



10575 N. 114th St. #113
Scottsdale, AZ 85259
Phone: 480-368-8100
www.clareity.com

Planning Report for TAR and TARMLS

Strategic Planning Retreat
August 12-13, 2010

Tubac Resort

Facilitators: Gregg Larson and Matt Cohen

*Prepared for the Tucson Association of REALTORS® (TAR) & TAR MLS
August, 2010*

*(Approved by the TAR Board of Directors on November 18, 2010; Approved by the
TAR MLS Board of Directors on December, 17, 2010)*

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Agenda for Tucson Strategic Planning Session

August 12-13, 2010 – Tubac Resort

Thursday August 12, 2010 – 9:30am – 5:00pm

9:30-10:00	Gathering Time / Coffee
10:00-10:30	Introductions and Objectives
10:30-11:00	State of the Industry Update by Clarity
11:00-11:15	Assessment by CEO
11:15-11:30	Morning Break
11:30-11:45	Alignment Survey – Organization and Leadership
11:45-12:15	Mission Statements – TAR / TARMLS
12:15-1:00	Environmental Scan for 2010-11
1:00-2:00	Lunch / Break for emails, phone calls etc.
2:00-3:00	“SWOT” – Examine TAR and TARMLS Strengths, Weaknesses, Opportunities & Threats
3:00-5:00	Review of 2010 Business Plan Organizing and Prioritizing Initiatives: discussions, decisions, ranking and planning of top priorities
5:30	Social Hour followed by Dinner

Friday August 13, 2010 – 8:30am – 2:00pm

8:30-9:00	Gathering Time / Buffet Breakfast Served
9:00-9:30	Review and Commit to Priority Initiatives
9:30-11:00	Strategic Initiatives Objectives and Goals Goal Assignments and Timelines <i>Note: portions of this may be done in two groups</i>
11:00-11:15	Break
11:15-12:30	Strategic Initiatives (continued) Objectives and Goals Goal Assignments and Timelines
12:30-2:00	Working Lunch – Wrap-up

Participants

1. Bob Herd
2. Jill Knox
3. Cathy Erchull
4. Tim Bott
5. Dan Santa Maria
6. Laura Mance
7. Rosey Koberlein
8. Greg Hollman
9. John Mijac
10. Nicole Brule-Fisher
11. Billy Mordka
12. Gary Best
13. Philip Tedesco
14. Wes Wiggins
15. Cheri Meadows
16. Annalisa Moreno
17. Steve Huffman
18. Andrea Ballard

Facilitators: Clareity Consulting – Gregg Larson, Matt Cohen

Alignment Survey

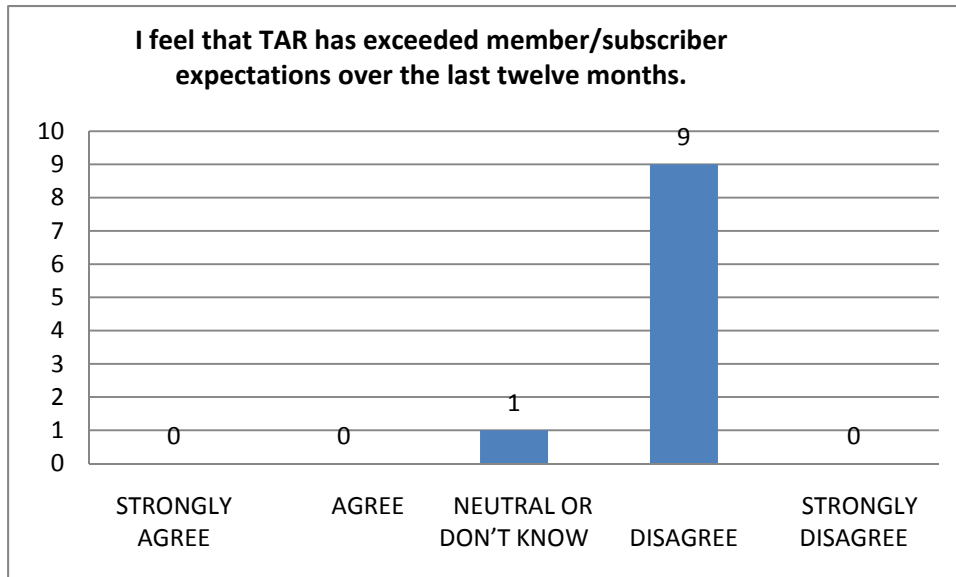
“We discovered that the most impressive companies we examined - those that were aiming for more than a little improvement and succeeding - were asking themselves a different question than that of other organizations: They weren’t asking ‘How can we do that faster?’ or ‘How can we do what we do better?’ or ‘How can we do what we do at a lower cost?’ Instead, they were asking

“Why do we do that at all?” – James Champy, Reengineering the Corporation

A QUICK SURVEY:

Please indicate your answer by circling the most appropriate answer. Please answer the question based upon the Board of Directors you serve on (Association or MLS).

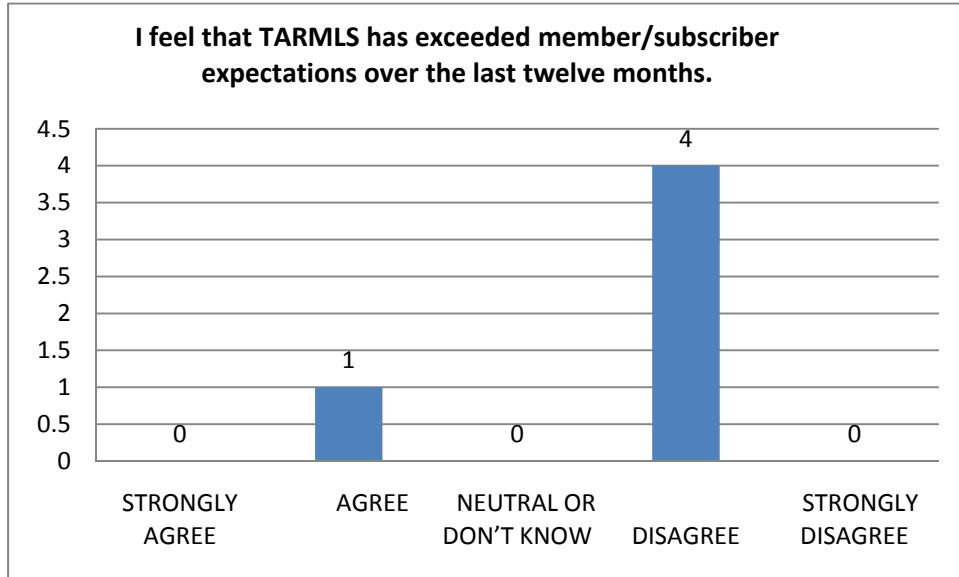
1. I feel that TAR/TARMLS has exceeded member/subscriber expectations over the last twelve months.



Disagree: Feedback from members, heard on the street. We’re doing a good job but member perception isn’t there. If someone was to ask me where our dues go, I couldn’t give them a list of services.

Neutral: We excel in some areas, not in others. The communication is not there – our education department is great but members don’t know it.

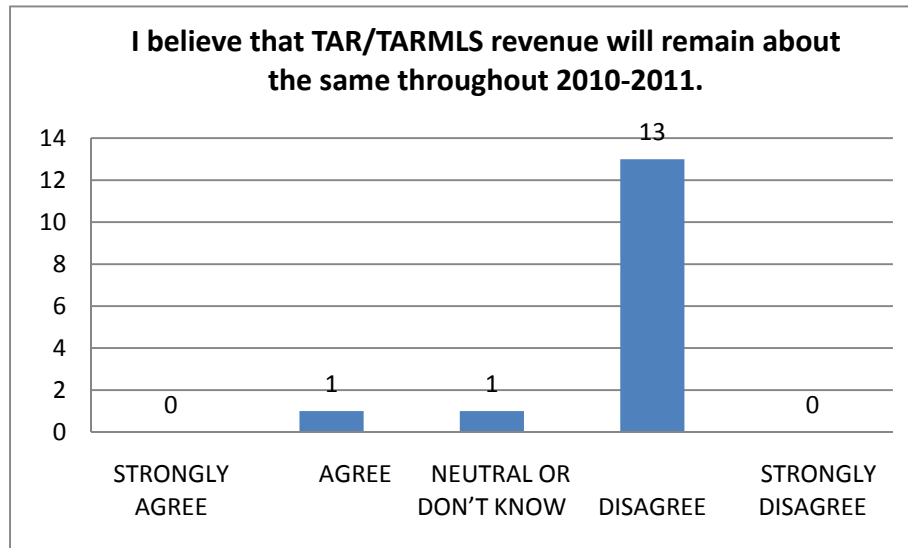
Response: Education – we’re not providing something they can’t get somewhere else. Response: I disagree, there are speakers we’ve brought in you couldn’t see elsewhere. What should we be giving the membership for their dues money?



Agree: I don’t know what member expectations were in a transition in our software. They know afterward they don’t like transitions, but that’s not an expectation. In retrospect, they mostly agree that it went pretty well. Most folks say things are better and went better than expected.

Disagree: I’ve heard from a lot of the membership, and the expectation was the conversion would be smoother, easier, better, faster than we did. From the feedback we received, we did not. In how we responded to membership during the process, personally speaking, we could have done a better job.

2. I believe that TAR/TARMLS revenue will remain about the same throughout 2010-2011.



Agree: We're going to see a drop in membership slightly – a lot leaving and coming in. Phil's cuts will help a lot.

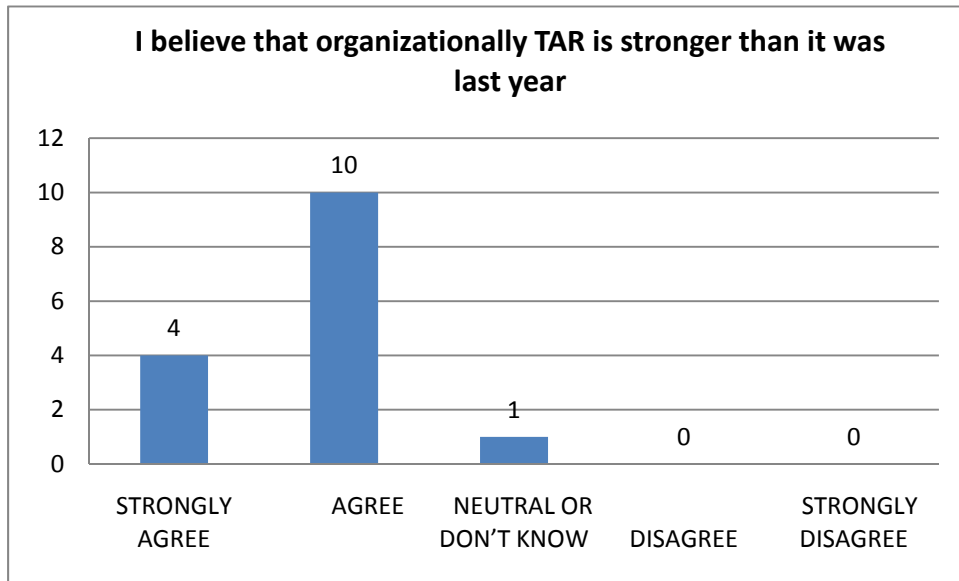
Disagree: The economic environment is very difficult. This is the first time I had a client sit in a public place and start crying about circumstances. I'm having agents call me seeking advice on what they should do – not from inside my company. Two have approached me this week concerned about what they should do. If Phil is successful and you generate revenue we'll be fine, otherwise we'll go backwards. I don't think revenue will be down *dramatically* because we have the strongest person with a history of association management since I've been a volunteer. He knows what to do and he's demonstrated that in six months. I'm impressed with the way the staff has responded to conditions and how Phil has addressed things. It's impressive because the customers you are serving are stressed more than I have ever seen them.

Disagree: I think each of these questions is two-fold. I would like to suggest that we look at them as the two organizations. One is a volunteer organization and the other is a profit-making organization. We should all vote twice – one for MLS, one for the Association. MLS is a fee for service.

Disagree: The practical reason for that is that the real estate professional wage is growing closer to minimum wage. I know four agents this week that went to do something else. People want a steady paycheck.

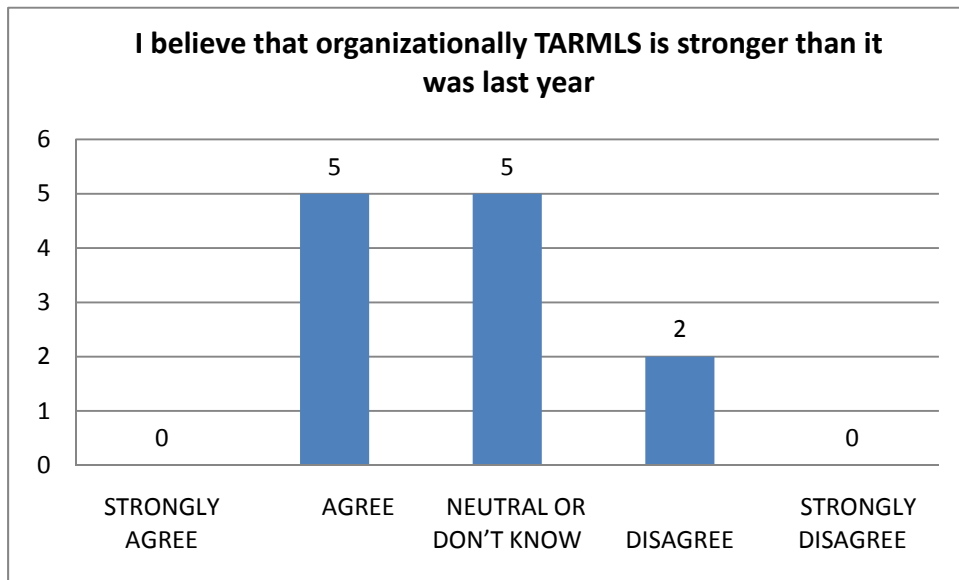
Disagree: I think the whole world and this country is going through something as dramatic as the industrial revolution. Jobs are going somewhere else. That's what's happening to our agents. "I'm too scared of this world to make a decision right now" and that will continue for a long time.

3. I believe that organizationally TAR/TARMLS is stronger than it was last year.



Agree: We have a CEO. Good leadership.

Agree: We've cut from our budget. People saw the world for what it was and took action.



Agree: I was surprised you took a cutting-edge decision to make a shift in the MLS. You knew there would be stress and you did it anyway – that's great leadership.

Agree: We made a decision that had to be made.

Agree: The new CEO was a big help, better communication. We are fulfilling what we say we want to do – to give our members the best tools.

Weaker: You're only as strong as members perceive – on the MLS side we've stubbed our toe several times on the conversion, communicating expectations. I don't believe we are through that. Increasing of fees...Poor statistical reporting. That goes to communication.

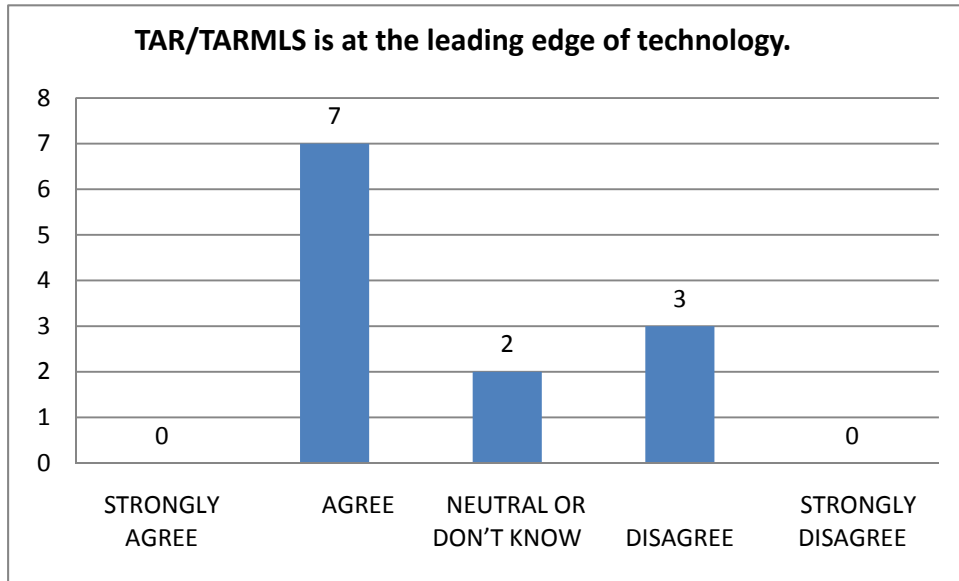
Response: You can never satisfy 100% of the people. We're probably up in the 70% satisfied with the conversion. My thing is, I agreed because MLS is listening to participants. Rapattoni was not the one they could go to and say, "We need this change," and get it done.

Weaker: "You don't know you are out of shape until you start running." We were out of shape. I appreciate Wes' honesty that it could have gone better. I have agents that are starting to get it and realize that we will be better off.

Response: No disrespect to Laura's choice of words, but we didn't anticipate the issues that the select group of people were expecting. We should have told them that this is going to be better than what we had and it will be expandable to your personal needs. We have the best technology committee anywhere in the U.S., and we bought into the program so enthusiastically that we overlooked the fair warning to the members that we serve.

Stronger: I think if you were to talk to agents across the board they would feel different from what we think. Some people may have answered not for themselves but for the members.

4. TAR/TARMLS is at the leading edge of technology.



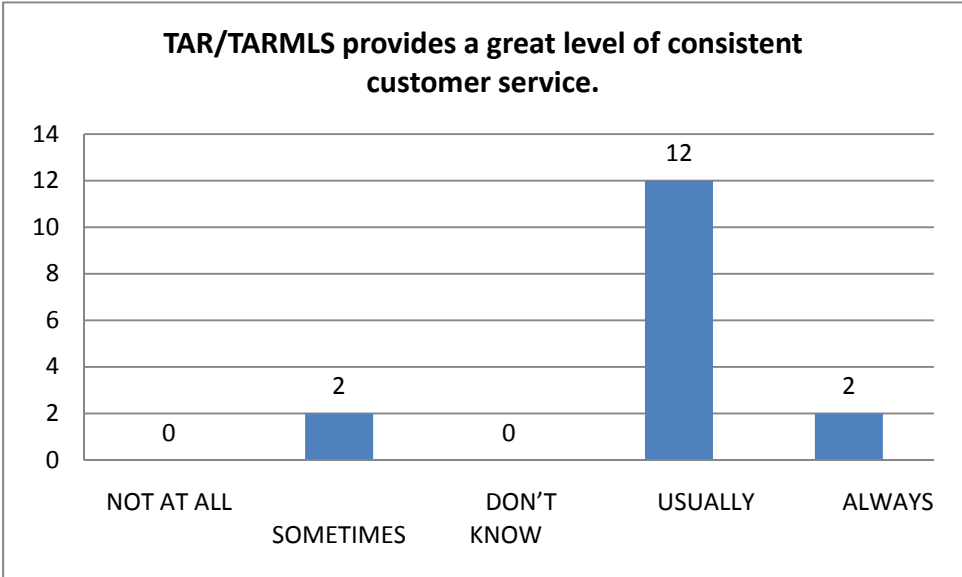
Sometimes: We have some leading technology but not it all. It's changing so rapidly that we couldn't have the best everywhere.

Usually: We make an effort to be aware of technological advances. The office itself, staff upgrades computer systems. They use Skype for interviews. We've done meetings with phone conference calling. We're making an effort.

Response: I think we have a serious lack on the web site for the association. It's terrible!

Response: Membership management system could be improved.

5. TAR/TARMLS provides a great level of consistent customer service.

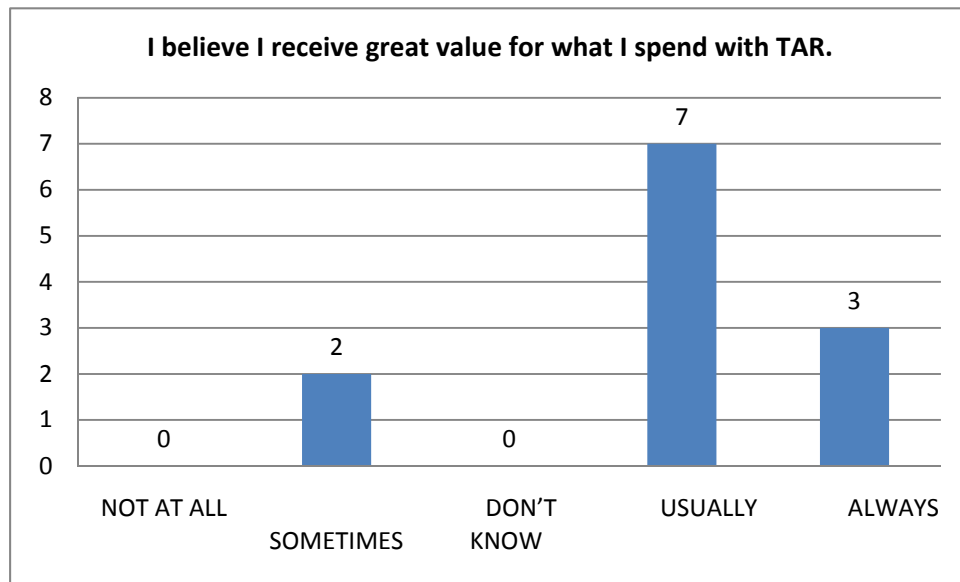


Sometimes: A great level – the bar is pretty high. We’re working toward it.

Usually: Staff is 99.9% spot on, answering the phone, dealing with issues, responding to committees and the Board. When there’s a problem with a staff person, action is taken.

Sometimes: I’ve had a couple of staff liaisons and it hasn’t always been great. Recently changes have been made for the positive. Staff behind the desk is always helpful.

6. I believe I receive great value for what I spend with TAR/TARMLS.



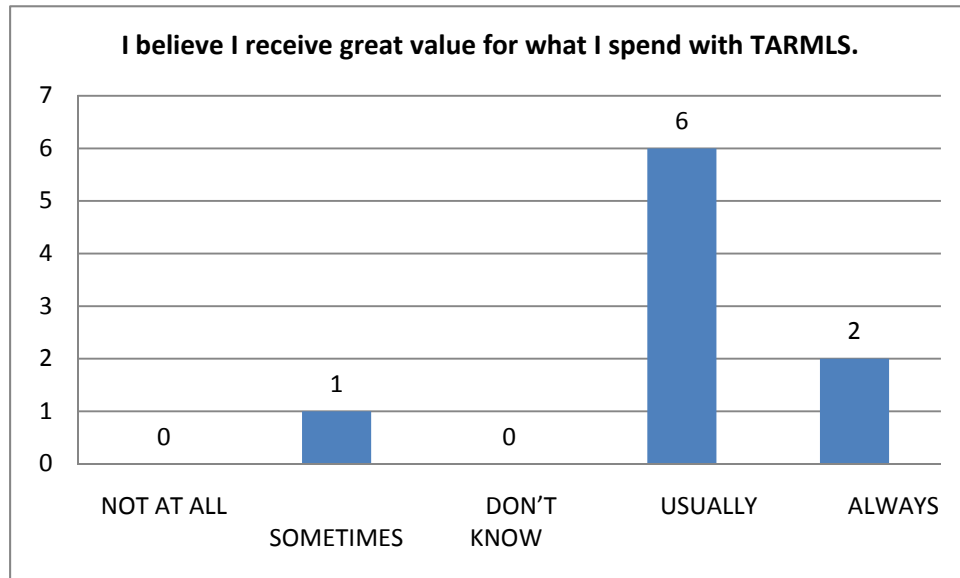
Sometimes: I believe I have great value, but the members in general might not. Do our members see the value? As mentioned earlier, they may not. That's lack of communication – a lack of showing them the value. Our members don't realize what they are getting for their dollar.

Sometimes: I think there would be a better perception of value if there was a menu of services. For example, I don't want free education because I get it elsewhere; it has no value to me. Should we consider a fee for services approach?

Usually: Have we recently asked members what they want to see the association give them?

Usually: I'm not sure I even know what another association has to offer – what we don't offer but should. I've been making an effort to go to offices to ask agents what they need from the association. Mostly I've listened to complaints – no one says something positive "This is what I need." They may not know.

Usually: The professionalism and marketing that the National Association of REALTORS® is putting forth – the recognition of true professionals – that's tremendous for what dues are paid.



Usually: I looked from a business person’s perspective. A retailer has to spend on a location and inventory, with a loan. We pay a few hundred dollars per year for a few billion dollars of inventory in our lap.

Sometimes: It has to go back to the members. We just had a subscription fees increase. How many complaints did we get? I think it’s great, but the members complained. Value wasn’t communicated.

Response: We received FIVE emails about the fee increase.

Always: We are the lowest-priced MLS – less than, or the same, as anyone else in the state. If people don’t know you are below average you need to communicate that. What got people riled up is that people who opted out of emails didn’t get the invoice. Then they got a fee. There should be NO opt-out of emails for billing purposes. We should survey members – we should ask, if we had fewer services, would you pay lower dues? That needs to be something to look at today. Maybe we don’t go in that direction but maybe we do.

Usually: I picked usually, members don’t. To carry the word REALTOR®, we must maintain a standard. We have to be careful about cutting things too much.

Mission Statements

TAR Mission Statement:

The Tucson Association of REALTORS® will defend private property rights, promote a positive regulatory climate and elevate the professionalism and public perception for our members.

TARMLS Mission Statement:

The Tucson Association of REALTORS® MLS will provide our members state-of-the-art cost effective tools and accurate information to better serve the consumer and advance professionalism.

Environmental Scan for 2010-11

Economic

It's hard to read the paper and talk 'good' to people.

Jobs will affect housing – we have to lead with jobs. Our educational system goes hand in hand with that.

Demographic

We've got serious issues with SB 1070 (immigration bill) in terms of people feeling safe to move here and perception of our community. We as a community need to deal with this – it's divisive.

It's a state issue – it's the Arizona Association of REALTORS®' sandbox.

Political

Local level – government is messed up, no one can work together, too many golden calves. There's not a vision of the future. Some people will not move to Tucson or an area because of this.

Our Association has opportunity – our region is low wage part of the state – there are questions about the education system that impacts business relocation and homeownership – there are questions about government. The alphabet soup of community groups – we can provide leadership. But the discussions now are the same ones from ten and twenty years ago. They can identify problems, but not the solutions.

We have to fight over obstacles over who we can give school supplies to – it's political.

There are grass roots efforts to elevate people's visions. I hope that as an association we would have a seat at that table.

Legal / Regulatory

Everyone's trying to get in our pockets. Last year we did Proposition 100 on transfer taxes and people still tried to pass it.

Financial reform – elements are critical to this industry. Depending on how rules and regulations are written by staff – affiliated business issues may have serious impact.

Professional service taxes.

It sounds from these past few environmental segments that there are political initiatives both nationally and locally.

Technological

Social media in general – and how to incorporate it.

A very small percentage of members interact technologically.

The Internet as a whole is changing how the world works – eliminating jobs at a rapid pace. It will permeate everything including our industry. Google and others are looking at Real Estate as a source of revenue. What if Google offered free MLS?

Search tools – RPR, Move - these can have an impact on the organizations and membership next year.

Mobile applications for Real Estate will come. It will make a big difference as people are walking around and say, “Show me everything for sale in 500 feet.”

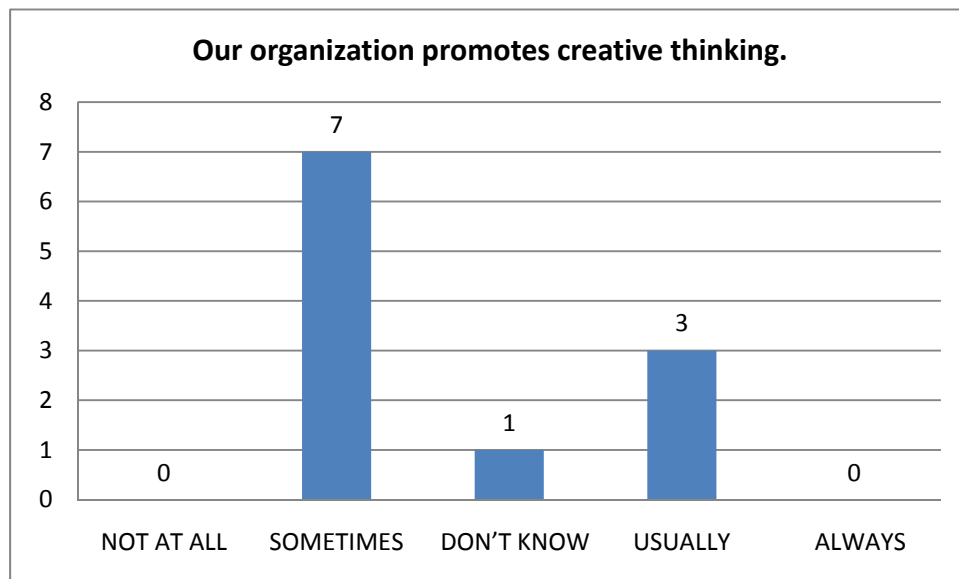
International

With the economy –more international investment – we should provide educational opportunities for members.

SWOT – Strengths, Weaknesses, Opportunities, Threats



“The best way to predict the future is to invent it.” --Alan Kay, Apple Computer



What do you think is **THE SINGLE** biggest external threat to the continued success of TAR in 2010-2011? And TARMLS?

- TAR
 - Consumer confidence
 - Government legislation
 - Google
- TARMLS
 - Regionalization – if we don't do it right
 - RPR

What do you think is **THE SINGLE** biggest internal threat to the continued success of TAR in 2010-2011? And TARMLS?

- TAR
 - Lack of leadership support
 - Membership apathy
 - Opting out (jokingly)
 - Finding a compelling way to communicate. (Look at ARMLS magazine for starter! It's flashy and pretty. The web site isn't compelling. There's no MLS magazine.)
- TARMLS
 - Disconnect with the membership feeling confident in the organization; missing level of trust.
 - We don't have a lot of new talent in the ranks; there's a lack of participation. We can encourage that, getting agents to serve on committees. I don't see effort to pull them back in. From a small broker perspective, there's a feeling that "What's the point? The large brokers run the show." That's just a perception.

- Both
 - Gridlock – people who want one thing versus people who want another. People who want the Association to provide everything versus not.
 - MLS and TAR board need to work toward the same common goal, with a unified voice.
 - We need a Young Professionals Network (YPN).

What was **THE SINGLE** biggest success of TAR last year? And TARMLS?

- We hired Phil!
- The staff this year needs to be acknowledged. They got us through a tough period.

What was **THE SINGLE** biggest failure of TAR last year? And TARMLS?

- Proposition 200 – we took a leadership role and didn't prevail; there was a backlash.
- MLS: the way we transitioned – could have been smoother. We had lack of training. Flex people gave a synopsis and not training. There wasn't enough time for training. Response: every time I called, I got what I needed.
- MLS: we failed on not teaching people what a conversion is.

List three **strengths** of TAR :

- Staff and CEO
- Committed volunteers
- Resources – facility, finances
- Political influence
- Code of Ethics, Professional Standards

List three **weaknesses** of TAR :

- Communication. REALTORS® Don't Read
- Lack of focus, alignment of goals

List three **strengths** of TARMLS :

- Engaged volunteers – the boards, the committees, everybody
- We're on cutting edge of MLS with FlexMLS.
- Staff, again.
- Wes brings national perspective and is respected nationally.
- The MLS is responsive to new technology, needs and desires; open to change
- Wes' constant pursuit of technology and keeping in touch with everyone; not taking personal time.

List three **weaknesses** of TARMLS :

- Cost could be a weakness
- Communications
- Governance structure. MLS board needs to be expanded – it's so small that it's iffy as to whether you can get a quorum.
- Lack of documentation on system and statistical reports; impacts credibility.
- Lack of follow-through with violations and collections of fines.

“Management works in the system. Leadership works on the system.”

--Stephen R. Covey

Critical Success Factors

‘Critical Success Factors’ are signposts that provide us with directions to the vision...

EXAMPLES OF CRITICAL SUCCESS FACTORS

1. Cost of Services (0)
2. Scope of MLS Services and Data Content (1)
- 3. Customer/Member Communications (13)**
4. Governance (1)
- 5. Government Affairs and Lobbying (5)**
6. Public Web Site (3)
7. Accuracy of TAR MLS Data (2)
8. Security of MLS and Member Data (1)
9. Reliability of TAR System(s) (1)
10. Financial Resources and Reserves (1)
11. Decision Making Capabilities (1)
12. Big Broker Issues/Opportunities (0)
- 13. Leadership Development (9)**
- 14. Community Outreach (4)**
- 15. Member/Subscriber Sustainability (8)**
16. Others?

Exercise: Establish and Rank the TAR/TARMLS Critical Success Factors

- 1. Customer/Member Communications (13)**
- 2. Leadership Development (9)**
- 3. Member/Subscriber Sustainability (8)**
- 4. Government Affairs and Lobbying (5)**
- 5. Community Outreach (4)**

Review of 2010 Business Plan Current Initiatives and Status

ASSOCIATION COMMITTEES

Education Committee

Initiative	Status
2010.1 – Offer continuing education classes at a price that reflects the strategic priority of providing education as a value to members.	We offer free CE and discounted designation courses. Need to continue and expand Tucson specific classes. Should TAR continue to subsidize? There is disagreement. Members have trouble paying for courses and education is an added value to member. But its member money that we’re subsidizing classes with. Is the value diminished because of the cost? Designations should be prioritized. <i>Continue, but refine, focusing on designation subsidy over others.</i>
2010.2 – Educate membership on the benefits of obtaining an NAR designation.	<i>Continue.</i>
2010.3 – Continue to explore Tucson specific classes that enhance knowledge of the Tucson market.	I.e. zoning issues. <i>Continue.</i>
2010.4 – Promote interactive education.	I.e. webinars. We now have online education and we get discounts that people aren’t aware of. <i>Continue.</i>

Public Relations (Member Outreach) Committee

2010.5 – Maintain an up to date website that provides timely information for members and consumers.	Can we pay out early?
2010.6 – Continue to improve the e-update and develop strategies for communicating with members; benchmark and record how often members’ access media and demonstrate measurable improvement.	We have ways to track if people receive emails.
2010.7 – Increase the number of affiliate partners by 10% of current participants.	Working on a plan currently.
2010.8 – Continue to reach out to existing ISCs like CCIM, WCR, CRS, etc.; host at least two meetings with ISC leaders.	Ongoing.
2010.9 – Provide at least two broker meetings and four member Town Halls (including the annual member meeting), and three member mixers where the Association will update brokers and members on specific issues and gather input.	We had spring meeting; another town hall scheduled by end of year.
2010.10 – Successfully sponsor the Tucson Association of REALTORS® Shootout; Assist organizers in achieving a	Done.

successful event that highlights the role of REALTORS® in the community.	
2010.11 – Successfully sponsor the “Stuff the Bus” campaign; benchmark total number of donations to schools.	Done.
2010.12 – Use new technologies (viral marketing, you tube, etc.) to promote the Association.	Using Facebook, Twitter, LinkedIn.
2010.13 – Develop strategies to enhance media relationships and make the Association “ <i>The Voice of Real Estate in Tucson.</i> ”	Media is contacting TAR more than they used to.

REALTOR® Risk Management Committee

2010.14 – Monitor and inform REALTORS® regarding any and all risks that affect their business with at least 12 articles in the e-update and one article in each issue of the Association magazine or successor publication promote applicable educational offerings in each article.	Periodically publishing. Consideration should be given to revising the format.
2010.15 – Monitor and inform REALTORS® regarding RESPA developments; work with the Education Committee to sponsor two RESPA Roundtables involving the Affiliate members.	Plan to put out monthly updates.
2010.16 – Monitor and inform REALTORS® regarding anti-trust developments; offer at least one Anti-trust class.	No anti-trust class this year.
2010.17 – Develop a schedule to review all Association forms at least every three years to ensure compliance with current practice and inclusion of risk related issues.	All forms reviewed but one.

Government Affairs Committee

2010.18 – Engage local governments in efforts to build a sustainable community.	Successful via green committee.
2010.19 – Obtain association representation on any appropriate public or private body deliberating topics that relate to water, urbanization, transportation and land use.	We’re not having an impact.
2010.20 – Continue to collaborate with other business groups in the Southern Arizona Business Roundtable; implement collaborative strategies that promote the Association agenda.	We have an amicable relationship.
2010.21 – Develop a database of REALTOR® members on community boards and grow number of members on boards.	Staffing issue, not addressed. Moved to ‘Staff responsibility for 2011 Goal Assignments.
2010.22 – Increase the number of REALTORS® on county and city public boards by 10% over the previous year.	Staffing issue, not addressed. Moved to ‘Staff responsibility for 2011 Goal Assignments.
2010.23 – Achieve the Annual RAPAC goal; create a culture of supporting RAPAC and increase the total	Not on target.

number of members participating by 10% over previous year.	
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Should we get involved with specific candidate races? We offend membership by endorsing candidates. We create enemies when we endorse a losing candidate. CONVERSELY, it improves community involvement and influence. The value is once you endorse someone, it means something. If they are afraid of you, you can have influence after the election. We should only endorse when we are willing to phone, walk and knock. But if you stop your endorsements, you lose your clout. *No change, just communicate why we endorse a candidate; implement follow-up on endorsements and make our process better.*

Housing Opportunities Committee

2010.24 – Promote the NAR Home from Work Program (<i>now Employer-Assisted Housing</i>) to public and private employers.	On the backburner because NAR overhauled this program but still valuable.
2010.25 – Provide information about housing opportunities throughout Tucson through seminars, Summits, or online through the Association’s website.	We’ve had a difficult time with housing fairs – consumers are done with it and there’s low attendance. This may not be the right format. Perhaps a consumer resource guide online? Perhaps a resource guide on the Foundation site?
2010.26 – Review the New Member Education program to ensure curriculum compliance with fair housing and diversity issues.	Ongoing. Moved to ‘Staff’ responsibility for 2011 Goal Assignments.
2010.27 – Maintain the financial literacy program for high school students.	Very successful. Suggestion: making the award at our awards banquet. Get video of awards and promote?

Property Management Committee

2010.28 – Sponsor property management focused education.	Three offerings to date, well attended.
2010.29 – Provide input on forms to Tucson Association of REALTORS® Forms Committee.	Being done.
2010.30 – Provide input on MLS rental system relative to property management issues, including historical rental data applications.	Being done.
2010.31 – Provide legislative input and recommendations on property management–related issues.	

Operations Committee

2010.32 – Continue to develop leadership training programs; develop processes for identifying future leaders.	Still a high priority.
2010.33 – Define, explain and promote what a leadership model is to all association stakeholders.	Nothing has been done on that except during orientation.

MLS COMMITTEES

MLS Technology

Initiative	Status
MLS 2010.1 – Facilitate change to FlexMLS software.	Completed July 2010
MLS 2010.2 – Implement authenticated access to MLS. Identify and incorporate Green Valley features into MLS.	Will become important to facilitate data shares. We still need to do that but I'd rather back off because we have new opportunities to develop relationships with them.
MLS 2010.3 – Work with Commercial Committee to improve MLS functionality as related to Commercial practitioners.	Ongoing. Forms are developed; in approval process. Will consider development of CIE, attractive to new commercial members.
MLS 2010.4 – Research and implement best solution for providing tax data to MLS subscribers.	Under a 1 year auto-renew with Courthouse Retrieval. RPR will be evaluated.
MLS 2010.5 – Identify 3 rd party technologies that would enhance Tucson MLS.	Ongoing. Especially if there is revenue opportunity. It ties into a la carte approach there is support for. Included as a 'Staff' responsibility for 2011 Goal Assignments.

MLS Standards

MLS 2010.6 – Clarify and update MLS Rules and Regulations.	Mostly done, but ongoing.
MLS 2010.7 – Review Violations and Fines; develop procedure for addressing repeat violators.	<i>Are fines being collected?</i>
MLS 2010.8 – Take ownership of, update, and score MLS test for members who are out of area.	Done.
MLS 2010.9 – Define procedures for addressing user reported violations.	<i>Are fines being collected?</i>

MLS Commercial

MLS 2010.10 – Clarify and update MLS Rules and Regulations as related to Commercial.	
MLS 2010.11 – Review Violations and Fines; develop procedure for addressing repeat violators.	
MLS 2010.12 – Identify 3 rules to be added to error checking software.	Do not have. All three tax providers provide software for this – to be evaluated.
MLS 2010.13 – Take ownership of, update, and score MLS test for members who are out of area.	
MLS 2010.14 – Ensure forms necessary for Commercial within FlexMLS are created and available to membership.	Ongoing.
MLS 2010.15 – Implement best practices for Commercial within FlexMLS, research feasibility of CIE.	Ongoing.

TAR MLS Board of Directors

Implement FlexMLS as Tucson MLS software	Completed
MLS 2010.16 – Increase non-dues revenue	
MLS 2010.17 – Examine MLS effectiveness to Commercial brokers; determine if separate portal is warranted.	
MLS 2010.18 – Ensure policies are updated, consistent with TAR where applicable.	PAG in progress

Strategic Initiatives, Objectives and Goals

Association Strategic Initiative 1 – Communications

- 1.1. Create custom communications to specific constituents/groups; including Broker and Manager specific communications (include TAR calendar items), and communications designed for industry niches and/or specialties **(Staff)**.
- 1.2. Implement a “CEO Council” office liaison group; update broker representatives, who then update their offices at their regularly-scheduled meetings **(Chief Executive Officer)**.
- 1.3. Segment communications by ward / geography **(Staff)**.
- 1.4. Communicate why TAR endorses candidates **(Government Relations Committee, Candidate Ballot Measures Task Force, Staff)**.
- 1.5. Communicate benefits of MLS to MLS subscribers **(Staff)**.
- 1.6. Go to the membership (Office Visits); do not expect them to come to Town Halls **(Board of Directors)**.
- 1.7. Have staff available at Friday morning Tour meetings to keep communications open **(Staff)**.
- 1.8. Give the Board of Directors 10-15 contacts apiece – members to call or meet with face-to-face **(Board of Directors)**.
- 1.9. Summarize high points of NAR and AAR communications for members **(Staff)**.
- 1.10. Promote members liking or ‘friend-ing’ the organization via social networking **(Member Outreach Committee, Staff)**.
- 1.11. Develop and communicate the value of membership using a standardized approved “pitch” **(Member Outreach Committee)**.

Strategic Initiative 2 – Leadership Development

- 2.1 Increase subsidy for designation classes **(Staff)**.
- 2.2 Create a Young Professional’s Network (YPN) **(Member Outreach Committee, Staff)**.
- 2.3 TAR functions – promote volunteerism and follow up; Take descriptions of volunteer opportunities to office visits and/or outside meetings **(Board of Directors, Staff)**.
- 2.4 Add volunteer opportunities and application to web site **(Staff)**.
- 2.5 Have managers identify those with leadership potential – quarterly breakfast with the CEO, invitation only – then recruit **(Chief Executive Officer)**.
- 2.6 Continuously identify, and involve potential future leaders for the committee and Association **(All Committees, Board of Directors, Chief Executive Officer, Staff)**.
- 2.7 Improve the ‘*Pathways to Professionalism*,’ Recruit successful members to be a part of the program as guest speakers **(Operations Committee)**.

Association Strategic Initiative 3 – Member/Subscriber Sustainability

- 3.1 Develop a recruiting and retention plan **(Staff)**.
- 3.2 Explore a payment plan for dues and fees **(Staff)**.
- 3.3 Expand on commercial, new home sales, and property management memberships by creating value for these segments of the membership **(Member Outreach Committee)**.
- 3.4 Explore creating a new member type – auxiliary membership (NAR Game Changer Program) **(Member Outreach Committee)**.
- 3.5 Explore offering services to other parts of the state **(Staff)**.

Association Strategic Initiative 4 – Government Affairs and Lobbying

- 4.1 Create new government affairs committee structure with more geographic representation (minimum 1 per ward, supervisory district, and regional cities and towns) **(Chief Executive Officer, Staff, Government Affairs Committee)**.
- 4.2 Increase representation on local government boards and committees **(Staff)**.
- 4.3 Set up website listing members and their community organization involvement; link to the organization websites; Promote members via newsletters, Facebook, etc. **(Staff)**.
- 4.4 Promote and strive to meet Annual RAPAC goal **(Staff)**.
- 4.5 Enlist a dedicated member (or members) to promote RAPAC **(Government Affairs Committee)**.
- 4.6 Promote the payment plan for RAPAC **(Government Affairs Committee)**.

Association Strategic Initiative 5 – Community Outreach

- 5.1 Reorganize the Public Relations Committee to do Member Outreach only (rather than fund dispersal) **(Board of Directors)**.
- 5.2 Implement renaming this committee “Member Outreach” **(Board of Directors)**.

MLS Strategic Initiative 1

- MLS 1.1: Explore implementing an “a la carte” model of services **(MLS Board of Directors)**.
- MLS 1.2: Survey membership annually regarding satisfaction to set benchmarks **(Staff)**.
- MLS 1.3: Communicate benefits of MLS to MLS subscribers **(MLS Board of Directors, Staff)**.
- MLS 1.4: Go to the membership (Office Visits) **(MLS Board of Directors)**.
- MLS 1.5: Continuously identify, and involve potential future leaders for the committee and Association **(All Committees, MLS Board of Directors, Chief Executive Officer, Staff)**.

Foundation Strategic Initiative 1

- TRCF 1.1: Explore implementing an appropriate corporate structure **(Tucson Charitable Foundation Board of Directors)**.
- TRCF 1.2: Develop a mission statement / purpose **(Tucson Charitable Foundation Board of Directors)**.

Organizational Structure

Arizona Association of REALTORS® (AAR) Directors		
National Association of REALTORS® (NAR) Directors		
Tucson Association of REALTORS® (TAR) Board of Directors		
Candidate Ballot Measure Taskforce (CBMTF)		Taskforce
Education Committee	The RESPA sub-committee falls under the Education Committee.	Standing Committee
Government Affairs Committee		Standing Committee
Green Committee		Committee
Housing Opportunities Committee	The Habitat for Humanity and Housing Education sub-committees both fall under Housing Opportunities Committee.	Standing Committee
Nominating / Credentials Committee		Standing Committee
Operations Committee		Executive Committee
Property Management Committee		Committee
Public Relations Committee	Change to Member Outreach Committee	Standing Committee
REALTOR® Risk Management Committee	The Forms sub-committee falls under the REALTOR® Risk Management Committee.	Standing Committee
Strategic Planning Taskforce		Taskforce
TAR MLS Board of Directors		
MLS Technology Committee		Standing Committee
MLS Standards Committee		Standing Committee
MLS Commercial Committee		Standing Committee
Tucson REALTORS® Charitable Foundation Board of Directors		

Definitions:

Committee – a group appointed to oversee a specific area. Has a chair and/or vice-chair. May have regularly scheduled meetings. Maintains minutes.

Sub-committee – a group appointed to oversee a specific area within the responsibilities of the committee under which it falls. Has a chair and/or vice-chair. May have regularly scheduled meetings. Maintains minutes.

Taskforce – a group appointed to accomplish a specific task. Meets only as needed to accomplish that task. Has a taskforce leader. Sunsets when the task is accomplished.

Arizona Association of REALTORS® (AAR) Directors: A.A.R. Directors represent Tucson and A.A.R.'s Region at Arizona Association of REALTORS® Meetings.

Candidate Ballot Measures Taskforce (CBMTF): Determines Association's position as it relates to candidate and issues endorsements and financial contributions; holds forums for local elections.

Education Committee: Recommends courses and presentations that are pertinent to the industry and current trends for our membership's knowledge and growth in professionalism and financial success. The Education committee also recommends new classes and curricula for REALTORS®, and is responsible for assisting with the coordination of the education programs offered by the Association.

Government Affairs Committee: The Government Affairs Committee is concerned with government issues, candidates and influence as well as our relationships with outside organizations. The goal of the committee is to position the Tucson Association of REALTORS® as a community leader and opinion shaper as we try to lead the community on strategic issues. Specifically, the committee is concerned with candidate evaluation and development, community outreach development, issues mobilization, lobbying, member political mobilization and education and RAPAC fundraising.

Green Committee: The Tucson Association of REALTORS® is continuing to go green! The Green Committee help shape the new focus in real-estate, which Forbes Magazine recently recognized as the fastest growing segment in real estate.

Housing Opportunities Committee: REALTORS® are committed to providing fair housing, creating affordable housing for our community, reaching out to the less fortunate and educating future home buyers about the responsibilities and opportunities of owning a home. The Housing Opportunities committee is very active in informing members about fair housing issues, developing programs for housing affordability, sponsoring fundraisers for groups like Habitat for Humanity and presenting educational seminars for the buying public.

Member Outreach Committee: Oversees external communications and promotes the value and role of REALTORS® to the community. Members of this committee are responsible for events that bring REALTORS® and affiliates together for networking opportunities, celebrations and

forums to exchange information in an informal environment and create a sense of community among the Association family.

National Association of REALTORS® (NAR) Directors: N.A.R. Directors represent Tucson and Arizona's Region at National Association of REALTORS® Meetings.

Nominating / Credentials Committee: Responsible for recruiting at least one (1) qualified candidate for each vacant Officer, Director, AAR Quota Director and NAR Director position to be filled, as well as recommends Honorary Life Member candidates to the Board of Directors. Additionally, this Committee identifies the outstanding work of Association volunteers to be recognized at the Annual Installation and Awards Gala.

Operations Committee: The Operations Committee is the current seated TAR Executive Committee.

Property Management Committee: This committee will educate membership on the standards of practice and competency reasonably expected in the property management discipline, and make recommendations regarding the MLS system with respect to rentals.

REALTOR® Risk Committee: REALTORS® are navigating uncharted territory of increased government scrutiny and an increasingly litigious society. The risks for REALTORS® in the marketplace are growing with regular headlines about RESPA violations and anti-trust investigations. The REALTOR® Risk Committee will monitor these trends, educate REALTORS® about the risks, constantly promote professionalism and demonstrate why people should have confidence in REALTORS®.

Strategic Planning Taskforce: Establishes and prioritizes the strategic objectives for the Association and the MLS; Implements Association's Strategic Plan.

TAR MLS Technology Committee: Identifies and assesses the best products to achieve the strategic goals of developing the most reliable, secure and accessible MLS system.

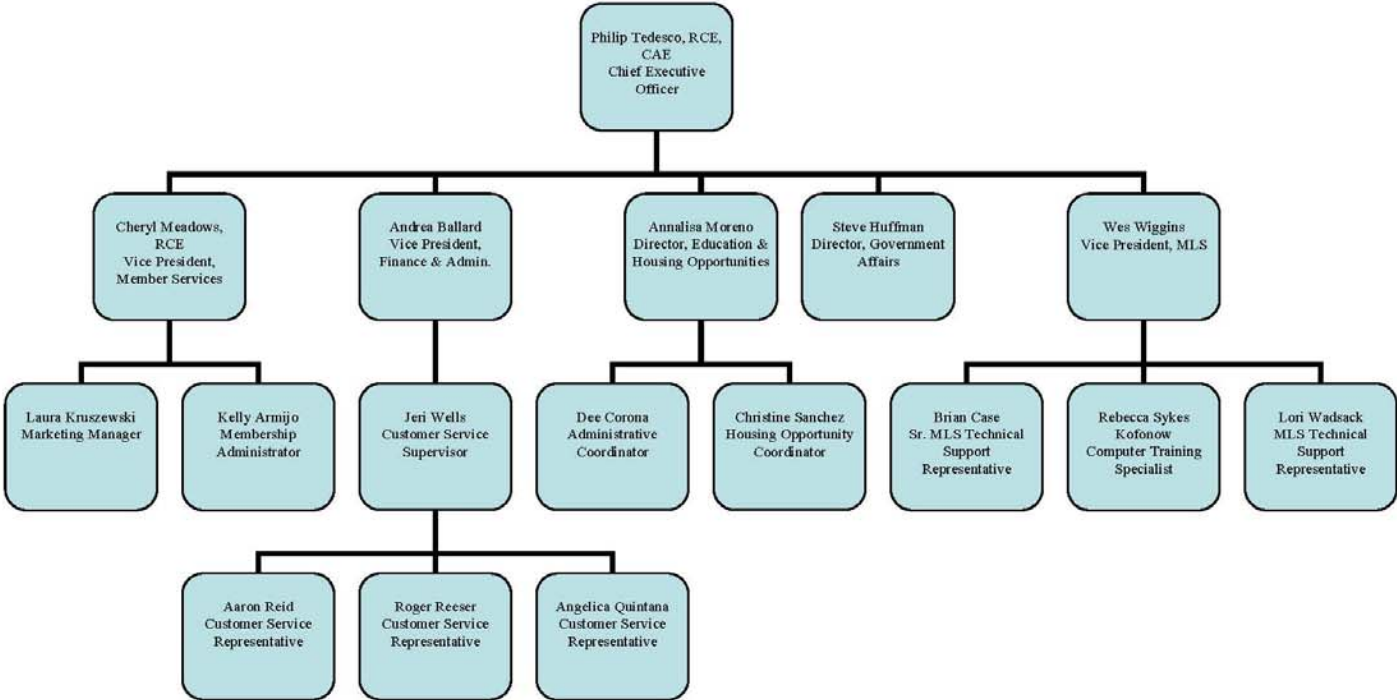
TAR MLS Standards Committee: Works to ensure integrity of MLS data, develop policies and procedures, and uniformly and predictably apply those rules to a variety of real world situations so that participants may rely on the MLS as the most accurate and most up-to-date system for real estate information in Southern Arizona.

TAR MLS Commercial Committee: Works to ensure integrity of MLS data, develop tools and guidelines specific to commercial MLS users, and attract more commercial users to the Tucson MLS.

Organizational Structure – Staff

Organizational Chart

**TUCSON Association of REALTORS®
(including TAR MLS)**



Tucson Association of REALTORS® Goal Assignments

To be completed by:	Goals
Boards & Officers:	
TAR Board of Directors	1.6; 1.8; 2.3; 2.6; 5.1; 5.2;
Chief Executive Officer	1.2; 2.5; 2.6; 4.1;
TAR Committees:	
Education Committee	2010.1; 2010.2; 2010.3; 2010.4; 2.6;
Member Outreach Committee	2010.5; 2010.6; 2010.7; 2010.8; 2010.9; 2010.10; 2010.11; 2010.12; 2010.13; 1.10; 1.11; 2.2; 2.6; 3.3; 3.4;
REALTOR® Risk Management Committee	2010.14; 2010.15; 2010.16; 2010.17; 2.6;
Government Affairs Committee	2010.18; 2010.19; 2010.20; 2010.23; 1.4; 2.6; 4.1; 4.5; 4.6;
Candidate Ballot Measure Taskforce (CBMTF)	1.4;
Housing Opportunities Committee	2010.24; 2010.25; 2010.27; 2.6;
Property Management Committee	2010.28; 2010.29; 2010.30; 2010.31; 2.6;
Operations Committee	2010.32; 2010.33; 2.6; 2.7;
Staff	2010.21; 2010.22; 2010.26; 1.1; 1.3; 1.4; 1.5; 1.7; 1.9; 1.10; 2.1; 2.2; 2.3; 2.4; 2.6; 3.1; 3.2; 3.5; 4.1; 4.2; 4.3; 4.4;

Tucson Association of REALTORS® Multiple Listing Service Goal Assignments

To be completed by:	Goals
TAR MLS Board of Directors	MLS2010.16; MLS2010.17; MLS2010.18; MLS 1.1; MLS 1.3; MLS 1.4; MLS 1.5;
Chief Executive Officer	
TAR MLS Committees:	
MLS Technology Committee	MLS2010.2; MLS2010.3; MLS2010.4; MLS2010.5; MLS 1.5;
MLS Standards Committee	MLS2010.6; MLS2010.7; MLS2010.8; MLS2010.9; MLS 1.5;
MLS Commercial Committee	MLS2010.10; MLS2010.11; MLS2010.12; MLS2010.13; MLS2010.14; MLS2010.15; MLS 1.5;
Staff	MLS 1.2; MLS 1.3; MLS 1.5;

Tucson REALTORS® Charitable Foundation Goal Assignments

To be completed by:	Goals
Tucson REALTORS® Charitable Foundation Board of Directors	TRCF 1.1; TRCF 1.2;
Chief Executive Officer	
Staff	