



**2021 Strategic Plan**  
**For Board of Directors**  
**Approval**

**Introduction:**

The strategic objectives in the Arizona REALTORS® Strategic Plan are the parameters in which the primary committees will develop strategies to deliver programs, products, services and activities (PPSAs). Specific PPSA planning must be tested against the association vision, purpose and customer.

**The Arizona REALTORS® Vision is:**

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

**The Arizona REALTORS® Purpose is:**

To serve its members by providing and promoting services to enhance members' abilities to conduct their businesses with integrity and competency and to promote the extension and preservation of private property rights.

**The Arizona REALTORS® Customer is:**

The association has diverse customers who are the direct recipients of the association's PPSAs: members in good standing and local member associations.

**Strategic Plan Development:**

This plan is the result of a collaborative effort between staff and leadership, including a remote meeting on April 28<sup>th</sup>. The 2020 Strategic Plan created a solid foundation for the 2021 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 Jan Leighton and CEO Michelle Lind facilitated the planning process. Within our vision and purpose, we will intentionally manage or create an experience for our members and staff.

## 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. Utilize emerging technologies for meetings and communications to reduce travel expenses while maintaining effective governance.

**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.
4. Continue to proactively research and review options for a member Association Health Plan.
5. Continue to review options for retirement/financial planning tools for members.
6. Continue to review options to assist members in the evolving economy.

**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. Provide local associations with orientation resources to include Arizona REALTORS® as needed.
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.
5. Continue opportunities for local association executives to meet and network.

**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 communicate with members.
2. Continue to provide monthly “talking points” on association activities to association Region Vice Presidents 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 Multiple Listing Services, institutes, societies, councils and other homeownership entities on endeavors that benefit the membership.

**Actions:**

1. Encourage communication and collaboration with associations and Multiple Listing Services regarding the member experience.
2. Maintain a collaborative working relationship with Arizona Department of Real Estate.

**Strategic Objective 1.F:** The Arizona REALTORS® cultivates media contacts to promote the value of REALTORS® throughout the state.

**Actions:**

1. Maintain a qualified agency to act as the Arizona REALTORS® representative in the Arizona media market.
2. Take advantage of all opportunities to promote the Association as the Voice for Real Estate in Arizona to consumers.

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

**PURPOSE:** Maintain and advance the Arizona REALTORS® position as the most powerful and influential political force in Arizona.

**Strategic Objective 2.A:** The Arizona REALTORS® proactively identifies issues that impact the real estate industry and advocates to protect private property rights and real property ownership.

**Actions:**

1. Articulate NAR's and 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 the REALTOR® Party.
2. Educate and encourage members to share the value of the REALTOR® Party.
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.

**Actions:**

1. Continue to maintain regular communication and support to local association Government Affairs Directors, attending events and providing updates and presentations as feasible.
2. Maintain current calendar of local association events and encourage attendance.

**Strategic Objective 2.C:** The Arizona REALTORS® strives to achieve NAR RPAC/RAPAC 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 RPAC/RAPAC goals.
2. Articulate RPAC/RAPAC successes to members with emphasis on how it affects their day-to-day business.
3. Establish an emphasis on previous RPAC/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 and advisories 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, marketing service agreements, class-action antitrust lawsuits, 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. Direct agents to their brokers.
4. 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, fix and flips, and REALTOR® as principal transactions.
3. Advise members of the legal risks associated with the use of audio and video surveillance devices.

**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.

**Actions:**

1. Implement procedures to expedite the hearing process and evaluate whether additional resources are needed to accomplish this.
2. Educate members about the Professional Standards enforcement process.
3. Train Professional Standards Committee members to perform their roles across different platforms to promote efficiency and reduce travel time and travel related expenses.

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

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

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

**Actions:**

1. Cultivate an environment that emphasizes and recognizes the benefits and value of life-long learning.
2. Provide low cost or no cost subsidized educational programs as needed.
3. Prepare members for emerging trends/changing trends in the industry.

**Strategic Objective 4.A.1:** The Arizona REALTORS® works through appropriate channels to influence the Arizona Department of Real Estate to permit continuing education 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. Promote existing education resources to the broker member.
2. Focus educational programs on building member success and professionalism.
3. Investigate the feasibility of developing or offering a professionalism program or certification.
4. Investigate the desirability to develop, partner or deliver an education program designed to help new members grow a successful and professional business, incorporating resources and tools available through the REALTOR® associations.

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

**Actions:**

1. Create educational events and opportunities to enhance leadership skills.
2. Provide resources addressing “how to be a leader – where do I start?”
3. Deliver a leadership training program for on-going development of incoming 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. 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.
2. Research and develop, if feasible, an education mobile app.



**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® engages instructors who have exceptional skills and embrace modern teaching techniques.

**Actions:**

1. Provide development opportunities to help enhance instructor skills.
2. Recognize an exceptional instructor through Excellence in Education Award.

**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 and in understanding the Arizona REALTORS® value proposition and benefits.
3. Provide energizing networking opportunities.
4. Investigate partnership/promotion opportunities with brokerages, builders, and other real estate related organizations.
5. Investigate third party marketing firms with Requests for Proposals and retain if advisable.
6. Investigate and evaluate utilizing virtual conference platform for the convention.

## **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 as a member benefit.

**Strategic Objective 5.B:** The Arizona REALTORS® provides technology tools, 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.
2. Create pre-formatted graphics & content for local associations to populate their websites and distribute as needed.
3. Collaborate with real estate schools in the state.
4. Provide grants to locals to promote and train.

**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 market those offerings.

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

**Actions:**

1. 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® identifies and recruits members who are technologically adept to enhance the goals of the committee.

**Actions:**

1. Create a mechanism for 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 using methods that inform, connect and engage 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 with members and local associations to identify their needs and provide communication services.

**Strategic Objective 6.C:** The Arizona REALTORS® reviews, best practices in search, website navigation, and user interface; and integrates these practices into the Arizona REALTORS® blogs and websites.

**Actions:**

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

**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. Conduct research on the preferred communications methods of our members and communicate with our members through those methods.
2. Research the creation of a pop-up box to chat on aaronline.com.
3. Mail a traditional postcard reminding members of the *Arizona REALTOR® VOICE*.

**Strategic Objective 6.D:** The Arizona REALTORS® will engage in four consumer outreach activities each year.

**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® promotes community involvement activities.

**Strategic Objective 6.D.3:** The Arizona REALTORS® communicates advocacy efforts.

**Actions:**

1. Promote advocacy efforts with a focus on consumer outreach and education to the public and members.

**Strategic Objective 6.D.4:** The Arizona REALTORS® solicits community outreach efforts conducted by REALTOR® members and recognizes them through an annual award.

**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® uses social media to deliver timely and relevant content to member associations to help foster discussion.

**Actions:**

1. Communicate the association's initiatives, and work in progress to members.

**Strategic Objective 6.G:** 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.
2. Form a Diversity Committee to aid in increasing awareness of the association's membership diversity, promote the real estate profession, and other diversity initiatives in partnership with NAR.

**Strategic Objective 6.H:** 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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