



# **2022 Strategic Plan**

**Introduction:**

The strategic objectives in the Arizona REALTORS® Strategic Plan are the parameters in which the primary committees will develop strategies to deliver programs, products, services, and activities. The Strategic Plan 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 enhance members’ abilities to conduct their businesses with integrity and competency; to provide a superior consumer experience; and to promote the extension and preservation of private property rights.

**The Arizona REALTORS® Serves:**

REALTOR® members and local REALTOR® associations who are the direct recipients of the association’s programs, products, services, and activities.

**Strategic Plan Development:**

The Arizona REALTORS® President-Elect Gary Nelson and Ron Phipps facilitated the 2022 planning process. This plan is the result of a collaborative effort between staff and leadership, including a meeting on April 27<sup>th</sup> and 28<sup>th</sup> in Sedona, Arizona. The 2021 Strategic Plan created a solid foundation for the 2022 Strategic Plan so that the participants concentrated on specific questions posed to create programs and initiatives that support the association’s culture.

Within our vision and purpose, we will intentionally manage or create a superior experience for our members and staff.

## AREA 1: GOVERNANCE AND OPERATIONS

**PURPOSE:** The Arizona REALTORS® is a professional REALTOR® association that functions within a nimble 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. Proactively research and review options for the Arizona REALTORS® efficiency and improvement.
2. **Attract and retain superior staff and maintain a staff succession plan.**
3. Promote diversity, equity, and inclusion in staff hiring practices.
4. 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 REALTORS® 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 REALTOR® 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 REALTOR® 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.
6. Provide communication and training of volunteer leaders and staff on the differing roles of the local/state/national REALTOR® Associations.
7. Encourage participation of the best and brightest REALTOR® leaders.

**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 REALTOR® 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 with 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 real estate industry 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 relationships and leverages opportunities 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.
5. Promote and support legislation that improves REALTOR® professionalism and facilitates a superior consumer experience.

**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 national and local REALTOR® associations, Arizona REALTORS® regional vice presidents and

multiple listing services to identify risk management needs.

**Strategic Objective 3.G:** The Arizona REALTORS® maintains an effective Legal Hotline and publishes meaningful legal information for the benefit of REALTORS® and their clients.

**Actions:**

1. Share the dangers posed by social media.
2. Educate on potential ethical and legal liabilities associated with off-market listings, fix and flips, and REALTOR® as principal transactions.
3. Advise REALTORS® 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 and provide enhanced training on how to file a complaint via video and articles.
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® provides members with professional development programs and opportunities that enable REALTORS® to conduct their business competently, professionally, and ethically.

**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. Identify and deliver additional educational resources to broker members.
2. Focus educational programs on building REALTOR® 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 REALTORS® 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 REALTORS® 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 REALTOR® 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 TECHNOLOGY**

**PURPOSE:** The Arizona REALTORS® supports the success of REALTORS® through technological information and 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 REALTORS® how to use business technologies.
2. Create pre-formatted graphics and content for local associations to populate their websites and distribute as needed.
3. Provide information and assistance to real estate schools and local associations to promote REALTOR® technology tools and provide training on their usage.

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

**Actions:**

1. Research and inform REALTORS® 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 REALTOR® members and market those offerings.

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

**Actions:**

1. Investigate strategies for member engagement via the Single Sign-On platform using targeted pop-up messaging based on criteria from the enhanced member profile data within RAMCO.
2. Support and enhance customer service platforms (such as ZenDesk) to identify and track technology issues.

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

**Actions:**

1. Create a mechanism for REALTOR® generated content regarding technology related issues and practices.

## **AREA 6: COMMUNICATIONS: REALTOR® ENGAGEMENT AND CONSUMER OUTREACH**

**PURPOSE:** The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.

**Strategic Objective 6.A:** The Arizona REALTORS® disseminates pertinent, relevant, and timely industry information.

**Strategic Objective 6.B:** The Arizona REALTORS® engages with REALTORS® and local associations to identify needs, provide communication services, and inform on issue resolution techniques.

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

**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 REALTOR® members and communicate with our members through those methods.

**Strategic Objective 6.D:** The Arizona REALTORS® engages in at least four consumer outreach activities each year.

**Strategic Objective 6.D.1:** The Arizona REALTORS® will be an effective Voice for Real Estate by championing REALTORS® and private property rights in Arizona.

**Strategic Objective 6.D.2:** The Arizona REALTORS® promotes, measures, reports, and shares REALTOR® volunteerism and community involvement.

**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 REALTOR® members.

**Strategic Objective 6.D.4:** The Arizona REALTORS® identifies community outreach efforts conducted by REALTORS® 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.

## AREA 7: DIVERSITY, EQUITY, AND INCLUSION

**Purpose:** The Arizona REALTORS® commits to building stronger, inclusive, and diverse association leadership and membership to better represent the communities served and ensure a superior consumer experience by building dynamic, inclusive, and safe communities.

**Strategic Objective 7.A:** Increase the diversity of REALTOR® members and REALTOR® leadership to better represent the communities in which they serve.

**Strategic Objective 7.B:** Provide REALTORS® with opportunities for open dialogue about diversity, equity, and inclusion.

**Strategic Objective 7.C:** Promote REALTORS® understanding and perception of diversity to create a more respectful and inclusive industry and consumer experience.

**Strategic Objective 7.D:** Create opportunities for REALTOR® outreach to diverse communities to provide those communities with information about the real estate industry and profession.

**Strategic Objective 7.E:** Investigate the feasibility of providing scholarships for pre-licensing and academic programs for diverse individuals with an interest in becoming a REALTOR® and implement if feasible.

**Actions:**

1. Provide additional education and mentoring resources.

**Strategic Objective 7.F:** Develop communications that promotes real estate as an inclusive profession.

**Actions:**

1. Promote real estate as a first-time profession to individuals in high schools, colleges, and universities.

**Strategic Objective 7.G:** Support and promote fair housing.

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

**ARIZONA REALTORS®**

**STRATEGIC PLAN CERTIFICATION**

This Strategic Plan includes Advocacy and Consumer Outreach components and has been officially adopted by the Board of Directors of the Association. It will be reviewed annually by the Board of Directors and submitted to NAR for approval.

**Board of Directors approval on:**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**President's signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**President-Elect's signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**CEO's signature**

\_\_\_\_\_  
**Date**