

Arizona REALTORS®
LEGISLATIVE AND POLITICAL AFFAIRS
2023 Business Plan

Committee: Legislative and Political Affairs
Chair: Paul Baker
Staff Liaison : Matthew Contorelli
DATE: 2023

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

Electing REALTOR® Champions
Increasing Major Investors in 2022

RECOMMENDATIONS

None at this time.

GROUPS FORMED

RAPAC Candidate Questionnaire Review Workgroup
Legislative Policies Review Workgroup

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®.

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

1. X 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.
2. X The Arizona REALTORS® maintains and advances the Arizona REALTORS® position as the most powerful and influential political force in Arizona.
3. ___ The Arizona REALTORS® provides members with unsurpassed risk management tools.
4. ___ The Arizona REALTORS® provides members with professional development programs and opportunities that enable REALTORS® to conduct their business competently, professionally, and ethically.
5. X The Arizona REALTORS® supports the success of REALTORS® through technological information, services, and training.
6. X The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.
7. X 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.

Measurable Objective	Status
Assign tasks to all governmental area workgroups within approved budget parameters.	
Continue with a “Thank You” lunch for each of the four government affairs committees.	

Recommendations:

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

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	Status
Activate broad-based Arizona REALTORS® membership representation in lobbying activities through legislative committee appointments and related committee activities.	
Encourage application to state boards and commissions.	
Strengthen and maintain relationships with Arizona statewide officeholders and agency department heads.	
Develop ambassador program with ambassador events to connect elected officials with REALTORS® that live and work in their communities.	
Strengthen and maintain relationships with housing industry partners through ongoing communications.	

Achieve an 85% success rate on Arizona REALTORS® legislative policy priorities.	
Conduct daily monitoring of legislation and recommend positions to the Legislative Committee in conjunction with the approved Legislative Policy Statements.	
Monitor member involvement in political campaigns.	
Finalize 2022 legislative policies list by October 2021.	
Evaluate state-level candidates on Arizona REALTORS® legislative policies and voting record to receive funds.	
Promote and support legislation that improves REALTOR® professionalism and facilitates a superior consumer experience.	

Recommendations:

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

Local Lobbying Support - 1545

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Measurable Objective	Status
Assist local associations in their lobbying efforts as issues arise.	
Encourage local associations to establish an advocacy program and provide assistance as requested.	

Recommendations:

- Continue basically as-is

- Continue with the following modifications
- Discontinue

Legislative Policy Development - 1550

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Measurable Objective	Status
Poll members for their opinions through use of formal and informal methods.	
Continue to involve stakeholders on real estate related issues.	
Encourage proportional regional representation at the REALTOR® Caucus.	
Forward all legislative recommendations to the Legislative and Political Affairs Committee for review and appropriate action.	
Host 2021 REALTOR® Day Luncheon or other event if large gatherings are prohibited.	
Identify for participation in, or host, a second legislator event.	
Achieve attendance of 65% of legislators at legislative events.	
Identify attendees for legislative events through political involvement and leadership activity.	

Recommendations:

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

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	Status
Finalize the political activities fundraising plan by December 31st by the previous plan year.	
Identify members to participate in the annual REALTOR® Party training.	
Provide fundraising tips, tools, and promotional materials for local associations.	
Distribute REALTOR® Party updates with local associations and provide Statewide RAPAC graphs.	
Visit, at a minimum of one time annually, with each local association to promote fundraising activities.	
Utilize the NAR RAPAC Grant stipend for promotion of RAPAC.	
Utilize the Major Investor Program NAR stipend to host an Arizona REALTORS® Major Investor Event.	
Achieve participation of local associations in Major Investor Events.	
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 Chair.	

Achieve 100% or NAR Major Investor Goal for 2021. Benchmarks: 50% of goal by April; 75% of goal by June; 100% by September 30.	
Recognize Major Investors with gift.	
Recognize President Circle members with gift.	
Recognize Hall of Fame members with gift.	
Communicate state and federal election law requirements to local associations for RAPAC to remain in compliance at the state and federal level.	
Host a fundraising event at the Spring Conference/Convention.	
Host a fundraising event at the Leadership Conference.	
Recognize RAPAC Major Investors on aaronline.com.	
Recognize RAPAC Major Investors with special recognition at REALTOR® Day at the Capitol.	
Recognize RAPAC Major Investors with special recognition at REALTOR® Caucus.	
Plan and host an annual Major Investor Event that will both incentive new Major Investors and show appreciation to existing Major Investors	
Maintain Leadership Appreciation Program to connect Arizona REALTORS® leaders with Major Investors for recognition of investment.	
Increase use of NAR grant programs by 50% over 2020 utilization by local associations.	
Continue to maintain regular communication and support to local association Government Affairs Directors, attending events and providing updates and presentations as feasible.	
Maintain current calendar of local association events and encourage attendance.	
Establish a permanent RAPAC Hall of Fame recognition at the Arizona REALTORS® office to communicate the ongoing member dedication to RAPAC.	

Recommendations:

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 Continue with the following modifications
 Discontinue

Federal Liaison Support - 1575

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Measurable Objective	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.	
Register all FPCs with NAR's REALTOR® Action Center.	
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.	
Ensure FPCs attend required Mid-Year meetings.	
Ensure compliance that all FPCs attend required NAR training session on their roles and responsibilities.	
Oversee that each FPC team will hold one meeting locally or attend a fundraiser with their congressman/senator or their staff during the year.	
Maintain strong communication with Congressional staff through ongoing contacts on issues important to Arizona.	
Attendance at meetings with Members of Congress during the NAR Mid-Year Hill Visits is by invitation only.	
Ensure compliance that FPCs meet any NAR requirements.	
Establish a Hill Visit Reception for all Arizona members who attend NAR Mid-Year and invite each MOC.	
Establish funds for FPC in-district meetings/receptions.	

Recommendations:

Continue basically as-is

___ Continue with the following modifications

___ Discontinue

Governmental Communications - 1585

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Measurable Objective	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.	
Produce REALTOR® Party video annually with focus on legislative successes and what that means for their industry/ business/ clients.	
Provide Calls to Action responses, when necessary, for targeted and effective immediate member communication with Arizona legislators and Members of Congress on critical issues.	
Work with REALTOR® Party Plus to increase opt-in for text response Calls for Action.	
Utilize digital advertising and technologies to push federal CFAs to members.	
Maintain current information on each governmental program at aaronline.com.	
Communicate with HMA Public Relations for press releases when large successes occur, or the consumer needs to be educated on the association's wins.	

Communicate how Issues Mobilization and RAPAC reserves can enhance local association political objectives.	
Communicate the importance of the Arizona REALTORS® legislative/political successes to members.	
Continue to communicate the mechanism by which members can relay, on a year-round basis, legislative comments, and proposals.	
Utilize the broker involvement program/stipend to enroll local brokers for participation in NAR's BIP to increase response rates to calls for action.	
Work with REALTOR® Party Plus to identify a predictive model to target members for increased activism on legislative issues and advocacy initiatives.	
Implement the use of geofencing, beacon and direct one-to-one digital advertising technologies for concentrated message delivery during a Call for Action.	
Engage and inform diversity focused REALTOR® organizations across the state.	

Recommendations:

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- Continue with the following modifications
- Discontinue

Political Research - 1596

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

Recommendations:

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

Arizona REALTORS®
RISK MANAGEMENT COMMITTEE
2023 Business Plan

FROM: Risk Management Committee (RMC)
Chairman: Cathy Swann
Vice Chairman: Phil Sexton
RMC Liaison: Nikki J. Salgat
DATE: 2023

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**

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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 and provide enhanced training on how to file a complaint via video and articles.	
Train Professional Standards Committee members to perform their roles across different platforms to promote efficiency and reduce travel time and travel related expenses.	
Offer Spanish translations of Professional Standards forms and procedures	
Recruit and reach out to members to continue to increase diversity on the Professional Standards Committee	

Recommendations:

Continue basically as-is

Continue with the following modifications – see Measurable Objectives

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.	

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.

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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 REALTORS® and their clients 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
Monitor equity, diversity, and inclusion trends and any potential liability associated with providing crime statistics/demographics.	
Monitor and identify liability trends.	
Foster alliances with defense attorneys and E&O carriers and mediators.	
Monitor marijuana legal conflicts, marketing service agreements, affiliated business arrangements, joint ventures, class-action antitrust lawsuits and comfort animals - Keep members informed as these issues evolve.	
Educate on potential ethical and legal liabilities associated with clear cooperation wholesaling, fix and flips and REALTOR® as principal transactions.	
Share the dangers posed by social media.	
Advise REALTORS® of the risks associated with the use of audio and video surveillance devices.	

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 national and local REALTOR® associations, Arizona REALTORS® regional vice presidents and multiple listing services to identify risk management needs.	

Recommendations:

Continue basically as-is

Continue with the following modifications – see Measurable Objectives

Discontinue

LEGAL & INDUSTRY PUBLICATIONS

Our members need current, accurate, and timely legal, legislative, and risk management updates and information to reduce liability and ensure 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:

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- 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 Spring 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 which focus point is addressed by the PPSA.

1. 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.
2. The Arizona REALTORS® maintains and advances the Arizona REALTORS® position as the most powerful and influential political force in Arizona.
3. The Arizona REALTORS® provides members with unsurpassed risk management tools.
4. The Arizona REALTORS® provides members with professional development programs and opportunities that enable REALTORS® to conduct their business competently, professionally, and ethically.
5. The Arizona REALTORS® supports the success of REALTORS® through technological information and services.
6. The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.
7. 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.

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 which focus point is addressed by the PPSA.

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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®
BUSINESS TECHNOLOGY & COMMUNICATIONS
2023 Business Plan

From: Business Technology and Communications
Chair: Nicole Cumbie
Staff Liaison: Dan Pemberton
Date: 2023

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

- Focus on promoting new member benefits such as Photofy and Breeze
- Identify products and services that will provide cost savings to the Association.
- Continue to provide members with strong support and training of member benefits via our support channels.

RECOMMENDATIONS

GROUPS FORMED

BUSINESS SERVICES

Arizona REALTORS® provides technology tools 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® identifies and recruits REALTORS® who are technologically adept to enhance the goals of the committee. (Strategic Objectives 5.E)

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.

1. ___ 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.
2. ___ The Arizona REALTORS® maintains and advances the Arizona REALTORS® position as the most powerful and influential political force in Arizona.
3. ___ The Arizona REALTORS® provides members with unsurpassed risk management tools.
4. ___ The Arizona REALTORS® provides members with professional development programs and opportunities that enable REALTORS® to conduct their business competently, professionally, and ethically.
5. X The Arizona REALTORS® supports the success of REALTORS® through technological information, services and training.
6. X The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.

7. ___ 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.

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 REALTORS® how to use business technologies through various platforms.	
Utilize member information via our membership database to identify REALTORS® with pertinent expertise. Creation and use of targeted committee application, nomination, and referrals.	
Create pre-formatted graphics and content for local associations to populate their websites and distribute as needed through Photofy.	
Provide information and assistance to local associations and brokerages to promote REALTOR® technology tools and provide training on their usage.	

Recommendation:

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

Photofy, Breeze and The Tech Helpline®,

Arizona REALTORS® provides technology tools, 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® researches, vets, 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 REALTOR® and market those offerings. (Strategic Objectives 5.B, 5.C)

Measurable Objectives	Status
Usage statistics are compiled and shared with the Committee.	
Market for member awareness and increased use	
Research and inform REALTORS® on how to choose the right technologies for their business through multiple channels of communication with the Tech Workgroup being tasked to investigate products and services and making recommendations.	
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 as a member benefit through Transaction Desk/Authentisign and or forms licensee partners. Arizona REALTORS® negotiates discounts for products and services that benefit REALTOR® and market those offerings. (Strategic Objectives 5.A and 5.D)

Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	
Conduct trainings on a monthly/bi-weekly basis	
Pursue partnership and collaboration opportunities to teach REALTORS® how to use business technologies through various platforms.	
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 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® researches, vets, and provides information on recommended products and services that increase efficiency, profitability, and digital security of REALTOR® business operations. Arizona REALTORS® negotiates discounts for products and services that benefit REALTORS® and market those offerings. (Strategic Objectives 5.B, 5.C and 5.D)

Measurable Objectives	Status
Usage statistics are compiled and shared with BT&C Committee.	
Conduct trainings on a weekly basis	
Research and inform REALTORS® on how to choose the right technologies for their business through multiple channels of communication with the Tech Workgroup being tasked with investigating products and services and making recommendations.	
Maintain positive member responses	
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.	

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. Identify products and services that will provide cost savings to the Association.

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

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5. X The Arizona REALTORS® supports the success of REALTORS® through technological information services, and training.
6. X The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.
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Measurable Objectives	Status
Develop and maintain data and access to data for Arizona REALTORS® purposes.	

Recommendation:

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

Enhanced Member Profile

Arizona REALTORS® develops and maintains data, member profile, to better understand member needs, engage more effectively with members and maximize adoption of Arizona REALTORS® programs and services (SP: 5.D).

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:

- X 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, engage more effectively with members, and maximize adoption of Arizona REALTORS® programs and services (SP: 5.E).

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 engage more effectively with members (SP: 5.E). Nextiva is our new phone web-based phone service provider effective 12/2020.

Measurable Objectives	Status
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 engage more effectively with members and each other (SP: 5.E).

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	

BUSINESS SERVICES AND TECHNOLOGY SUPPORT

Arizona REALTORS® Business Services and Technology area will provide top notch technical and customer support to its members.

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

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Measurable Objectives	Status
Staff and committee leadership review use of resources via monthly financials	
Support and enhance customer service platforms (such as ZenDesk) to identify and track technology issues. Gather demographics and make the information and data available to local REALTOR® Associations when appropriate.	
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

2023 COMMUNICATIONS: REALTOR ENGAGEMENT AND CONSUMER OUTREACH BUSINESS PLAN

Christina Smalls, Staff Liaison

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

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

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Measurable Objectives	Status
Disseminate pertinent, relevant, and timely industry and association information through social media, aaronline.com, videos, and newsletters.	
Engage with REALTORS® and local associations to identify needs, provide communication services, and inform on issue resolution techniques.	
Review, best practices in search functionality, website navigation, and user interface; and integrates these practices into the Arizona REALTORS® website.	
Organize information on the website for easy search and access by members.	
Conduct research on the preferred communications methods of our REALTOR® members and communicate with our members through those methods.	
Engage in at least four consumer outreach activities each year and promote community involvement activities of members.	
Promote REALTOR® volunteerism and community involvement.	
Promote advocacy efforts with a focus on consumer outreach and education to the public and REALTOR® members.	

Identify community outreach efforts conducted by REALTORS® and recognize them through an annual award.	
Promote the value of using REALTORS®.	
Communicate the value and successes of REALTOR® associations throughout the state by placing at least ten mentions in print or broadcast media in 2023.	
Use social media to deliver timely and relevant content to member associations to help foster discussion; and is managed and monitored to ensure a steady rise in engagement	
Communicate the association's initiatives and work in progress to members.	
Communication statistics are compiled and shared monthly.	
Print and digital collateral adheres to the Arizona REALTORS® brand and is member centric and speaks to Arizona REALTORS® value proposition.	
Engage in regular outreach to members to elicit discussions by posing questions on social media and in The Voice.	
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.	

2023 DIVERSITY, EQUITY, AND INCLUSION BUSINESS PLAN

Torey Gannon, Committee Chair

Christina Smalls, Staff Liaison

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

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Measurable Objectives	Status
Increase the diversity of REALTOR® members and REALTOR® leadership to better represent the communities in which they serve.	
Maintain a DEI Ambassador group – welcome members to events and help share our messaging on social media.	
Create a Leadership Mentor Program – identify and mentor upcoming diverse leaders.	
Create graphics showcasing various leaders	
Provide REALTORS® with opportunities for open dialogue about equity, diversity, and inclusion	
Host sessions and create videos with scenarios on empowering action when faced with discrimination	
Create videos to educate and re-educate about the importance of inclusivity and Article 10 changes	
Create videos on pronoun usage and how to get comfortable discussing this topic with consumers	
Promote REALTORS® understanding and perception of diversity to create a more respectful and inclusive industry and consumer experience	
Emphasize and educate both REALTORS® and the public about the document recorded by ADRE with	

every County Recorder's Office in Arizona disclaiming the validity and enforceability of discriminatory restrictions and covenants	
Create opportunities for REALTOR® outreach to diverse communities to provide those communities with information about the real estate industry and profession	
Record short video messages	
Record videos about empowering consumers to become homeowners	
Promote, via a 2-year plan in underserved communities, the importance of home ownership, convey the message that the association is their ally in getting them to their goal of home ownership	
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	
Provide additional education and mentoring resources	
Research feasibility of offering pre-licensing scholarships	
Research conducting outreach presentations to high schools, career fairs, and in underserved communities in collaboration with YPN agents	
Create a resource on the Arizona REALTORS® website with presentation materials for REALTOR® members to utilize when engaging in outreach activities	
Develop communications that promote real estate as an inclusive profession	
Promote real estate as a first-time profession to individuals in high schools, colleges, and universities	
Maintain the "DEI in A Box" resource for Association/Board trainings	
Maintain a DEI social media Calendar (pride month, women's history month, etc.).	
Support and promote fair housing	
Investigate working with NAR on its "Tester Program" for brokers to identify fair housing violations	
Request that the Risk Management Committee consider drafting a Fair Housing Disclosure either as a separate document or to be included in an existing residential resale form	
Create Fair Housing "Marketing in a Box."	

**Arizona REALTORS®
Professional and Business Development
2023 Business Plan**

From: Professional and Business Development (PBD) Committee
Chair: Kathy Laswick
Staff Liaison: Barb Freestone
Date: 2023

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.

BROKER UNIVERSITY

This plan provides for the development, delivery or promotion of education programs/resources designed specifically for brokers and managers to stay informed of emerging legal issues, trends, and regulations.

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

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Measurable Objectives	
Offer programs designed to keep brokers educated and updated on issues and trends.	

When feasible, offer or promote CRB classes.	
Provide information regarding Arizona REALTORS® education programs and the CRB designation information.	

Recommendation:

- Continue basically as-is
- Continue with the following modifications: Addition of a live Broker Summit
- 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	
Partnership opportunities are made available to local associations and firms for live and virtual offerings.	
Monitor attendee feedback to update curriculum as needed.	
Maintain a cadre of qualified instructors.	
Maintain a dedicated instructor page to house course materials.	

Provide competitive and affordable registration fees including a discounted registration fee for rCRMS holders.	
Recognize newly certified members on the Arizona REALTORS® social media and events where appropriate.	

Recommendation:

- Continue basically as-is
- Continue with the following modifications: Adjust one-day registration fee to \$59 (from \$69); adjust budget to reflect AAR offered-classes, eliminating anticipation
- Discontinue

EDUCATION OUTREACH

The Arizona REALTORS® provides comprehensive, reliable, and accessible professional development that is learner-centered to REALTOR® members. This program establishes an overall structure for partnership opportunities with local associations, brokerages and allied industries to deliver education programs at competitive and affordable fees through live classroom and live streaming classes. This program also includes 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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Measurable Objectives	
Engage experienced instructors who meet the AAR Instructor Standards.	

Partner with the state Women’s Council of REALTORS to offer a Women’s Conference	
Participate in collaboration with allied entities where feasible.	
Provide partnership opportunities for direct offerings and revenue share opportunities for live streaming classes for education related classes in the PBD business plan.	
Maintain an 80% student satisfaction level in all classes offered relating to relevancy, engagement and application.	
Provide course partners with marketing flyers.	
Deliver an Annual program featuring national speakers for changing trends and business practices in the industry.	
Assist local associations with interpreting new or current ADRE education rules.	

Recommendation:

- Continue basically as-is
- Continue with the following modifications: Addition of collaboration with WCR to offer an annual Women’s Conference.
- Discontinue

EDUCATION DEVELOPMENT

This plan sets the foundation that raises the bar in the quality of online and live education in content design. Education program development provides direction and structure to be learner focused and contain engagement and application activities that position the REALTOR® member to grow and succeed.

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

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6. ___ The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.
7. ___ 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.

Measurable Objectives	
Maintain and update education platform license.	
Conduct annual review of live streaming platform	
Curriculum development and delivery resources are available and utilized.	
Produce Contract Conversation videos as needed.	

Recommendation:

- Continue basically as-is
- Continue with the following modifications:
- 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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2. ___ The Arizona REALTORS® maintains and advances the Arizona REALTORS® position as the most powerful and influential political force in Arizona.
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Measurable Objectives	
Provide Instructor Development opportunities to adapt to the learner and utilize modern teaching techniques.	
Provide opportunities for instructors to network and share teaching strategies, engagement activities and technology tools with each other.	
Provide information or training for members interested in becoming an ADRE approved instructor.	
Provide training and resources for instructors who utilize Zoom platform to teach AAR’s live streaming classes.	
Continue to proactively monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	
Provide one scholarship to the Bob Pike “Train the Trainer” for one Arizona REALTORS® instructor who would benefit from the program.	
Recognize an exceptional instructor through Excellence in Education Award.	

Recommendation:

- Continue basically as-is
- Continue with the following modifications:
- 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	
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	
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 pathways to Leadership.	
Provide resources addressing “how to be a leader – where do I start?”	

Recommendation:

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

Professionalism Program Outreach

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	

Provide a program which recognizes members' education commitment and accomplishments.	
Utilize a variety of channels to distribute Education Achievement program information.	
Monitor and promote NAR's Commitment to Excellence and Fairhaven programs through a variety of methods and targets.	
Provide opportunities and resources to help new members' journey to success.	
Provide a virtual new agent training workshop/program.	
Increase awareness of AAR's Professionalism webpage.	

Recommendation:

- Continue basically as-is
- Continue with the following modifications: Discontinue quarterly webinar program, rollout RISE (REALTORS® Inspiring Service Excellence) program
- 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	
Partnership opportunities are available to local associations and firms for live and virtual offerings.	
Maintain a cadre of qualified instructors.	
Offer a Summit and or webinars 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	
The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	
Co-host a quarterly 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.	
Survey designees 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.	
Pre-announce scholarship entry dates to brokers with a reminder of the value of GRI to their agent's success.	
Provide GRI Administration orientation to new education staff.	
Recognize new designees through social media and announcements and provide resources to help them promote their accomplishment.	
Provide a financial scholarship program to members with a portion dedicated to opportunities for new members.	
Increase the awareness of the GRI program to new members.	
Participate in collaboration efforts with CRS to increase awareness of the building blocks from each program.	
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: Adjust one-day registration fee to \$59 (from \$69) to be consistent with fees for our other one-day fees; adjust quarterly webinars to one annual webinar.

Discontinue

REALTOR® SUMMIT

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	
Offer a statewide event 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 event 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.	
Provide partnership opportunities with affiliated real estate organizations.	
Investigate and implement, when feasible based on location and schedule, virtual delivery option.	
Identify event facilities/dates two years in advance.	
Promote event one year in advance.	
Develop talking points and distribute to Region Vice Presidents, officers, AEs and PBD committee members.	

Recommendation:

- Continue basically as-is (renamed plan to reflect 2021)
- Continue with the following modifications: provide meeting space and vendor tables for affiliated real estate organizations.
- 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	
Appropriate groups are formed and kept updated throughout the year.	
Provide the necessary equipment, supplies, subscriptions, licenses and tools to implement the business plans, host/house online program and registration functions.	
Participate in firm and local events when available to promote education programs.	
Work through appropriate committees to influence ADRE to permit continuing education credit for business-skill related topics.	
Appropriate technologies and resources are available and utilized to create and retain a state-of-the-art learning environment available to members.	
Appropriate resources are available for staff attendance at the Arizona REALTORS®, NAR and Education-related conferences/forums.	
Research and investigate LMS platforms to host our current online business planning course and any future online courses.	
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®
OPERATIONS AND STRATEGIC INITIATIVES
2023 Business Plan

FROM: Operations & Strategic Initiatives
Chair: Mandy Neat, Treasurer
Staff Liaison: Scott Drucker, CEO
DATE: 2023

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.

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Measurable Objectives	Status
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Determine real estate firm representatives for 2024 Board of Directors based on 12/31/22 membership numbers.	
Establish recommendations for allocation of surplus from 2022 operating budget for Board of Directors approval.	
Begin 2024 officer election process. Announce deadline and application submission dates. Submit 2024 candidate statements for Board of Directors vote.	
Operate in compliance with bylaws, policies, and applicable laws.	
Communicate upcoming meeting times and agendas effectively.	
Utilize emerging technologies for meetings and communications to reduce unnecessary travel while maintaining effective governance.	
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

Recommendations:

- 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 2024 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 2024. 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.	
Continue to provide monthly “talking points” on association activities to association Region Vice Presidents and leadership.	
Continue to proactively research and review options for a REALTOR® Association Health Plan.	
Continue to review options for retirement/financial planning tools for members.	
Empower leadership with the tools to communicate with REALTOR® members.	
Continue to review options to assist members in the evolving economy.	
Utilize emerging technologies for meetings and communications to reduce travel while maintaining effective governance.	
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
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Recommendations:

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

ASSOCIATION RELATIONS

The Arizona REALTORS® partners with and collaborates with local REALTOR® 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.

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

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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 2024 director entitlements for local associations using 12/31/22 membership report.	
Determine which Arizona association executives are eligible to serve on 2024 Board of Directors.	

Provide local associations with orientation resources to include Arizona REALTORS® as needed.	
Continue 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.	
Encourage communication and collaboration with associations and Multiple Listing Services regarding the member experience.	
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, multicultural organizations, and other real estate industry entities on endeavors that benefit the membership. (CCIM/IREM, VAREP)	
Influence members to utilize REALTOR® brands (products and services).	
Provide communication and training of volunteer leaders and staff on the differing roles of the local/state/national REALTOR® Associations	
Encourage participation of the best and brightest REALTOR® leaders.	
The Arizona REALTORS® identifies community outreach efforts conducted by REALTORS® and recognizes them through an annual award.	

Recommendations:

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

CONSUMER OUTREACH

The Arizona REALTORS® will demonstrate engagement in not less than four meaningful consumer engagement activities annually. The Arizona REALTORS® cultivates media relationships and leverages opportunities to promote the value of REALTORS® throughout the state.

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Measurable Objectives	Status
Respond to media requests for interviews and information.	<input type="checkbox"/> earned media spots in 2023 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.	
Maintain a qualified public relations agency to act as the Arizona REALTORS® representative in the Arizona media market.	
Take advantage of all opportunities to promote the Association as The Voice for Real Estate in Arizona to consumers.	
Engage the public in legislative/political issues that impact real estate and related issues.	
The Arizona REALTORS® promotes the value of using REALTORS® and communicate the value and successes of the REALTOR® association throughout the state.	

Recommendations:

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

NATIONAL ASSOCIATION

The Arizona REALTORS® is regarded as an influential voice and partner with the NATIONAL ASSOCIATION OF REALTORS®.

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

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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	

Recommendations:

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

REGION 11

The Arizona REALTORS®, as a member of Region 11, plays a vital role in its influence on NAR policy and decision making. Arizona REALTORS® is regarded as an influential voice and partner with the NATIONAL ASSOCIATION OF REALTORS®.

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

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

Recommendations:

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

DUES/FINANCIAL

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

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

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4. The Arizona REALTORS® provides members with professional development programs and opportunities that enable REALTORS® to conduct their business competently, professionally, and ethically.
5. The Arizona REALTORS® supports the success of REALTORS® through technological information, services, and training.
6. The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.
7. 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.

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.	
Proactively research and review options for Arizona REALTORS® efficiency and improvement.	
Prepare suggested budget adjustments, if necessary, for Executive Committee consideration.	
Monitor: <ul style="list-style-type: none"> • Capital Reserve fund account balances 	

<ul style="list-style-type: none"> • 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 2024 Operating and Capital budget with the 2024 Executive Committee and Board of Directors.	

Recommendations:

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

BUILDING

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

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

- 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.
- The Arizona REALTORS® maintains and advances the Arizona REALTORS® position as the most powerful and influential political force in Arizona.
- The Arizona REALTORS® provides members with unsurpassed risk management tools.
- The Arizona REALTORS® provides members with professional development programs and opportunities that enable REALTORS® to conduct their business competently, professionally, and ethically.
- The Arizona REALTORS® supports the success of REALTORS® through technological information, services, and training.
- The Arizona REALTORS® communicates using methods that inform, connect, and engage REALTORS®, local REALTOR® associations, and consumers.
- 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.

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 2023 Capital Budget.	
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Recommendations:

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

PERSONNEL/OVERHEAD

In order to accomplish the Strategic Plan, area business plans deliver member value and work as a collaborative partner with national and local member associations. The Arizona REALTORS® must have knowledgeable staff that can serve as leaders in the industry.

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

1. 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.
2. The Arizona REALTORS® maintains and advances the Arizona REALTORS® position as the most powerful and influential political force in Arizona.
3. The Arizona REALTORS® provides members with unsurpassed risk management tools.
4. The Arizona REALTORS® provides members with professional development programs and opportunities that enable REALTORS® to conduct their business competently, professionally, and ethically.
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7. 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.

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.	
Attract and retain superior staff and maintain a staff succession plan.	
Promote equity, diversity, and inclusion in staff hiring practices.	

Recommendations:

- 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.	

Recommendations:

- 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.	

Recommendations:

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