

Arizona REALTORS®
OPERATIONS AND STRATEGIC INITIATIVES
2020 Business Plan

FROM: Operations & Strategic Initiatives
Chair: Eric Gibbs, Treasurer
Staff Liaison: K. Michelle Lind, Esq., CEO
DATE: _____ 2020

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

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

CURRENT TOP PRIORITIES

-

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. 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® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.
- 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 Objectives	Status
Determine real estate firm representatives for 2021 Board of Directors based on 12/31/19 membership numbers.	

Establish recommendations for allocation of surplus from 2019 operating budget for Board of Directors approval.	
Begin 2021 officer election process. Announce deadline and application submission dates. Submit 2021 candidate statements for Board of Directors 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"> ● ___ % - March meeting ● ___ % - October meeting

Recommendation:

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

EXECUTIVE COMMITTEE

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Measurable Objectives	Status
Assist leadership engagement with local association leadership to strengthen the strategic partnership.	

Assist President-elect and First Vice President with selecting primary committee chairs, vice chairs and association executive representative for 2021 to be approved by Executive Committee in January and Board of Directors at the March meeting.	
Assist President-elect in identifying members, scheduling and organizing planning session for 2021. 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.	
Develop and deliver monthly “talking points” on association activities to association Region Vice Presidents and leadership.	
Develop more structures tools and procedures for Region Vice Presidents’ communications and reports.	
Continue to proactively research and review options for a member Association Health Plan.	
Continue to review options for retirement/financial planning tools for members.	
Operate in compliance with bylaws, policies and applicable laws.	
Communicate upcoming meeting times and agendas effectively.	
Evaluate and/or approve funds and agreements for innovative programs, products and/or services as submitted.	
Draft, update and distribute meeting agendas and materials for Executive Committee meetings in January, March, June, September and October in a timely manner.	
Maintain at least 80% attendance by committee members.	<ul style="list-style-type: none"> ● ___ % - January meeting ● ___ % - March meeting. ● ___% - June meeting ● ___% - 2019 Budget meeting ● ___% - October meeting

Recommendation:

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

ASSOCIATION RELATIONS

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

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Measurable Objectives	Status
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 association executives Workshop.	
Deliver timely information and updates to local association executives on Arizona REALTORS® activities.	
Coordinate with local associations regarding NAR's Association Executive Institute.	
Figure 2021 director entitlements for local associations using 12/31/19 membership report.	
Determine which Arizona association executives are eligible to serve on 2021 Board of Directors.	
Provide local associations with orientation resources to include Arizona REALTORS® as needed.	
Increase the number of opportunities for local association executives to meet and network.	
Provide tools and be a resource to local associations to help communicate their relevance to members and encourage communication and collaboration between associations and Multiple Listing Services 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 Arizona Department of Real Estate.	
Arizona REALTORS® cultivates strategic alliances and partners with Multiple Listing Services, institutes, societies, councils, and other homeownership entities on endeavors that benefit the membership. (CCIM/IREM, VAREP)	
Maintain Multiple Listing Service regional consolidation resources for local associations.	
Influence members to utilize REALTOR® brands (products and services).	

Recommendation:

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CONSUMER OUTREACH

The Arizona REALTORS® will demonstrate engagement in not less than four meaningful consumer engagement activities annually.

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Measurable Objectives	Status
Respond to media requests for interviews and information.	<input type="checkbox"/> earned media spots between <input type="checkbox"/> and <input type="checkbox"/> See: www.aaronline.com/press/
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®.

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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
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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®.

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Measurable Objectives	Status
Remain active in all NAR Region 11 activities (Caucus, Nominating Committee, and Strategic Planning Committee).	
Assist in coordinating and attending Region 11 Conference.	

Recommendation:

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

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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 Executive Committee consideration.	
Monitor: <ul style="list-style-type: none"> • Capital Reserve fund account balances • Operating and Strategic Initiative Reserve accounts • RAPAC and Issues Mobilization accounts 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 Executive Committee approval.	
Assist with the annual audits (Arizona REALTORS®, ARDAF, ARFHCO, RAPAC).	
Prepare and finalize 2021 Operating and Capital budget with the 2021 Executive Committee and Board of Directors.	

Recommendation:

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

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

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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 2021 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.

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Measurable Objectives	Status
Analyze personnel/overhead needs based on the Association’s business plans.	
Retain a well-trained, capable staff.	
Maintain positive staff response to member needs.	
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 Employer Assisted Housing program to state and local association employees.

Measurable Objectives	Status
Promote awareness and utility of financial literacy education in Arizona high schools.	
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

Arizona REALTORS®
LEGISLATIVE AND POLITICAL AFFAIRS
2020 Business Plan

Committee: Legislative and Political Affairs
Chair: Shelly Ostrowski
Staff Liaison: Nicole LaSlavic
DATE:

REALTOR®... the best prepared real estate practitioner 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

Governmental Area Support - 1501

The Arizona REALTORS® 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®.

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Measurable Objective	Target Date	Status
Assign tasks to all governmental area work groups within approved budget parameters	12/20	
Continue with a "Thank You" lunch for each of the four government affairs committees.	Annually	

Recommendations:

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

Discontinue

- **The “Thank You” lunches have been implemented with success and should be changed to reflect the continuation.**

Legislative Advocacy - 1510

The Arizona REALTORS® 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®. Arizona REALTORS® advocates and capitalizes on the REALTOR® Party. Arizona REALTORS® leverages and maintains influential relationships.

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Measurable Objective	Target Date	Status
Activate broad-based Arizona REALTORS® membership representation in lobbying activities through legislative committee appointments and related committee activities	12/20	
Encourage application to state boards and commissions	12/20	
Strengthen and maintain relationships with Arizona statewide officeholders and agency department heads	12/20	
Strengthen and maintain relationships with housing industry partners through ongoing communications	12/20	
Achieve an 85% success rate on Arizona REALTORS® legislative policy priorities.	6/20	
Conduct daily monitoring of legislation and recommend positions to the Legislative Committee in conjunction with the approved Legislative Policy Statements	6/20	
Monitor member involvement in political campaigns	12/20	
Finalize 2020 legislative policies list by October 2019	10/20	

Evaluate state-level candidates on Arizona REALTORS® legislative policies and voting record to receive funds	8/20	
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Recommendations:

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

- Update measurable objective related to finalization of legislative policies for proper grammar.

Local Lobbying Support - 1545

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

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Measurable Objective	Target Date	Status
Assist local associations in their lobbying efforts as issues arise	12/20	
Encouraged local associations to establish an advocacy program and provide assistance as requested	12/20	
Increase visibility and assistance from the REALTOR® Party Director for local issues support	12/20	

Recommendations:

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

- Increase visibility and assistance from the REALTOR® Party Director for local issues support.

Legislative Policy Development - 1550

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

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Measurable Objective	Target Date	Status
Poll members for their opinions through use of formal and informal methods	12/20	
Continue to involve stakeholders on real estate related issues	12/20	
Encourage proportional regional representation at the REALTOR® Caucus	9/20	
Forward all legislative recommendations to the Legislative and Political Affairs Committee for review and appropriate action	9/20	
Host 2020 REALTOR® Day Luncheon	1/20	
Identify for participation in or host a second legislator event	12/20	
Achieve attendance of 65% of legislators at legislative events	6/20	
Identify attendees for legislative events through political involvement and leadership activity	12/20	

Recommendations:

- Continue basically as-is
- Continue with the following modifications
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Fundraising/Grassroots Support - 1560

The Arizona REALTORS® proactively advocates and protects private property rights and real property ownership. Arizona REALTORS® articulates NAR’s and/or the Arizona REALTORS® legislative/political successes to members with emphasis on how it affects their day-to-day business. Arizona REALTORS® advocates and capitalizes on the REALTOR® Party. Arizona REALTORS® provides resources to members to help them understand the value of RAPAC and educates and encourages members to share the value of RAPAC. Arizona REALTORS® leverages and maintains influential relationships. Arizona REALTORS® serves as a resource for local

associations to take advantage of REALTOR® Party opportunities. Arizona REALTORS® strives to achieve NAR RPAC fundraising goals and Calls for Action participation rates.

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Measurable Objective	Target Date	Status
Finalize the political activities fundraising plan by December 31st by the previous plan year	12/20	
Identify members to participate in the annual REALTOR® Party training	6/20	
Provide fundraising tips, tools and promotional materials for local associations	9/20	
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	10/20	
Utilize the NAR RAPAC Grant stipend for promotion of RAPAC	12/20	
Utilize the Major Investor Program NAR stipend to host an Arizona REALTORS® Major Investor Event	12/20	
Achieve participation of local associations in Major Investor Events	12/20	
Achieve 100% level of RAPAC participation from state and NAR directors, AEs, Presidents, Presidents-elect, RVPs, RIMC, LPAC, Legislative Committee, RAPAC Trustees, FPCs, EXCOM, BOD, and local RAPAC Chairs	12/20	
Achieve 100% or NAR Major Investor Goal for 2020. Benchmarks: 50% of goal by April; 75% of goal by June; 100% by September 30.	12/20	
Recognize Major Investors with gift	12/20	

Recognize President Circle members with gift	12/20	
Recognize Hall of Fame members with gift	12/20	
Communicate state and federal election law requirements to local associations in order for RAPAC to remain in compliance at the state and federal level	12/20	
Host a fundraising event at the Spring Conference/Convention	4/20	
Secure a vendor for conducting online fundraising auctions	4/20	
Host a fundraising event at the Leadership Conference	10/20	
Recognize RAPAC Major Investors on aaronline.com	Monthly	
Recognize RAPAC Major Investors with special recognition at Capitol Day	1/20	
Recognize RAPAC Major Investors with special recognition at REALTOR® Caucus	9/20	
Plan and host a 2-day, 1-night Major Investor Motorcycle, Convertible, and Classic Car Rally Ride road trip.	10/8	
Maintain Leadership Appreciation Program to connect Arizona REALTORS® leaders with Major Investors for recognition of investment	12/20	
Increase use of NAR grant programs by 50% over 2019 utilization by local associations	12/20	
Utilize REALTOR® Party Plus fundraising analytics and predictive models to identify likely and high dollar donors for use in achieving RAPAC goal	12/20	

Recommendations:

Continue basically as-is

Continue with the following modifications

Discontinue

- Add FPCs to the list of groups that are expected to reach 100% RAPAC participation.
- Add Hall of Fame members to the list of individuals that receive a recognition gift for their investment.
- Changed Placemaking and Smartgrowth grants to NAR grant programs which casts a wider net and allows for flexibility when NAR changes one of their programs.
- Add online auction vendor to increase the reach of the annual silent auction as well as reduce the opportunity for members to engage in improprieties in the closing stages of the auction, improving the overall user experience. Add RAPAC Rally Ride Planning and execution to continue forming a strong comradery among our state's Major Investors.

Federal Liaison Support - 1575

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Measurable Objective	Target Date	Status
Communicate quarterly with NAR political staff and FPC's on federal issues and the positions taken by each Arizona Member of Congress to enhance our FPC efforts while at Washington, D.C. meetings and throughout the year	Quarterly	
Register all FPCs with NAR's REALTOR® Action Center	1/20	
Oversee the FPCs quality contact with their representative or their staff within D.C. or Arizona, ensuring attendance at required meetings, training sessions and fundraisers	Quarterly	
Ensure FPCs attend required Mid-Year meetings	5/20	
Ensure compliance that all FPCs attend required NAR training session on their roles and responsibilities	2/20	
Oversee that each FPC team will hold one meeting locally or attend a fundraiser with their congressman/senator or their staff during the year	12/20	
Maintain strong communication with Congressional staff through ongoing contacts on issues important to Arizona	12/20	
Attendance at meetings with Members of Congress during the NAR Mid-Year Hill Visits is by invitation only	5/20	
Ensure compliance that FPCs meet any NAR requirements	12/20	

Establish a Hill Visit Reception for all Arizona members who attend NAR Mid-Year and invite each MOC	5/20	
Establish funds for FPC in-district meetings/receptions	12/20	

Recommendations:

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

- Establish a Hill Visit Reception for all Arizona members who attend NAR mid-year and invite each Member of Congress.
- Establish funds for FPC in-district meetings/receptions.

Election Year Activities - 1580

The Arizona REALTORS® is the most powerful and influential political force in Arizona. Arizona REALTORS® 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.
 3. The Arizona REALTORS® provides members unsurpassed risk management tools.
 4. The Arizona REALTORS® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.
 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 Objective	Target Date	Status
Encourage members to register to vote	12/20	
Establish protocol for a “Get Out the Vote” campaign for use in 2020 election cycle	11/20	
Create and distribute Voter Guides with information on REALTOR® endorsed candidates, with special focus on how and why they are REALTOR® Champions.	8/20	
Tie endorsed candidates into the REALTOR® Party for full circle education of the importance of legislative work and protections offered by the REALTOR® Party.		

Recommendations:

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

- Create and distribute Voter Guides with information on the REALTOR® endorsed candidates with a special focus on how and why they are REALTOR® Champions. Education effort to help the member understand the full picture and the impact of the REALTOR® Party on their business and the influence the REALTOR® Party has on the elections and legislative activities.
- Tie endorsed candidates into REALTOR® Party for full circle education on the importance of legislative work and protections offered by the REALTOR® Party.

Governmental Communications - 1585

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

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.

Measurable Objective	Target Date	Status
Provide REALTOR® Party updates and legislative updates to the Business Services and Technology Department for use in the REALTOR® Voice, Arizona REALTORS® blog and alternative forms of media distribution.	12/20	
Produce REALTOR® Party video annually with focus on legislative successes and what that means for their industry/ business/ clients.	4/20	
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	12/20	

Utilize digital advertising and technologies to push federal CFAs to members	As Required	
Maintain current information on each governmental program at aaronline.com	12/20	
Communicate with Big Yam for press releases when large successes occur, or the consumer needs to be educated on the associations wins	12/20	
Communicate how Issues Mobilization and RAPAC reserves can enhance local association political objectives	12/20	
Communicate the importance of the Arizona REALTORS® legislative/political successes to members	12/20	
Continue to communicate the mechanism by which members can relay, on a year-round basis, legislative comments and proposals	12/20	
Utilize the broker involvement program/stipend to enroll local brokers for participation in NAR's BIP to increase response rates to calls for action	12/20	
Work with REALTOR® Party Plus to identify a predictive model to target members for increased activism on legislative issues and advocacy initiatives	12/20	
Implement the use of geofencing, beacon and direct one-to-one digital advertising technologies for concentrated message delivery during a Call for Action	As Required	

Recommendations:

Continue basically as-is

Continue with the following modifications

Discontinue

- .
- Update Communications and Technology Department to Business Services and Technology Department to reflect accurate department name.
- Implement the use of geofencing when needed during a Call for Action from explore, as it has been used before with success.
Modify Broker Involvement Program objectives to reflect NAR's interests in the program.

Political Research - 1596

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

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

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Measurable Objective	Target Date	Status
Conduct research as needed	12/20	
Work with REALTOR® Party Plus to utilize predictive models to obtain comprehensive analysis of membership as well as election data	12/20	

Recommendations:

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

Arizona REALTORS®
RISK MANAGEMENT COMMITTEE
2020 Business Plan

FROM: Risk Management Committee (RMC)
Chairman: Jim Durham
Vice Chairman: Laurie McDonnell
RMC Liaison: Scott M. Drucker
DATE: January 1, 2020

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

The following are programs, products, services and activities (PPSA's) with Risk Management Committee oversight.

CURRENT TOP PRIORITIES

•

RECOMMENDATIONS

•

GROUPS FORMED

•

PROFESSIONAL STANDARDS

Professional Standards is what sets REALTORS® apart from other licensees and is a real solution to enforcing the highest standards. Professional Standards is of critical importance to those aspiring to the Arizona REALTORS® Purpose.

PROFESSIONAL STANDARDS ADMINISTRATION

This program processes 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**

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

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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 Objectives	Status
GVC: Prompt review of complaints	
PSC: Complete ethics cases promptly	
PSC: Complete arbitrations promptly	
Update PS policy adaptations as necessary	
Reinforce, on a continuing basis PS benefits and results.	
Implement procedures to expedite the hearing process and evaluate whether additional resources are needed to accomplish this.	
Educate members about the PS enforcement process.	

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. The mediation program is a real solution for members involved in a dispute. Early dispute resolution is of critical importance to those aspiring to the Arizona REALTORS® Purpose.

Measurable Objectives	Status
Facilitate mediation requests on a timely basis	
Receive positive feedback from mediation evaluations	
Maintain list of qualified mediators	
Update mediation policies and procedures as necessary	

Recommendations:

- 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. The Ombudsman Program is a real solution for the public when members are involved in a dispute or miscommunication. Early dispute resolution is of critical importance to those aspiring to the Arizona REALTORS® Purpose.

Measurable Objectives	Status
Facilitate ombudsman requests on a timely basis	
Receive positive feedback from ombudsman evaluations	
Maintain list of qualified ombudsmen	
Update PS policy adaptations as necessary	

Recommendations:

- 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. Professional Standards is a real solution for members and is critical to achieving the highest standards. Professional Standards, Mediation and Ombudsman training is of critical importance to those aspiring to the Arizona REALTORS® Purpose.

Measurable Objectives	Status
Offer PS Training for GVC and PS Committee	
PS Policy & Training Workgroup meeting	
Offer Mediator training	
Offer Ombudsman training	
Offer hearing panel chair training	
Publish PS, Mediation and Ombudsman information	
PS outreach to members	

Recommendations:

- 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. 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. Providing buyers and sellers with a way to resolve their disputes is pivotal to our members’ real estate practice.

Measurable Objectives	Status
Offer an effective Buyer-Seller Dispute Resolution program.	
Recruit effective Buyer-Seller Dispute Resolution providers.	
Ensure compliance of Buyer-Seller Dispute providers with program’s directives.	
Receive positive feedback from Buyer-Seller Dispute Resolution program evaluations.	

Recommendations:

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

RISK MANAGEMENT

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. The contracts, addenda and related forms are critical to our members’ real estate practice.

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.

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

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Measurable Objectives	Status
Workgroups formed as necessary.	
Protect our forms copyright.	
Forms drafted or revised for introduction in February, June and October.	
Deliver timely forms information/education.	
Promote and update the educational tool kit for teams and brokers on best practices and guidelines for management of teams.	
Promote and update a webpage that includes safety education, incident recordation and contemporaneous incident notification via a REALTOR® text alert system (ASAP).	
Direct agents to their brokers and aaronline.com for relevant risk management resources.	

Recommendations:

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

LEGAL HOTLINE

The Hotline is a real solution to provide needed guidance to members on specific situations or transactions. Timely legal guidance is crucial to the members. 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

Measurable Objectives	Status
Promote Hotline usage.	
Hotline to prepare ten Q&As on current issues/current “hot topics” six times per year for the Arizona REALTOR® Voice and the Arizona REALTORS® website.	
Hotline to maintain statistics on number and types of calls in cooperation with the Arizona REALTORS® staff.	

Hotline attorney to attend the Arizona REALTORS® Risk Management Committee or Workgroup meetings as requested.	
Hotline attorney to review new or revised Arizona REALTORS® forms and notify the Arizona REALTORS® of any legal concerns or recommendations.	
Hotline attorney to consult with the Arizona REALTORS® General Counsel on legal issues as requested.	
Evaluate Hotline program by surveying members.	
Form Hotline Workgroup to evaluate program.	

Recommendations:

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

INDUSTRY ISSUES

This program involves addressing current industry issues. Addressing industry issues as they arise is a real solution to provide needed guidance to members on specific situations or transactions. Guidance on industry issues as they arise is crucial to the members.

Measurable Objectives	Status
Maintain claims statistics to identify liability trends.	
Foster alliances with defense attorneys and E&O carriers and mediators.	
Monitor marijuana legal conflicts, solar, marketing service agreements, and comfort animals - Keep members informed as these issues evolve.	
Educate agents on potential ethical and legal liabilities associated with off-market listings, fix and flips and REALTOR® as principal transactions.	
Share with agents the dangers posed by social media.	
Increase promotion and education of federal regulatory changes and enforcement; respond to changes and monitor.	
Monitor cyber-fraud and cyber-security issues and keep members informed of risks, as well as policies and procedures members can implement to mitigate those risks.	
Monitor the Americans with Disabilities Act website accessibility issues and keep members informed as the issue evolves.	
Collaborate with local associations, regional vice presidents and multiple listing services to identify risk management needs for members, associations and regions.	

Recommendations:

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

LEGAL & INDUSTRY PUBLICATIONS

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. Current, accurate, and timely legal, legislative and risk management updates and information are of critical importance to our members. 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

Measurable Objectives	Status
Distribution of time sensitive legal and risk management information and articles.	
Deliver Arizona Broker/Manager Quarterly.	
Maintain advisories as necessary: Buyer Advisory, Short Sale Seller Advisory, Lease Owners Advisory, Tenant Advisory.	
Maintain and update legal, risk management, fair housing, and international real estate content on the Arizona REALTORS® website and in publications, as necessary.	
Promote and continue to develop resources that assist brokers in operating a brokerage that is of value to the public, agents, and the real estate industry (i.e. risk management, legal hotline, etc.)	
Direct agents to their brokers.	
Direct members to aaronline.com for relevant risk management resources.	

Recommendations:

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

LEGAL AND LEGISLATIVE OUTREACH AND EDUCATION

This plan provides a real solution for delivering timely Arizona-specific legal, legislative, and risk management information and education to members. 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. 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.

Measurable Objectives	Status
Participation in legal and legislative programs.	

Recommendations:

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

LEGISLATIVE SUPPORT

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. Protecting members’ legislative interests is key to allowing members the ability to achieve the Arizona REALTORS® Purpose. 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.

Measurable Objectives	Status
Successful outcome in legislation supported and successful defeat of legislation opposed.	
Promote laws (legislative and case law), regulations, and standards of practice that reduce member liability.	

Recommendations:

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

REGULATORY ISSUES

Representation on regulatory issues that affect the Arizona REALTORS® members’ livelihood and success is a real solution for members achieving the Arizona REALTORS® Purpose. Protecting the Arizona REALTORS® and its members’ regulatory interests are fundamental to allowing members the ability to achieve the Arizona REALTORS® Purpose. 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.

Measurable Objectives	Status
Negotiation of reasonable regulatory rules and policies that are acceptable to the Arizona REALTORS® members and do not hinder their success.	
Maintain contact with ADRE Advisory Board.	

Recommendations:

- Continue basically as-is

- Continue with the following modifications
- Discontinue

GENERAL PROGRAMS

SUPPORT

Provide critical support to accomplish the goals of this Committee’s programs and services. The support services and resources allow the committee to provide the Arizona REALTORS® Members with the most up-to-date information on Professional Standards, legal, legislative, regulatory and industry issues. 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

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

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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.

Measurable Objectives	Status
All tasks assigned by the Committee are completed, updates and information provided to members after Professional Standards, continuing legal education class or industry meetings. General printing/postage/supply funds provide the tools to accomplish the area’s PPSAs.	

Recommendations:

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

RELATED ACTIVITIES WITHOUT DIRECT COMMITTEE OVERSIGHT

LEGAL COUNSEL

A real solution to leadership, CEO, committees, and local associations in developing programs with legal implications and effectively leading the association. Allows the association to provide programs to assist members to be the best prepared with the highest standards. This program includes:

- 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

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

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

Recommendations:

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

LITIGATION SUPPORT

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. Protecting the Arizona REALTORS® and its members’ legal interests are key to allowing members the ability to achieve the Arizona REALTORS® Purpose. 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

Measurable Objectives	Status
Successful outcome in litigation and dispute resolution.	

Recommendations:

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

**Arizona REALTORS®
Professional and Business Development
2020 Business Plan**

From: Professional and Business Development (PBD) Committee
Chair: Marci Slater
Staff Liaison: Barb Freestone
Date: 2020

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

The following are programs, products, services and activities (PPSA's) with Professional and Business Development oversight.

CURRENT TOP PRIORITIES

•

RECOMMENDATIONS

•

GROUPS FORMED

•

BROKER UNIVERSITY

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 the Arizona REALTORS® 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.

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

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

X 4. The Arizona REALTORS® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.

___ 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 Objectives	Status
Offer a small broker, medium broker and large broker forum	
Communicate programs or information to the brokerage community that focus on operational issues and available resources	
Maintain an 80% student satisfaction in all classes.	
Provide information quarterly to brokers about Arizona REALTORS education programs and resources available to their agents.	
Offer a minimum of two Broker Management Clinics that incorporate practical based content.	
Produce and distribute webinars focusing on issues important to brokers as needed.	
Identify content and structure for a Broker Tab on AARonline.com and work with Risk Management and BS&T to implement	
Continue to produce and distribute Mack In A Minute videos series and Contract Conversation video series.	

Recommendation:

___ Continue basically as-is

X Continue with the following modifications: replaced the annual broker summit with a small, medium and large broker forum; develop a broker tab for AARonline.com and work with Risk Management and BS&T areas to implement.

___ Discontinue

rCRMS (Certified Risk Management Specialist)

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 the Arizona REALTORS® members.

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

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Measurable Objectives	Status
Offer 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 Arizona REALTORS® 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.	
Maintain an 80% student satisfaction in all classes.	
Recognize newly certified members on the Arizona REALTORS® Facebook page and announced to local associations.	

Recommendation:

Continue basically as-is

Continue with the following modifications:

Discontinue

EDUCATION OUTREACH

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.

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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 Objectives	Status
Maintain and grow a cadre of qualified instructors who meet the Arizona REALTORS® adopted Instructor Standards.	
Offer, through partnership and revenue share opportunities with local associations and brokerages, c/e, designation and certification courses, delivered live and live streamed.	
Maintain an 80% student satisfaction in all classes.	
Assist partners in marketing AAR-sponsored education classes.	
Provide local associations with an annual education reference guide.	
Deliver an Annual program featuring national speakers for changing trends and business practices in the industry.	
Monitor and engage, when feasible, in opportunities or partnerships to provide	

new agent resources/training opportunities.	
Offer an annual Education Workshop for local association education staff/chairs.	

Recommendation:

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

EDUCATION DEVELOPMENT

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.

- 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® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.
- 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 Objectives	Status
Maintain and update learning management platform license.	
Monitor and enhance live streaming platform to ensure it provides an effective learning experience.	
Continue to investigate and implement new education platforms that allow us to reach our members as well as engage them interactively in a learning environment.	

Curriculum development and delivery resources are available to develop quality programs.	
All course curricula include practical experience and student engagement and shall be learner-focused.	
Produce a minimum of 3 Contract Conversation videos.	

Recommendation:

Continue basically as-is

Continue with the following modifications: Present an Instructor Forum; create an incentive program for instructors to continue to elevate their skills

Discontinue

INSTRUCTOR DEVELOPMENT

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

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

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Measurable Objectives	Status
Provide a minimum of one Instructor Development Workshop. focusing on modern teaching techniques that adapt to the modern learner.	

Offer an Instructor Forum to give Arizona REALTORS instructors an opportunity to network and share teaching strategies, engagement activities and technology tools with each other.	
Develop and offer incentives for instructors to participate and engage in AAR approved/sponsored activities/programs focused on elevated instructor practices.	
Provide training and resources to instructors who teach the association's live streaming classes.	
Monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	
Encourage instructors to promote C2EX information in all AAR sponsored classes.	
Provide one scholarship to the Bob Pike "Train the Trainer" for one new Arizona REALTORS® instructor who would benefit from the program.	

Recommendation:

Continue basically as-is

Continue with the following modifications: offer an Instructor Forum for brainstorming and sharing; offer training programs through industry webinars; develop incentives for instructors to participate in AAR sponsored training programs

Discontinue

INDUSTRY PARTNERS CONFERENCE

This plan affords the Arizona REALTORS® an opportunity to partner with the Arizona Mortgage Lenders Association and Arizona State Escrow Association to offer a one-day program bringing REALTORS®, lenders and escrow reps together to learn from each other.

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

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Measurable Objectives	Status
Participate as a partner with the Arizona Mortgage Lenders Association and Arizona State Escrow Association, to offer a program designed to help members understand each other's role in the real estate transaction.	

Recommendation:

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

LEADERSHIP TRAINING & DEVELOPMENT

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

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

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Measurable Objectives	Status
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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 provide opportunities to enhance leadership skills and pathway to Leadership.	
Provide resources addressing “how to be a leader – where do I start?”	

Recommendation:

Continue basically as-is

Continue with the following modifications: Provide resources addressing “how to be a leader-where do I start”

Discontinue

MRES SOCIETY

This plan provides a recognition and marketing vehicle for members to assist in positioning themselves as trusted, knowledgeable and skilled professionals as well as growth resources for new agents who strive to succeed.

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

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Measurable Objectives	Status
Recognize members’ life-long 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%.	
Monitor and promote NAR's Commitment to Excellence program.	
Annual survey to MRES members to evaluate membership value.	
Co-host an annual webinar week with the GRI program to provide a special educational webinar week.	

Recommendation:

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

PROPERTY MANAGEMENT CERTIFICATION

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 the Arizona REALTORS® members.

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

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Measurable Objectives	Status
Offer <u>CRPM classes</u> at a competitive and affordable fee through partnership with local associations, firms and NARPM.	

Maintain a cadre of qualified instructors who meet the Arizona REALTORS® adopted Instructor Standards and bring practical experience to the program.	
Maintain an 80% student satisfaction in all classes.	
Offer 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.	

Recommendation:

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

REALTOR® INSTITUTE: GRI DESIGNATION

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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Measurable Objectives	Status
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The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	
Co-host an annual webinar week with the MRES Society program to provide a special educational webinar week.	
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, the Arizona REALTORS® instructor standards and embrace learner-centered teaching styles.	
Update and maintain the Online Business Planning course.	
Utilize marketing messages that 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 the Arizona REALTORS® GRI program growing and evolving.	
Compile and monitor student demographics.	

Recommendation:

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

Discontinue

REALTOR® CONVENTION

This plan 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 and also includes the Arizona REALTORS® business meetings (Executive Committee, Regional Caucuses and the Board of Directors Meeting). Conference format varies from year to year.

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

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Measurable Objectives	Status
Offer a statewide convention 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 and in	

understanding the Arizona REALTORS® value proposition and benefits.	
Investigate partnership/promotion opportunities with brokerages, builders and other real estate related organizations.	
Investigate third party marketing with Requests For Proposals and retain if advisable.	
Identify facility for 2021-2023 conventions	
Promote convention one year in advance.	
Develop talking points and distribute to Region Vice Presidents, officers and PBD committee members.	

Recommendation:

- Continue basically as-is
- Continue with the following modifications: Increase in speaker fees
- Discontinue

SUPPORT & RESOURCES

This is a support budget for services and resources that contribute to the development, administration and offering of the Arizona REALTORS® 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. The 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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Measurable Objectives	Status
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.	
Focus program and class messages to connect with members' success/transaction solutions.	
Print and/or distribute collateral at the Arizona REALTORS® and/or local events.	
Work through appropriate committees to influence ADRE to permit continuing education credit for business-skill related topics.	
Monitor and maintain 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.	
Maintain a monthly calendar for the Arizona REALTORS® education and events and monitor its open/action rates.	
Provide resources for staff attendance at the Arizona REALTORS®, NAR and Education-related conferences/forums.	
Utilize eblast target marketing for education programs using the 3-touch approach as well as social media vehicles.	Facebook ads for CRPM, rCRMS, GRI, MRES Society, programs
Monitor program marketing efforts/results.	
Identify and monitor student demographics for each of the Arizona REALTORS® education programs and utilize in target marketing efforts.	

Recommendation:

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

Arizona REALTORS®
BUSINESS SERVICES & TECHNOLOGY
2020 Business Plan

From: Business Services and Technology
Chair: Steve Redmond
Staff Liaison: Nick Catanesi
Date: 2020

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

The following are programs, products, services and activities (PPSAs) with Business Services and Technology oversight.

CURRENT TOP PRIORITIES

•

RECOMMENDATIONS

•

GROUPS FORMED

•

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® vision: Arizona REALTORS® 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.

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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.	
Create pre-formatted graphics & content for local associations to populate their websites and distribute as needed.	
Collaborate with real estate schools in the state.	
Provide grants to locals to promote and train.	

Recommendation:

- 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® 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.

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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.	

Recommendation:

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

Forms

Arizona REALTORS® controls and provides the delivery of Arizona REALTORS® 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® vision: Instanet Solutions has been selected to control the delivery of Arizona REALTORS® forms and provide the delivery of Arizona REALTORS® forms to the members as a member benefit. zipForm® Plus is provided to members as a benefit from NAR while zipForm® Mobile is provided as a benefit 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.

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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	

Recommendation:

- 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® vision: Arizona REALTORS® eSign provides members with a technology tool through Arizona REALTORS® 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.
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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	

Recommendation:

- 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 the Arizona REALTORS® vision: Arizona REALTORS® Single Sign-On provides members with a technology tool through Arizona REALTORS® 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.

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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 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	

Recommendation:

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® vision: Arizona REALTORS® 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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Measurable Objectives	Status
Develop and maintain data and access to data for Arizona REALTORS® purposes.	

Recommendation:

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® 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.

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

Recommendation:

- 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® 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 the Arizona REALTORS® vision: This program contains basic support items for the network and communications infrastructure of the association.

Importance of PPSA to the critical-to-serve customer: This is an “enabling” program that provides for development and delivery of essential customer benefits.

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

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Measurable Objectives	Status
Data and voice systems uptime is better than 99%, excluding planned maintenance periods	
Security exploits conducted against 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	

Recommendation:

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

Phone

Arizona REALTORS® 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 the Arizona REALTORS® 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® 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® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.
- 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 Objectives	Status
Enhance disaster recovery infrastructure to maintain phone system in event of local physical failure	
Maintain a secure and reliable phone system	
Troubleshoot problems in a quick and efficient manner.	

Recommendation:

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

Network

Arizona REALTORS® 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 the Arizona REALTORS® vision: Provide resources which support the entire network and infrastructure of the association. A major part of this is securing Arizona REALTORS® 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® 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.

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

4. The Arizona REALTORS® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.

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 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 2019	

Recommendation:

Continue basically as-is

Continue with the following modifications

Discontinue

BUSINESS SERVICES AND TECHNOLOGY SUPPORT

Arizona REALTORS® 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 the Arizona REALTORS® 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.
- 4. The Arizona REALTORS® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.
- 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 Objectives	Status
Staff and committee leadership review use of resources via monthly financials	
At year-end, income and expense for this committee’s overall budget are within 10%	

Recommendation:

- Continue basically as-is
- 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® 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.
- 3. The Arizona REALTORS® provides members unsurpassed risk management tools.
- 4. The Arizona REALTORS® assists members in being the best prepared practitioners, with the highest standards, by enhancing their knowledge and skills through education.
- 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 Objectives	Status
The Arizona REALTORS® promotes real estate as a first-time profession to high schools, junior colleges and colleges.	
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.	
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® 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 2019.	
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 www.HomeOwnershipMatters.com/Arizona .	
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.	
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.	
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.	
Communicate the value and success of REALTOR® associations throughout the state by placing at least ten mentions in print or broadcast media in 2019.	
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.	

Consider creating a “What do you want to hear about?” input field for member suggestions in the Arizona REALTOR® VOICE.	
Consider creating pop-up box to chat on website.	
Send a traditional postcard mailing reminding members of the Arizona REALTOR® VOICE.	

Recommendation:

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