



## **2019 Strategic Plan**

**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:**

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**Date**

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**President's signature**

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**Date**

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**President-Elect's signature**

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