



**MULTIPLE LISTING SERVICE OF
SOUTHERN ARIZONA**



Tucson REALTORS®
Charitable Foundation
Serving Our Community First

STRATEGIC PLAN

2018-2020

A professional trade organization with a clear vision for the future.



Vision: Your essential real estate resource.

Mission: Collaborating with innovators, leaders, professionals and communities to strengthen the real estate industry through education, communication, advocacy and service.

GOALS



Communication: To be a conduit of conversation through innovative methods with our members, staff, industry and community to foster understanding and a meeting of the minds.



Regionalization: Development and implement a model to provide operational and support services to real estate related organizations.



Emerging Trends: Identify opportunities and threats to the industry and develop strategies to foster innovation, education and protect.



Professional Development: Raise the bar of professionalism by developing members to a higher standard and thereby reducing risk.



Advocacy: Is the essential resource for protecting private property rights, real property ownership and other real estate related issues and is recognized as such by the membership and the community.



Community Involvement: Significantly contribute to the community by finding new and innovative ways to create member involvement in organizations, activities and events.



Administration: A constant stability in membership and facilities for growth, innovation and future sustainability to benefit membership and employees.

Communication

Goal: To be a conduit of conversation through innovative methods with our members, staff, industry and community to foster understanding and a meeting of the minds.

Objective	Increase awareness and value of the Tucson Association of REALTORS®, its services and benefits to various segments within membership
Strategies	<ol style="list-style-type: none"> 1. Review current tools and metrics for effectiveness 2. Research communication platform options and tools 3. Develop two-way conversations <ol style="list-style-type: none"> 1. Foster ongoing conversations with brokers and use them as messengers 2. Engage the TAR Affiliate members in co-branding and co-advertising the benefits and value of using a REALTOR®
Objective	Promote public awareness of the value of using a REALTOR® and Affiliate
Strategies	<ol style="list-style-type: none"> 1. Implement an ongoing public relations campaign about the benefits and value of utilizing REALTOR® services 2. Develop an ongoing campaign of advertising and branding of TAR
Objective	The public and local media will see Tucson Association of REALTORS® as trustworthy, ethical, knowledgeable, and the primary source for housing-related information, issues, industry trends, and local statistics
Strategy	<ol style="list-style-type: none"> 1. Provide MLSSAZ data to the media and other key sources 2. Measure current effectiveness identifying gaps and opportunities 3. Identify strategy to work with partners providing most relevant, and current information (Top Producers, Trends, Schools)
Objective	Focus the public's attention on the positive contributions REALTORS® make in enhancing the livability and economic vitality of Tucson and Southern Arizona (individual REALTORS®, the Boards, and Committees)
Strategies	<ol style="list-style-type: none"> 1. Advertise and promote all community engagement activities of TAR members 2. Publicize community engagement projects and business/industry partnerships 3. Annually advertise the recipients of the REALTOR® of the Year, Affiliate of Year, & TRCF grant recipients. 4. Continue the use of social media through FB, Twitter, YouTube, LinkedIn using NAR talking points and relevant articles 5. Publicize consumer resources (i.e., website, Welcome Home website)

Regionalization

Goal: Development and implement a model to provide operational and support services to real estate related organizations.

Objective	Develop and implement a fee based service model to provide operational and support services to real estate related organizations and associations.
Strategies	<ol style="list-style-type: none">1. Create Regionalization Leadership Team (Reports to the TAR Board of Directors)2. Develop an objective analysis model for identifying and evaluating potential partners - Leadership Team3. Identify models and services currently available which could be supported by Regionalization4. Develop models and services for future growth
Objective	Develop Regionalization Plan, including communication, to gain internal support of organizations membership
Strategies	<ol style="list-style-type: none">1. Develop communication plan for membership, both local & future
Objective	Develop Strategy to service commercial industry with a commercial exchange
Strategies	<ol style="list-style-type: none">1. Identify current needs and opportunities in MLS2. Develop model for new commercial service using best practices in the industry3. Implement model and cost structure
Objective	Position internal organization for future opportunities and growth
Strategies	<ol style="list-style-type: none">1. Evaluate and implement change in association name2. Identify staff to lead efforts, as well as supporting staff3. Structure organization to lead and implement plans<ol style="list-style-type: none">a. Board leadershipb. Staffing

Emerging Trends

Goal: Identify opportunities and threats to the industry and develop strategies to foster innovation, education and protection to ensure members remain essential in the real estate transaction.

Objective	Establish an Emerging Trends Task Force made up of current committee chairs (or appointed committee representative)
Objective	Develop plan for defining and monitoring emerging trends, including outside industry and best practices on communicating these trends
Objective	Develop Broker Relationships
Strategy	1. Small independent needs assessment
Objective	Establish a schedule of educational opportunities on emerging trends for membership
Objective	Maximize efficiency, understanding and use of MLSSAZ and related products
Strategy	1. MLS Data 2. Property showings 3. Training
Objective	Identify, evaluate and address threats to the agents, the transaction or process of buying and selling
Strategy	1. Create a consumer facing campaign

Professional Development

Goal: Raise the bar of professionalism by developing members to a higher standard and thereby reducing risk.

Objective	Identify core real estate fundamentals required to enhance professionalism
Strategies	<ol style="list-style-type: none"> 1. Conduct member survey to establish educational needs 2. Develop task force to address core fundamentals and “next level” opportunities 3. Develop programs that enhance professionalism and core real estate fundamentals 4. Provide resources and education to Association members that emphasize the importance of professionalism 5. Develop designation and certification opportunities (ABR, CRS, GRI)
Objective	Explore mandating post license training for new agents
Strategies	<ol style="list-style-type: none"> 1. Develop a “new agent training” class or series that teaches basic skills to new members 2. Research the components of a required series 3. Develop task force to work with ADRE on changing educational requirements at the legislature
Objective	Develop “Best in Nation” education program focused on quality, relevant, business-building topics
Strategies	<ol style="list-style-type: none"> 1. Create awareness campaign regarding member benefits as it pertains to education 2. Conduct educational classes in conjunction with local partners 3. Conduct one large educational event each quarter 4. Continue to host classes that enhance member knowledge of the greater Tucson Market 5. Create a venue for members to request educational opportunities 6. Develop a “Raise The Bar” Quarterly education series
Objective	Emphasize education related to sustaining a successful and profitable business not only a real estate agent, but an independent contractor
Strategies	<ol style="list-style-type: none"> 1. Implement and grow fee based classes and opportunities 2. Develop external partnerships for opportunities

Advocacy

Goal: Is the essential resource for protecting private property rights, real property ownership and other real estate related issues and is recognized as such by the membership and the community.

Objective	Proactively impact local ordinances, laws and policy issues
Strategies	<ol style="list-style-type: none"> 1. Identify local issues and programs that are appropriate and use all resources available to include AAR or NAR Issues Mobilization grants 2. Utilize all communications resources to educate members about issues and policies that impact our members 3. Utilize resources such as Advocacy Everywhere to increase participation in Calls for Action 4. Establish a program to educate members regarding the benefits of utilizing the REALTOR® Action Center and encourage downloading of the REALTOR® Action Center app 5. Influence political outcomes at the city and county related to the ownership, use or transfer of real property, taxation, land use, water policy, insurance issues, etc. When possible, monetize the positive outcomes and consistently remind members of the importance of TAR to their businesses and financial bottom line
Objective	Support private property rights, housing and real property ownership by providing active campaign assistance for local political candidates that are friendly to REALTOR® Party issues
Strategies	<ol style="list-style-type: none"> 1. Identify pro-REALTOR® local candidates through continued usage of the candidate interview and endorsement process. Publish the endorsements inclusive of the rationale for each endorsement focusing on matters of importance to real property ownership and the real estate industry 2. Investigate the potential for utilization of independent expenditure funding and, if appropriate, apply for such funding from NAR and/or AAR 3. Foster relationships with local elected officials and offer information and support related to REALTOR® issues. Be the most sought after and trusted source of information for all issues related to the ownership, use or transfer of real property
Objective	Increase RAPAC participation and meet or exceed investment goals
Strategies	<ol style="list-style-type: none"> 1. Establish a RAPAC fundraising committee 2. Focus on, promote and communicate the value of RAPAC at every TAR event and actively seek additional opportunities to communicate the value of RAPAC to the members businesses 3. Plan and conduct a major investor event annually and ensure that major investors are provided with appropriate recognition throughout the year 4. Set goals to meet 3 tiers of investment success; participation, dollars Major Investors
Objective	Education for the public and media at least twice a year on TAR advocacy efforts
Objective	Maximize relationship with economic development organizations in region to promote growth in local economy

Strategies

1. Identify and invest in partners (time and money)
2. Provide resources to assist economic development efforts

Community Involvement

Goal: Significantly contribute to the community by finding new and innovative ways to create member involvement in organizations, activities and events.

Objective	Identify community activities and opportunities that are essential for promotion of TAR, MLSSAZ and TRCF
Strategies	<ol style="list-style-type: none">1. Identify "core" partnerships essential to home ownership2. Identify local events, large and small, providing best opportunity for promotion and involvement3. Develop annual plan for member engagement4. Develop operational policies providing clarity for efforts
Objective	Create plan to highlight and promote members contributions to the community
Strategies	<ol style="list-style-type: none">1. Survey current involvement of leadership and active members2. Identify and develop opportunities to promote the good will of members

Administration

Goal: A constant stability in membership and facilities for growth, innovation and future sustainability to benefit membership and employees.

Objectives	Facilities – To continue to capitalize on TAR facility to maximize productivity and grow asset value
Strategies	<ol style="list-style-type: none"> 1. Develop comprehensive building improvement plan document. This document would be used to monitor large improvement projects over the next three years 2. Establish a building committee, made up of members, that would assist with developing and monitoring of the comprehensive building plan 3. Utilize building committee (if appropriate) to assist in a redesign of the large office space in the center of the building 4. Develop a comprehensive building and equipment maintenance tracking spreadsheet to ensure contracts are renewed when appropriate 5. Train Accounting Associate on bid gathering, contract renewal process, and board presentation of facility bids/maintenance agreement proposals
Objectives	Human Resources – To develop the Human Resources function as a strategic business partner to ensure employee productivity and performance are a priority
Strategies	<ol style="list-style-type: none"> 1. Review of all job descriptions to ensure accuracy annually 2. Review and rewrite of Employee Handbook where necessary 3. Maximize new hire training 4. Develop a comprehensive incentive and reward plan for employees to reduce turnover rate and promote growth 5. Work with department managers to ensure a succession plan document is in place 6. Rewrite of employee performance appraisal document 7. Develop a comprehensive plan for employee education and growth in roles
Objectives	Finance – Continue to be a strategic partner with the Boards of Directors to mitigate risk, promote innovation, provide accurate, timely financial information, and enhance transparency
Strategies	<ol style="list-style-type: none"> 1. Develop Accounting Associate to the point where they can prepare for and answer auditor questions during the annual audit 2. Review of accounting policy handbook to include changes for Ramco 3. Review of front desk handbook to ensure it is updated for Ramco 4. Review of chart of accounts for all companies to eliminate inactive (old) accounts and modify descriptions where needed to ensure the description reflects the account activity 5. Train Accounting Associate on budget process. Explore budgeting software package as a possible replacement for Excel 6. Develop financial education for board members 7. Develop forecasting models for future membership changes 8. Develop and implement a plan for financial and asset growth 9. Maximize dues and non-dues revenue opportunities