides the delivery of Arizona REALTORS® forms to the members as a member benefit.

**Strategic Objective 5.B:** The Arizona REALTORS® provides technology tools, other than forms delivery, as a member benefit only if: the Arizona REALTORS® is in a unique position to provide the tool; the tool creates value statewide; or the tool advances the real estate industry and the Arizona REALTORS® Vision.

**Actions:**

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

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

**Actions:**

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

**Strategic Objective 5.D:** The Arizona REALTORS® negotiates discounts for products and services that benefit members and consistently market those offerings.

**Strategic Objective 5.E:** The Arizona REALTORS® develops and maintains data, beginning with an enhanced member profile, to better understand member needs; communicate more effectively with members; and maximize adoption of Arizona REALTORS® programs and services.

**Actions:**

1. Research and inform members on how to choose the right technologies for business through multiple channels of communication.
2. Investigate strategies for member communications via the Single Sign-On platform using targeted pop-up messaging based on criteria from the enhanced member profile data within RAMCO.

**Strategic Objective 5.F:** The Arizona REALTORS® explores, identifies and recruits members who are technologically adept to enhance the goals of the committee.

**Actions:**

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

## AREA 6: COMMUNICATIONS AND CONSUMER OUTREACH

**PURPOSE:** The Arizona REALTORS® 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:** The Arizona REALTORS® disseminates pertinent, relevant and timely industry information.

**Strategic Objective 6.B:** The Arizona REALTORS® engages in regular outreach to members and local associations to offer shared communication services and identify unique needs.

**Strategic Objective 6.C:** The Arizona REALTORS® reviews, on an ongoing basis, best practices in website navigation, search and user interface and integrates these practices into Arizona REALTORS® 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.

**Actions:**

1. Organize information on the website for easy search and access by members.
2. Create an online tool that will build a “listing” presentation sheet/slide/flyer that may be used by members to articulate the REALTOR® value to the consumer utilizing content developed by the Professional & Business Development Committee.

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

**Actions:**

1. Implement a system to find out the preferred communications methods of our members and communicate with our members via segmented content.
2. Develop a system to measure segmented responses.
3. Investigate and make recommendations regarding the use of text as a primary source of member communication.

**Strategic Objective 6.D:** The Arizona REALTORS® will engage in not less than four consumer outreach activities.

**Strategic Objective 6.D.1:** The Arizona REALTORS® will be the “Voice for Real Estate” in Arizona.

**Strategic Objective 6.D.2:** The Arizona REALTORS® will invest in and promote community involvement activities.

**Strategic Objective 6.D.3:** The Arizona REALTORS® will consistently communicate advocacy efforts.

**Actions:**

1. Provide a consistent Arizona REALTORS® voice which will speak to advocacy efforts with a focus on consumer outreach and education to the public and members.

**Strategic Objective 6.E:** The Arizona REALTORS® promotes the value of using REALTORS®.

**Actions:**

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

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

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

**Actions:**

1. Investigate the value of a social media policy for members serving on Primary Committees and make a recommendation to the Executive Committee if advisable.
2. Regularly communicate association initiatives and work in progress to members.

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

**Actions:**

1. The Arizona REALTORS® promotes real estate as a first-time profession to high schools, junior colleges and colleges.

**Strategic Objective 6.I:** Investigate retaining a third-party marketing firm to assist in identifying, defining, creating and accomplishing measurable member communication efforts.

*Note: The above Objectives and Actions are not in priority order.*

**ARIZONA 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**

**Arizona REALTORS®**  
**OPERATIONS AND STRATEGIC INITIATIVES**  
**2019 Business Plan**

**FROM:** Operations & Strategic Initiatives  
**Chair:** Gary Nelson, Treasurer  
**Staff Liaison:** K. Michelle Lind, Esq., CEO  
**DATE:** 2019

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**

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- 
- 

**RECOMMENDATIONS**

**GROUPS FORMED**

**BOARD OF DIRECTORS**

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

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

- 1. Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. Arizona REALTORS® is the most powerful and influential political force in Arizona.
- 3. Arizona REALTORS® provides members unsurpassed risk management tools.
- 4. Arizona REALTORS® 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. Arizona REALTORS® supports the success of REALTOR® members with business services.
- 6. Arizona REALTORS® 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 2020 BOD based on 12/31/18 membership numbers.	
Establish recommendations for allocation of surplus from 2018 operating budget for BOD approval.	
Begin 2020 officer election process. Announce deadline and application submission dates. Submit 2020 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.	
Evaluate the need for additional bylaws and policies that define success/behaviors/standards for association primary committees and implement as advisable.	
Draft, update and distribute meeting agendas and materials for the Board of Directors meetings in a timely manner.	
Maintain at least 80% attendance by Directors.	<ul style="list-style-type: none"> <li>• ___ % - March meeting</li> <li>• ___ % - October meeting</li> </ul>

**Recommendation:**

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

**EXECUTIVE COMMITTEE**

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

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

1. Arizona REALTORS® 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. Arizona REALTORS® 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. Arizona REALTORS® supports the success of REALTOR® members with business services.  
 6. Arizona REALTORS® 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
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 2020 to be approved by ExCom in January and BOD at March meeting.	
Assist President-elect in identifying members, scheduling and organizing planning session for 2020. Coordinate Planning Session outcomes, distribute Strategic Plan to attendees for comment. Distribute Strategic final plan for implementation in business plans and budget.	
Update the Arizona REALTORS® officer position description and activity checklists. Distribute job descriptions and budgeted expense and	

reimbursement expectations to line officers and executive committee members.	
Evaluate the need for additional bylaws and policies that define success/behaviors/standards for association primary committees and implement as advisable.	
Evaluate the need for a more formalized system for primary committees to annually evaluate programs and communicate recommendations to incoming primary committee chairs and implement as advisable.	
Empower leadership with the tools to increase face-to-face conversations/training/education with the competent middle member where they live in their brokerages (Project “Belly-to-Belly”).	
Provide a vehicle for feedback obtained from Project “Belly-to-Belly” on what is and is not working.	
Develop the systems required to measure the success of Project “Belly-to-Belly.”	
Develop and deliver monthly “talking points” on association activities to association RVPs and leadership.	
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, September and October in a timely manner.	
Maintain at least 80% attendance by committee members.	<ul style="list-style-type: none"> <li>• ___% - January meeting</li> <li>• ___% - March meeting.</li> <li>• ___% - June meeting</li> <li>• ___% - 2019 Budget meeting</li> <li>• ___% - October meeting</li> </ul>

**Recommendation:**

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



## **ASSOCIATION RELATIONS**

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

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

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

2. Arizona REALTORS® is the most powerful and influential political force in Arizona.

3. Arizona REALTORS® provides members unsurpassed risk management tools.

4. Arizona REALTORS® 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. Arizona REALTORS® supports the success of REALTOR® members with business services.

6. Arizona REALTORS® 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.

<b>Measurable Objectives</b>	<b>Status</b>
Complete the NAR Mandatory Core Standards Compliance form for Arizona REALTORS® 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 Arizona REALTORS® activities.	
Coordinate with local associations regarding NAR's Association Executive Institute.	
Figure 2020 director entitlements for local associations using 12/31/18 membership report.	
Determine which Arizona AEs are eligible to serve on 2020 BOD.	
Partner with local associations to provide new REALTOR® orientation resources to include Arizona REALTORS®.	
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.	
Arizona REALTORS® 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 members to utilize REALTOR® brands (products and services).	

**Recommendation:**

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

## CONSUMER OUTREACH

The Arizona REALTORS® 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. Arizona REALTORS® 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. Arizona REALTORS® 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. Arizona REALTORS® supports the success of REALTOR® members with business services.
- 6. Arizona REALTORS® 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.	<input type="checkbox"/> earned media spots as of ___/___/19 See: <a href="http://www.aaronline.com/press/">www.aaronline.com/press/</a>
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 Arizona REALTORS® as a source of credible information about Arizona real estate issues.	

**Recommendation:**

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

## **NATIONAL ASSOCIATION**

The Arizona REALTORS® 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.

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- 5. Arizona REALTORS® supports the success of REALTOR® members with business services.
- 6. Arizona REALTORS® 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:**

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

## **REGION 11**

The Arizona REALTORS®, as a member of Region 11, plays a vital role in its influence on NAR policy and decision making. Arizona REALTORS® 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.

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- 6. Arizona REALTORS® 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:**

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

## DUES/FINANCIAL

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

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

1. Arizona REALTORS® 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. Arizona REALTORS® 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. Arizona REALTORS® supports the success of REALTOR® members with business services.
6. Arizona REALTORS® 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 Arizona REALTORS®'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 Arizona REALTORS® efficiency.	
Prepare suggested budget adjustments, if necessary, for ExCom consideration.	
Monitor: <ul style="list-style-type: none"> <li>• Capital Reserve fund account balances</li> <li>• Operating and Strategic Initiative Reserve accounts</li> <li>• RAPAC and Issues Mobilization accounts</li> </ul> and ensure adherence to bylaws and investment policy.	
Reconcile all Arizona REALTORS® checking accounts monthly (Arizona REALTORS®, 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 (Arizona REALTORS®, ARDAF, ARFHCO, RAPAC).	
Prepare and finalize 2020 Operating and Capital budget with the 2020 Executive Committee and Board of Directors.	

**Recommendation:**

- Continue basically as-is

- Continue with the following modifications  
 Discontinue

## **BUILDING**

The Arizona REALTORS®'s building is an asset and its equity will be vigilantly monitored.

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

1. Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.  
 2. Arizona REALTORS® is the most powerful and influential political force in Arizona.  
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Measurable Objectives	Status
Address on-going building maintenance needs and report any critical issues to the Executive Committee.	
Assist property manager in working with tenants to maintain lease agreements.	
Conduct thorough review of Arizona REALTORS® building infrastructure and make recommendations for needed improvements in the 2020 Capital Budget.	

**Recommendation:**

- 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. The Arizona REALTORS® must have knowledgeable staff that can serve as leaders in the industry.

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

1. Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.  
 2. Arizona REALTORS® is the most powerful and influential political force in Arizona.  
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 6. Arizona REALTORS® 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
Analyze personnel/overhead needs based on the Association's business plans.	
Retain a well-trained, capable staff.	

Maintain positive staff response to member needs.	
Maintain a staff succession plan.	

**Recommendation:**

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

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

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

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

**Recommendation:**

- 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 ARIZONA REALTORS® members as well as an EAH program to state and local association employees.

Measurable Objectives	Status
Coordinate annual audit.	
Provide in-kind staff time to effectively manage 501(C)(3) per its bylaws.	

**Recommendation:**

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

**AAR LEGISLATIVE AND POLITICAL AFFAIRS**  
**2019 Business Plan**

**Committee:** Legislative and Political Affairs  
**Chair:** Vice Chair Shelly Ostrowski  
**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.

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
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- 6. The Arizona REALTORS® 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.

<b>Measurable Objective</b>	<b>Target Date</b>	<b>Status</b>
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	1/19	
Oversee the FPCs quality contact with their representative or their staff within	Quarterly	



D.C. or Arizona, ensuring attendance at required meetings, training sessions and fundraisers		
Ensure FPCs attend required Mid-Year meetings	5/19	
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	12/19	
Maintain strong communication with Congressional staff through ongoing contacts on issues important to Arizona	12/19	
Attendance at meetings with Members of Congress during the NAR Mid-Year Hill Visits is by invitation only	5/19	
Ensure compliance that FPCs meet any NAR requirements	12/19	

**Recommendations:**

- 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.

- 1. The Arizona REALTORS® 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. The Arizona REALTORS® 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.

<b>Measurable Objective</b>	<b>Target Date</b>	<b>Status</b>
Finalize the political activities fundraising plan by December 31st by the previous plan year	12/19	
Identify members to participate in the annual REALTOR® Party training	6/19	
Provide fundraising tips, tools and promotional materials for local associations	9/19	
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	10/19	
Utilize the NAR RAPAC Grant stipend for promotion of RAPAC	12/19	
Utilize the Major Investor Program NAR stipend to host an AAR Major Investor Event	12/19	
Achieve participation of local associations in Major Investor Events	12/19	
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	12/19	
Achieve 100% or NAR Major Investor Goal for 2019. Benchmarks: 50% of goal by April; 75% of goal by June; 100% by September 30.	12/19	
Recognize Major Investors with gift	12/19	
Recognize President Circle members with gift	12/19	
Communicate state and federal election law requirements to local associations in order for RAPAC to remain in compliance at the state and federal level	12/19	
Host a fundraising event at the Spring Conference/Convention	4/19	
Host a fundraising event at the Leadership Conference	10/19	
Recognize RAPAC Major Investors on aaronline.com	12/19	
Recognize RAPAC Major Investors with special recognition at Capitol Day	1/19	

Recognize RAPAC Major Investors with special recognition at REALTOR® Caucus	9/19	
Maintain Leadership Appreciation Program to connect AAR leaders with Major Investors for recognition of investment	12/19	
Increase use of Placemaking and Smartgrowth grants by 50% over 2017 utilization by local associations	12/19	
Utilize REALTOR® Party Plus fundraising analytics and predictive models to identify likely and high dollar donors for use in achieving RAPAC goal	12/19	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue

- Remove “percentage” from “Achieve *percentage* participation of local associations in Major Investor Events” in order to promote participation from all local associations. Previous objective did not identify a percentage number.

**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. The Arizona REALTORS® 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. The Arizona REALTORS® 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	12/19	

the REALTOR® Voice, AAR blog and alternative forms of media distribution.		
Produce videos for membership outreach as needed on Legislative and Political Affairs topics to include, but not limited to, the REALTOR® Party.	As Required	
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	
Work with REALTOR® Party Plus to increase opt-in for text response Calls for Action	12/19	
Utilize digital advertising and technologies to push federal CFAs to members	12/19	
Maintain current information on each governmental program at aaronline.com	12/19	
Communicate with Big Yam for press releases when large successes occur or the consumer needs to be educated on the associations wins	12/19	
Communicate how Issues Mobilization and RAPAC reserves can enhance local association political objectives	12/19	
Communicate the importance of AAR's legislative/political successes to members	12/19	
Continue to communicate the mechanism by which members can relay, on a year-round basis, legislative comments and proposals	12/19	
Utilize the broker involvement program/stipend to identify and train local brokers for grassroots education efforts on participation in NAR calls for action	12/19	
Work with REALTOR® Party Plus to identify a predictive model to target members for increased activism on legislative issues and advocacy initiatives	12/19	
Explore the use of geofencing, beacon and direct one-to-one digital advertising technologies for concentrated message delivery	12/19	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue

- **Modify legislative videos to “as needed” versus “quarterly” to more accurately reflect video production for Government Affairs Department.**
- **Remove “establish a system to enroll and automatically respond on a members behalf to state and national Calls to Action” as it conflicts with enrollment privacy policies.**

### **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.

1. The Arizona REALTORS® 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 Objective	Target Date	Status
Assign tasks to all governmental area work groups within approved budget parameters	12/19	
Implement a “Thank You” for each of the four government affairs committees.	12/19	

**Recommendations:**

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. The Arizona REALTORS® 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 Objective	Target Date	Status
Activate broad-based AAR membership representation in lobbying activities through legislative committee appointments and related committee activities	12/19	
Encourage application to state boards and commissions	12/19	
Strengthen and maintain relationships with Arizona statewide officeholders and agency department heads	12/19	
Strengthen and maintain relationships with housing industry partners through ongoing communications	12/19	
Achieve an 85% success rate on AAR legislative policy priorities	6/19	
Conduct daily monitoring of legislation and recommend positions to the Legislative Committee in conjunction with the approved Legislative Policy Statements	6/19	
Monitor member involvement in political campaigns	12/19	
Finalize 2020 legislative priority list is finalized by October 2019	10/19	
Evaluate state-level candidates on AAR legislative policies and voting record to receive funds	8/19	

**Recommendations:**

- 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.

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
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Measurable Objective	Target Date	Status
Poll members for their opinions through use of formal and informal methods	12/19	
Continue to involve stakeholders on real estate related issues	12/19	
Encourage proportional regional representation at the REALTOR® Caucus	9/19	
Forward all legislative recommendations to the Legislative and Political Affairs Committee for review and appropriate action	9/19	
Host 2019 REALTOR® Day Luncheon	1/19	
Identify for participation in or host a second legislator event	12/19	
Achieve attendance of 65% of legislators at legislative events	6/19	
Identify attendees for legislator events through political involvement and leadership activity	12/19	

**Recommendations:**

- 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	12/19	
Encouraged local associations to establish an advocacy program and provide assistance as requested	12/19	

**Recommendations:**

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.

1. The Arizona REALTORS® 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 Objective	Target Date	Status
Conduct research as needed	12/19	
Work with REALTOR® Party Plus to utilize predictive models to obtain comprehensive analysis of membership as well as election data	12/19	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue



## 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.

- 1. The Arizona REALTORS® 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 Objective	Target Date	Status
Encourage members to register to vote	12/19	
Establish protocol for a “Get Out the Vote” campaign for use in 2020 election cycle	11/19	

**Recommendations:**

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

**The Arizona REALTORS® Risk Management Committee  
2019 Business Plan**

**FROM:** Risk Management Committee (RMC)  
**Chairman:** Lisa Paffrath  
**Vice Chairman:** Jim Durham  
**RMC Liaison:** Scott M. Drucker  
**DATE:** January 1, 2019

**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 The Arizona REALTORS® 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 Arizona REALTORS® Purpose.

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

- 1. The Arizona REALTORS® 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. The Arizona REALTORS® 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.
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**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• GVC: Prompt review of complaints</li> </ul>	
<ul style="list-style-type: none"> <li>• PSC: Complete ethics cases promptly</li> </ul>	

<ul style="list-style-type: none"> <li>• PSC: Complete arbitrations promptly</li> </ul>	
<ul style="list-style-type: none"> <li>• Update PS policy adaptations as necessary</li> </ul>	
<ul style="list-style-type: none"> <li>• Reinforce, on a continuing basis PS benefits and results</li> </ul>	

**Recommendations:**

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

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

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® 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 Arizona REALTORS® Purpose.

**Measurable Goals:**

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

**Recommendations:**

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

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

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® 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 Arizona REALTORS® Purpose.

**Measurable Goals:**

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

**Recommendations:**

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

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

This program includes training for members of Grievance and Professional Standards Committees and The Arizona REALTORS® Mediators and Ombudsmen.

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® 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 Arizona REALTORS® Purpose.

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"><li>• Offer PS Training for GVC and PS Committee</li></ul>	
<ul style="list-style-type: none"><li>• PS Policy &amp; Training Workgroup meeting</li></ul>	
<ul style="list-style-type: none"><li>• Offer Mediator training</li></ul>	
<ul style="list-style-type: none"><li>• Offer Ombudsman training</li></ul>	
<ul style="list-style-type: none"><li>• Offer hearing panel chair training</li></ul>	
<ul style="list-style-type: none"><li>• Publish PS, Mediation and Ombudsman information</li></ul>	
<ul style="list-style-type: none"><li>• PS outreach to members</li></ul>	

**Recommendations:**

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

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

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® 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
<ul style="list-style-type: none"><li>• Offer an effective Buyer-Seller Dispute Resolution program</li></ul>	
<ul style="list-style-type: none"><li>• Recruit effective Buyer-Seller Dispute Resolution providers</li></ul>	
<ul style="list-style-type: none"><li>• Ensure compliance of Buyer-Seller Dispute providers with program's directives</li></ul>	
<ul style="list-style-type: none"><li>• Receive positive feedback from Buyer-Seller Dispute Resolution program evaluations</li></ul>	

**Recommendations:**

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

**RISK MANAGEMENT**

**Forms Development** This program involves:

**Creation of workgroups**

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

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

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

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

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

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
- 3. The Arizona REALTORS® provides members unsurpassed risk management tools.
- 4. The Arizona REALTORS® 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. The Arizona REALTORS® supports the success of REALTOR® members with business services.
- 6. The Arizona REALTORS® 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
<ul style="list-style-type: none"> <li>• Workgroups formed as necessary</li> </ul>	
<ul style="list-style-type: none"> <li>• Protect our forms copyright</li> </ul>	
<ul style="list-style-type: none"> <li>• Forms drafted or revised for introduction in February, June and October</li> </ul>	
<ul style="list-style-type: none"> <li>• Deliver timely forms information/education</li> </ul>	
<ul style="list-style-type: none"> <li>• Promote and update the educational tool kit for teams and brokers on best practices and guidelines for management of teams</li> </ul>	
<ul style="list-style-type: none"> <li>• Promote and update a webpage that includes safety education, incident recordation and contemporaneous incident notification via a REALTOR® text alert system (ASAP)</li> </ul>	

**Recommendations:**

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

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

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

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® 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
<ul style="list-style-type: none"> <li>• Promote Hotline usage</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline to prepare ten Q&amp;As on current issues/current “hot topics” six times per year for the Arizona REALTOR® Voice and The Arizona REALTORS® website</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline to maintain statistics on number and types of calls in cooperation with The Arizona REALTORS® staff</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline attorney to attend The Arizona REALTORS® Risk Management Committee or Workgroup meetings as requested</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline attorney to review new or revised Arizona REALTORS® forms and notify The Arizona REALTORS® of any legal concerns or recommendations</li> </ul>	
<ul style="list-style-type: none"> <li>• Hotline attorney to consult with The Arizona REALTORS® General Counsel on legal issues as requested</li> </ul>	
<ul style="list-style-type: none"> <li>• Evaluate Hotline program by surveying members</li> </ul>	
<ul style="list-style-type: none"> <li>• Form Hotline Workgroup to evaluate program</li> </ul>	

**Recommendations:**

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

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

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

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

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Maintain claims statistics to identify liability trends</li> </ul>	
<ul style="list-style-type: none"> <li>• Foster alliances with defense attorneys and E&amp;O carriers and mediators</li> </ul>	
<ul style="list-style-type: none"> <li>• Monitor marijuana legal conflicts, solar, marketing service agreements, and comfort animals - Keep members informed as these issues evolve</li> </ul>	
<ul style="list-style-type: none"> <li>• Educate agents on potential ethical and legal liabilities associated with off-market listings</li> </ul>	
<ul style="list-style-type: none"> <li>• Share with agents the dangers posed by social media</li> </ul>	
<ul style="list-style-type: none"> <li>• Increase promotion and education of federal regulatory changes and enforcement; respond to changes and monitor</li> </ul>	
<ul style="list-style-type: none"> <li>• 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</li> </ul>	
<ul style="list-style-type: none"> <li>• Monitor the Americans with Disabilities Act website accessibility issues and keep members informed as the issue evolves</li> </ul>	
<ul style="list-style-type: none"> <li>• Collaborate with local associations, regional vice presidents and multiple listing services to identify risk management needs for members, associations and regions</li> </ul>	

**Recommendations:** **Continue basically as-is** **Continue with the following modifications** **Discontinue****Legal & Industry Publications** This program includes:

- Risk Management articles for The Arizona REALTORS® publications, ASREB Journal and other publications
- Articles on emerging legal issues for The Arizona REALTORS® 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 The Arizona REALTORS® 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 Arizona REALTORS® Vision.

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

**Measurable Goals:**

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

**Recommendations:**

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

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

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

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® 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 Arizona REALTORS® Purpose, it is essential that our members have access to timely Arizona-specific legal, legislative, and risk management information and education.

**Measurable Goals:**

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



**Recommendations:**

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

**Legislative Support** This program includes:

- Provide input on industry issues
- Assist The Arizona REALTORS® 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 The Arizona REALTORS® vision:**

Representation on legislative issues that affect The Arizona REALTORS® member’s livelihood and success is a real solution for members striving to achieve The Arizona REALTORS® Purpose.

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

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Successful outcome in legislation supported and successful defeat of legislation opposed</li> </ul>	
<ul style="list-style-type: none"> <li>• Promote laws (legislative and case law), regulations, and standards of practice that reduce member liability</li> </ul>	

**Recommendations:**

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

**REGULATORY ISSUES** This plan includes:

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

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® vision:**

Representation on regulatory issues that affect The Arizona REALTORS® members’ livelihood and success is a real solution for members achieving the The Arizona REALTORS® Purpose.

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

**Measurable Goals:**

Measurable objectives	Status
<ul style="list-style-type: none"> <li>• Negotiation of reasonable regulatory rules and policies that are acceptable to The Arizona</li> </ul>	

REALTORS® members and do not hinder their success	
<ul style="list-style-type: none"> <li>• Maintain contact with ADRE Advisory Board</li> </ul>	

**Recommendations:**

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

**General Programs**

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

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

**Brief description of how the PPSA contributes to achieving The Arizona REALTORS® 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 The Arizona REALTORS® members with the most up-to-date information on Professional Standards, legal, legislative, regulatory and industry issues.

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

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

**Recommendations:**

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

## Related Activities without Direct Committee Oversight

### Legal Counsel

- Provide guidance to leadership and CEO on association legal concerns
- Review and advise on building/tenant issues and related contracts
- Review and advise on affinity agreements
- Prepare memoranda on legal issues as they arise
- Provide limited advice and guidance to local associations
- Respond to member inquires as appropriate

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

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

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

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
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- 6. The Arizona REALTORS® 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
<ul style="list-style-type: none"><li>• CEO, state leadership, committees, and local association executives are informed on legal issues and questions satisfactorily answered.</li></ul>	

### **Recommendations:**

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

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

- Draft Amicus Briefs and monitor litigation and potential litigation or disputes in which The Arizona REALTORS® 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 The Arizona REALTORS® on any claims or issues

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

**Importance of PPSA to the critical-to-serve customer:** Protecting The Arizona REALTORS® and its members' legal interests is key to allowing members the ability to achieve The Arizona REALTORS® Purpose.

**Measurable Goals:**

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

**Recommendations:**

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

ARIZONA ASSOCIATION OF REALTORS®  
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**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*

**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.

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

1. The Arizona REALTORS® 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. The Arizona REALTORS® provides members unsurpassed risk management tools.

4. The Arizona REALTORS® 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.

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**Recommendations:**

Continue basically as-is

Continue with the following modifications:

Discontinue

**Develop and implement a drip campaign to increase awareness of the skill development/operational resources available to brokers/manager; Explore “broker in a**

box” development; Develop agent mentor program resources for brokerages; Increase awareness of the courses available through the CRB program.

**Measurable objectives:**

<b>Measurable objectives</b>	
Design and deliver a broker summit that addresses the needs of the diverse brokerage community	
Develop, partner and/or provide programs that focus on operational competencies.	
Programs receives a minimum of 80% attendee satisfaction.	
Design and deliver a communication campaign connecting the value of AAR’s education programs to the broker and their agents.	
Offer a minimum of two Broker Management Clinics that incorporate practical based content.	
Produce and distribute a minimum of two webinars focusing on issues important to brokers.	
Develop and implement a drip campaign to increase awareness of the skill development/operational resources available to them.	
Continue to produce and distribute the Mack In A Minute video series.	
Develop a list of topics that should be included in an agent mentor program as well as resources that can be used by brokerages.	
Explore the feasibility and need to develop a “broker in a box” product.	

ARIZONA ASSOCIATION OF REALTORS®  
**2019 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. The Arizona REALTORS® 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. The Arizona REALTORS® supports the success of REALTOR® members with business services.
- 6. The Arizona REALTORS® 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
- Continue with the following modifications
- Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	
Offer a minimum of 10 live rCRMS classes and 4 live streamed rCRMS classes through association partnerships and live streaming at a competitive and affordable price.	

Monitor attendee feedback to update curriculum as needed.	
Maintain a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience to the program.	
Maintain a dedicated instructor page to house course materials.	
Offer rCRMS certification holders discounted class registration fees.	
Strengthen the value proposition message for CRMS program marketing.	
Recognize newly certified members on AAR facebook page and announced to local associations.	



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

**Education Outreach**

This program involves:

1. Delivery, admin and resources for education programs through partnerships
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. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
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- .

**Recommendations:**

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

Develop infographics connecting education resources and professionalism; Explore online pre-licensing programs/vendors.

**Measurable objectives:**

<b>Measurable objectives</b>	
Maintain and grow a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience and classroom engagement to the classes.	
Offer, through partnership and revenue share opportunities with local associations and brokerages, a minimum of 3 REBAC courses, and 11 days of live streamed c/e classes with competitive and affordable registration fees.	
Provide resources for instructors to incorporate engagement activities into live streaming classes.	
Provide local associations with an education reference guide.	
Deliver an Annual Trends Summit featuring national speakers for changing trends and business practices in the industry.	
Engage in opportunities or partnerships to provide new agent resources/training opportunities.	
Explore the feasibility of working with online vendors who provide online pre-licensing programs.	
Compile and package AAR's existing micro-learning content into an easy to find resource.	
Create infographic connecting educational resources that are available to the attributes of a professional.	

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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6. The Arizona REALTORS® 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

Continue with the following modifications:

Discontinue

Create content that articulates REALTOR value and deliver to BS&T team, enhance utilization of gamification elements into courses

**Measurable objectives:**

<b>Measurable objectives</b>	
Maintain and update learning management platform license.	
Monitor and enhance live streaming platform to ensure it provides an effective learning experience.	
Incorporate gamification elements into education programs.	
Curriculum development and delivery resources are available to develop quality programs.	
Produce a minimum of 3 Contract Conversation videos.	
Create content that articulates the REALTOR value to the consumer, both on the agent and broker level and deliver it to the BS&T team.	

ARIZONA ASSOCIATION OF REALTORS®  
**2019 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. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.

2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.

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6. The Arizona REALTORS® 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

Continue with the following modifications:

Discontinue

**Distribute NAR Commitment to Excellence information to instructors for their use in promoting professionalism in their classes**

**Measurable objectives:**

<b>Measurable objectives</b>	
Provide a minimum of one Instructor Development Workshop to continually grow their skills and understanding of the needs of the modern learner.	
Provide training and resources to AAR's instructors who teach AAR's live streaming classes.	
Develop teaching tip/best practice and classroom management video snippets for AAR classes.	
Monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	
Distribute information about NAR's Commitment to Excellence program and encourage instructors to promote it in their classes.	
Provide one scholarship to the Bob Pike Train the Trainer for one new AAR instructor who would 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.

1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
3. The Arizona REALTORS® provides members unsurpassed risk management tools.
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**Recommendations:**

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

**Measurable objectives:**

<b>Measurable objectives</b>	
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.	



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
- 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.

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

2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.

3. The Arizona REALTORS® provides members unsurpassed risk management tools.

4. The Arizona REALTORS® 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. The Arizona REALTORS® supports the success of REALTOR® members with business services.

6. The Arizona REALTORS® 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

Continue with the following modifications;

Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	
------------------------------	--

Offer an annual conference for incoming leadership and members who wish to become leaders.	
Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	
Develop and/or partner to offer educational events, classes and opportunities to enhance leadership skills.	

ARIZONA ASSOCIATION OF REALTORS®  
**2019 BUSINESS PLAN**

**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
- 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.

1. The Arizona REALTORS® 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. The Arizona REALTORS® 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

Continue with the following modifications:

Discontinue

Monitor and promote NAR's Commitment to Excellence program, develop talking points for MRES Society members and encourage them to promote life long learning to their peers.

**Measurable objectives:**

<b>Measurable objectives</b>	
Recognize members' lifelong learning commitment through a membership-based program connected to educational accomplishments.	
Distribute MRES Society information through targeted eblasts, rCRMS/GRI classes and social media channels.	
Increase MRES Society membership by 10%.	
Create topical learning paths/infographics to assist new agent or members looking to take their career to the next level.	
Monitor and promote NAR's Commitment to Excellence program.	\$0
Solicit feedback from MRES members to evaluate membership value.	
Develop talking points regarding the value of life long learning and distribute to MRES Society members to help them serve as Ambassadors/Mentors.	
In partnership with the GRI program to offer MRES Society members access to a special education program.	
Develop campaign that emphasizes the benefits and value of lifelong learning.	

ARIZONA ASSOCIATION OF REALTORS®  
**2019 BUSINESS PLAN**

**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.

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6. The Arizona REALTORS® 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

Continue with the following modifications

Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	
Offer a minimum of 10 live CRPM classes and 4 live streamed classes at a competitive and affordable fee through partnership with local associations, firms and NARPM.	
Maintain a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience to the program.	
Maintain an 80% student satisfaction in all classes.	
Offer a minimum of 2 timely webinars focusing on property management issues.	
Offer a Summit that addresses property management issues and topics.	
Announce and maintain a list of members who earned the CRPM certification on facebook and to local associations.	

ARIZONA ASSOCIATION OF REALTORS®  
**2019 BUSINESS PLAN**

**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

Continue with the following modifications

Discontinue

**Measurable objectives:**

<b>Measurable objectives</b>	
The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	
In partnership with the MRES Society, provide GRI designees with access to a special education program.	
Maintain and enhance the GRI website as needed.	
Evaluate the program annually to ensure it is responsive to the changing industry.	
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 learner-centered teaching styles.	
Provide sufficient resources to update and maintain the Online Business Planning course.	
Marketing messages will focus on the value/benefits - connection to building a successful career.	
Communicate quarterly with Brokers to emphasize the value 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.	
Compile and Monitor student demographics.	\$0





ARIZONA ASSOCIATION OF REALTORS®  
**2019 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. The Arizona REALTORS® 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. The Arizona REALTORS® provides members unsurpassed risk management tools.
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- 6. The Arizona REALTORS® 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  
 Continue with the following modifications:  
 Discontinue

Enhance marketing efforts and production costs; reformat registration fee structure; investigate partnership/promotion opportunities

**Measurable objectives**

<b>Measurable objectives</b>	
Offer a statewide <u>convention</u> 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 energizing networking opportunities.	
Feature national speakers to provide a broad scope in national business practices, trends and techniques.	
Utilize a variety of marketing efforts to inform members of the convention and its value -promote date and location one year in advance.	
Provide sessions that assist members in enhancing their business such as lead generation, top producer panels, best practices and business planning.	\$0
Provide sessions that assist members in understanding the Arizona REALTORS value proposition and benefits, such as the use of association business tools, risk management resources, legal updates and legislative/political advocacy efforts.	
Investigate partnership/promotion opportunities with brokerages, builders and other real estate related organizations.	
Investigate third party marketing with RFP and retain if advisable.	
Explore and evaluate areas/locations for the convention in 2021.	
Develop talking points and distribute to RVP's	

**ARIZONA ASSOCIATION OF REALTORS®**  
**2019 BUSINESS PLAN**

**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 and support activities
- Promotion and marketing efforts
- Online registration ETF expenses
- Attendance and conferences/events
- Marketing and promotion activities for PBD programs

**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.

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**Recommendations:**

Continue basically as-is

Continue with the following modifications:

Discontinue

Coordinate all education program marketing into this business plan; Enhance use of targeted facebook ads

**Measurable objectives:**

<b>Measurable objectives</b>	
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.	
Participate in local association and firm events, where available, to promote AAR's educational programs and resources.	
Develop or strengthen program messages where needed to connect the program benefit to members' success/transaction solutions.	
Develop easy to follow paths to earn the rCRMS, CRPM and GRI using infographic format.	
Print and distribute collateral at AAR and/or local events.	
Work through appropriate committees to influence ADRE to permit C/E Credit for business-skill related topics.	
Review and re-energize (if appropriate) 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.	
Distribute a monthly calendar for AAR's education and events and monitor it's open/action rates.	
Provide resources for staff attendance at AAR, NAR and Education-related conferences/forums.	
Market AAR's education and events through targeted eblasts, social media and invitation videos and monitor the open/action rates (3 touch approach).	

Provide marketing collateral to AAR's education partners to use in marketing AARs education programs.	
Monitor program marketing efforts/results and utilize in targeting.	
Identify and monitor student demographics for each of AAR's education programs: GRI, rCRMS, CRPM and c/e student and utilize in target marketing efforts.	

<b>ARIZONA REALTORS® Business Services &amp; Technology</b> <b>2019 Business Plan</b>
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**From:** Business Services and Technology  
**Chair:** Aaron Pfeifer  
**Staff Liaison:** Nick Catanesi

**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**

ARIZONA REALTORS® provides technology tools other than forms delivery as a member benefit only if ARIZONA REALTORS® 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 ARIZONA REALTORS®' vision. ARIZONA REALTORS® explores, identifies and recruits members who are technologically adept to enhance the goals of the committee. (Strategic Objectives 5.B and 5.F)

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®'s vision:** ARIZONA REALTORS®'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:** Indicate which focus point is addressed by the PPSA.

1. The Arizona REALTORS® 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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**Strategic Focus Points:**

Measurable Objectives	Status
Negotiate discounts for products and services that benefit members and consistently market those offerings.	
Market for member awareness and increased use	
Pursue partnership and collaboration opportunities to the members how to use business technologies.	

Research and inform members on how to choose the right technologies for business through channels of communication.	
Create a mechanism for consistent member generated content regarding technology related issues and practices.	
Research and inform members on how to choose the right technologies for business through multiple channels of communication.	

**Recommendations:**

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

**Tech Helpline®**

ARIZONA REALTORS® provides technology tools, other than forms delivery, as a member benefit only if: ARIZONA REALTORS® is in a unique position to provide the tool; the tool creates value statewide; or the tool advances the real estate industry and the ARIZONA REALTORS® vision. ARIZONA REALTORS® investigates and provides information on member or staff recommended products and services that increase efficiency, profitability and digital security of member business operations. ARIZONA REALTORS® negotiates discounts for products and services that benefit members. (Strategic Objectives 5.B, 5.C and 5.D)

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®’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:** Indicate which focus point is addressed by the PPSA.

- 1. The Arizona REALTORS® 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. The Arizona REALTORS® 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.
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- 6. The Arizona REALTORS® 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 Focus Points:**

Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	



Market for member awareness and increased use	
Pursue partnership and collaboration opportunities to the members how to use business technologies.	
Maintain positive member responses	

**Recommendations:**

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

**zipForm®**

ARIZONA REALTORS® controls and provides the delivery of ARIZONA REALTORS®’s forms to the members as a member benefit. ARIZONA REALTORS® negotiates discounts for products and services that benefit members. (Strategic Objectives 5.A and 5.D)

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®’s vision:** zipForm® controls the delivery of ARIZONA REALTORS®’s forms and provides the delivery of ARIZONA REALTORS®’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 ARIZONA REALTORS®.

**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. The Arizona REALTORS® 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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**Strategic Focus Points:**

Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	
Conduct trainings on a monthly/bi-weekly basis	
Pursue partnership and collaboration opportunities to the members how to use business technologies.	
Maintain positive member responses	

**Recommendations:**

- Continue basically as-is

\_\_\_\_\_ Continue with the following modifications

\_\_\_\_\_ Discontinue

### **ARIZONA REALTORS® eSign**

ARIZONA REALTORS® provides technology tools, other than forms delivery, as a member benefit only if: ARIZONA REALTORS® is in a unique position to provide the tool; the tool creates value statewide; or the tool advances the real estate industry and the ARIZONA REALTORS® vision. ARIZONA REALTORS® investigates and provides information on member or staff recommended products and services that increase efficiency, profitability and digital security of member business operations. ARIZONA REALTORS® negotiates discounts for products and services that benefit members. (Strategic Objective 5.B, 5.C and 5.D)

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

**Importance of PPSA to the critical-to-serve customer:** ARIZONA REALTORS® eSign 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. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.

\_\_\_ 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.

X 3. The Arizona REALTORS® provides members unsurpassed risk management tools.

\_\_\_ 4. The Arizona REALTORS® 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. The Arizona REALTORS® supports the success of REALTOR® members with business services.

\_\_\_ 6. The Arizona REALTORS® 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 Focus Points:**

<b>Measurable Objectives</b>	<b>Status</b>
Usage statistics are compiled and shared monthly.	
Conduct trainings on a monthly/bi-weekly basis	
Pursue partnership and collaboration opportunities to the members how to use business technologies.	
Maintain positive member responses	

**Recommendations:**

X Continue basically as-is

\_\_\_\_\_ Continue with the following modifications

\_\_\_\_\_ Discontinue

## **ARIZONA REALTORS® Single Sign-On**

ARIZONA REALTORS® provides technology tools, other than forms delivery, as a member benefit only if: ARIZONA REALTORS® is in a unique position to provide the tool; the tool creates value statewide; or the tool advances the real estate industry and the ARIZONA REALTORS® vision. ARIZONA REALTORS® investigates and provides information on member or staff recommended products and services that increase efficiency, profitability and digital security of member business operations. ARIZONA REALTORS® negotiates discounts for products and services that benefit members. (Strategic Objectives 5.B, 5.C and 5.D)

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®'s vision:** ARIZONA REALTORS® Single Sign-On provides members with a technology tool through ARIZONA REALTORS®'s unique position to provide the tool. ARIZONA REALTORS® eSign creates value statewide and advances the real estate industry.

**Importance of PPSA to the critical-to-serve customer:** ARIZONA REALTORS® Single Sign-On 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. The Arizona REALTORS® 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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**Strategic Focus Points:**

<b>Measurable Objectives</b>	<b>Status</b>
Usage statistics are compiled and shared monthly.	
Conduct trainings on a monthly/bi-weekly basis	
Pursue partnership and collaboration opportunities to the members how to use business technologies.	
Maintain positive member responses	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue

# **SOFTWARE DEVELOPMENT**

ARIZONA REALTORS® will develop and monitor software that will help ARIZONA REALTORS® maintain data to better understand member needs, communicate more effectively with members and maximize adoption of ARIZONA REALTORS® programs and services.

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®'s vision:** ARIZONA REALTORS®'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 ARIZONA REALTORS® allow members to work effectively and efficiently.

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

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**Strategic Focus Points:**

Measurable Objectives	Status
Develop and maintain data and access to data for ARIZONA REALTORS® purposes.	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue

## **Enhanced Member Profile**

ARIZONA REALTORS® develops and maintains data, beginning with an enhanced member profile, to better understand member needs, communicate more effectively with members and maximize adoption of ARIZONA REALTORS® programs and services (SP: 5.E).

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®'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. The Arizona REALTORS® 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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**Strategic Focus Points:**

Measurable Objectives	Status
Provide data analytics of ARIZONA REALTORS®Online.com members logged-in.	
Develop “Enhanced Member Profile” through RAMCO AMS.	
Maintain RAMCO as the data warehouse for the Enhanced Member Profile	

**Recommendations:**

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

## **IT RESOURCES AND SECURITY MANAGEMENT**

ARIZONA REALTORS® will develop and monitor software that will help members’ access to ARIZONA REALTORS®’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 ARIZONA REALTORS® programs and services (SP: 5.E).

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®’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.

- 1. The Arizona REALTORS® 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. The Arizona REALTORS® 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. The Arizona REALTORS® supports the success of REALTOR® members with business services.
- 6. The Arizona REALTORS® 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 Focus Points:**

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

**Recommendations:**

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

**Phone**

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

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

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
- 3. The Arizona REALTORS® provides members unsurpassed risk management tools.
- 4. The Arizona REALTORS® 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. The Arizona REALTORS® supports the success of REALTOR® members with business services.

6. The Arizona REALTORS® 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 Focus Points:**

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.	

**Recommendations:**

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

**Network**

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

**Brief description of how the PPSA contributes to achieving ARIZONA REALTORS®’s vision:** Provide resources which support the entire network and infrastructure of the association. A major part of this is securing ARIZONA REALTORS®’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 ARIZONA REALTORS®’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 ARIZONA REALTORS®.

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

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
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- 5. The Arizona REALTORS® supports the success of REALTOR® members with business services.
- 6. The Arizona REALTORS® 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 Focus Points:**

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	

**Recommendations:**

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

**BUSINESS SERVICES AND TECHNOLOGY SUPPORT**

ARIZONA REALTORS®’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 ARIZONA REALTORS®’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.

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
- 3. The Arizona REALTORS® provides members unsurpassed risk management tools.
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**Strategic Focus Points:**

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

**Recommendations:**

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

**MEMBER COMMUNICATIONS**

ARIZONA REALTORS® 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 ARIZONA REALTORS®'s efforts to inform, engage and reach out to the membership.

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

- 1. The Arizona REALTORS® is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision.
- 2. The Arizona REALTORS® is the most powerful and influential political force in Arizona.
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**Strategic Focus Points:**

<b>Measurable Objectives</b>	<b>Status</b>
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 ARIZONA REALTORS® brand and is member centric and speaks to ARIZONA REALTORS®'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 ARIZONA REALTORS® 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.	
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.	
Investigate strategies for member communications via the Single Sign-On platform using pop-up messaging based on criteria from the enhanced member profile data within RAMCO	

**Recommendations:**

Continue basically as-is

Continue with the following modifications

Discontinue